PeopleSoft Financials and Supply Chain Management 9.2

PeopleSoft Resource Management



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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help.

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the Oracle Software Delivery Cloud.

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment. The documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

Installable PeopleSoft Online Help now includes PDF versions of each PeopleBook. For more information, see Understanding Locally Installed PeopleSoft Online Help.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The three main types of common help are:

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- Application Fundamentals
- Using PeopleSoft Applications
- Using and Managing the PeopleSoft Online Help

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Finally, *Using and Managing the PeopleSoft Online Help* (this guide) introduces you to the setup, features, and usage of the online help system.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	Description
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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Typographical Convention	Description
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region, Country, and Industry Identifiers

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

An example of a region-specific heading is: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following are examples of region identifiers that may appear in PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Country Identifiers

Countries are identified by a three-letter country code. The following are examples of country identifiers that may appear in the PeopleSoft Online Help:

- ARG (Argentina)
- AUS (Australia)
- CAN (Canada)
- NLD (The Netherlands)

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Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following are examples of industry identifiers that may appear in the PeopleSoft Online Help:

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

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleSoft FSCM Related Links

Oracle Help Center

Hosted Online Help

PeopleSoft Information Portal

My Oracle Support

Financial and Supply Chain Management information for Search Framework search engine can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the Application Fundamentals: Understanding Keyword Search within Components topic.

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you're using.

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1

Getting Started with PeopleSoft Resource Management

PeopleSoft Resource Management Overview

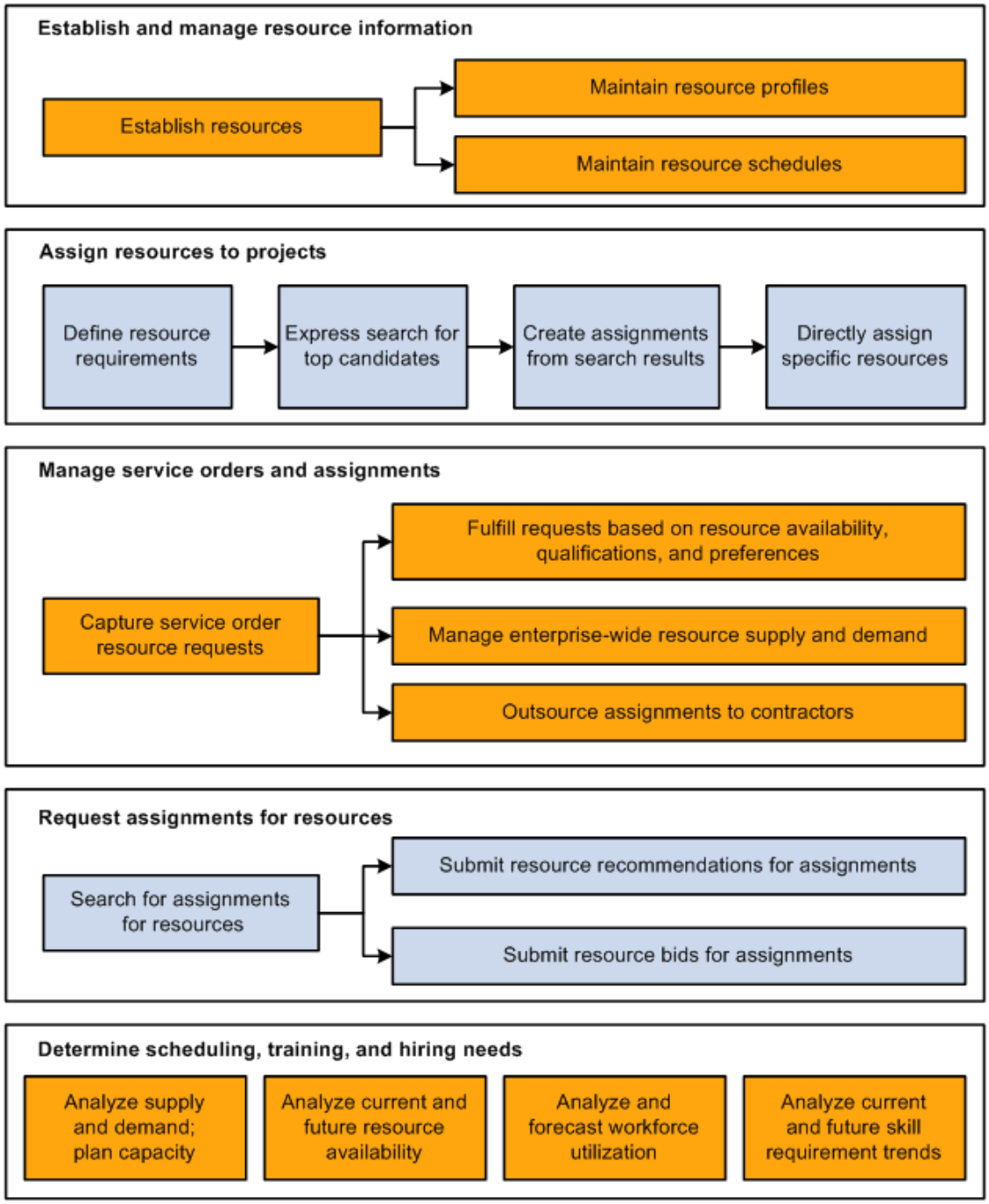
To successfully deliver professional services (or internal services), managers must have effective tools to perform optimal capacity planning, quickly find the right resources for jobs and anticipate resource supply and demand. Employees should also have the tools that enable them to shape the direction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

PeopleSoft Resource Management Business Processes

PeopleSoft Resource Management supports the main business process of resource and project portfolio management.

The following diagram illustrates the Resource Management business processes:

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These business processes are discussed in the business process topics in this documentation.

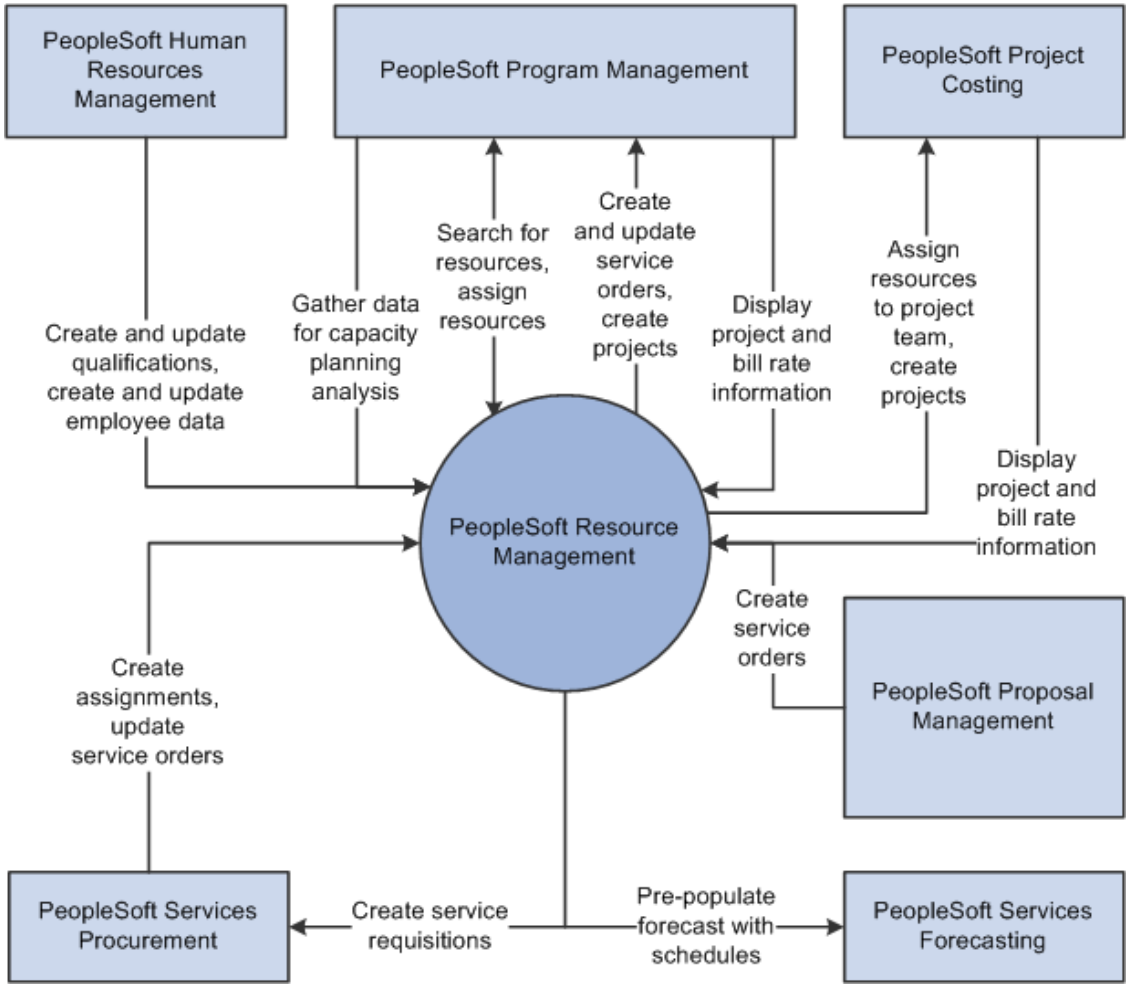
Related Topics

- PeopleSoft Resource Management Business Processes
  PeopleSoft Resource Management supports the main business process of resource and project portfolio management.

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PeopleSoft Resource Management Integrations

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



Integration considerations are discussed in the implementation topics in this documentation.

Supplemental information about third-party application integrations is located on Oracle's My Oracle Support website.

Related Topics

- Understanding PeopleSoft Resource Management and PeopleSoft HCM
  PeopleSoft Resource Management integrates with the Manage Profiles business processes in PeopleSoft HCM. The integration between the HCM database and the Financials database requires careful planning before you design and implement configurations in both databases. Key data records exist in both databases, and they are maintained asynchronously using application messages.
- Understanding Integration with PeopleSoft Program Management
  This section discusses integration with PeopleSoft Program Management.

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PeopleSoft Resource Management Implementation

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

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

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

Component	Component Interface	References
RS_CM_COMPTNCY_TBL	RS_CM_COMPTNCY_TBL	See Establishing Application Setup Tables for Competencies.
RS_CM_PERSONAL	RS_CM_PERSONAL	See Creating Employee Data.
RS_CUST_INFO	RS_CUST_INFO	See Working with Customer and Contact Profiles.
RS_WRKR_CREATE	RS_WRKR_CREATE	See Establishing and Maintaining Employees and Non-Employees as Resources.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, and appendix guidelines.

See the product documentation for *PeopleTools: Component Interfaces*

Setting Up the PeopleSoft Search Engine

PeopleSoft combined with People Tools provides search capabilities using the Oracle Search Framework, which is implemented through the PeopleSoft Search Framework. The PeopleSoft Search Framework provides a standard method to use search indexes for all PeopleSoft applications. The Search Framework depends on the Search Framework.

Search types — Express Search, the Staffing Workbench, and the Job Spy and Manage Utilization— use the Search Framework.

For more information about PeopleSoft Search for Financials and Supply Chain Management, See Application Fundamentals: Understanding Financials and Supply Chain Search

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Navigating in Resource Management

Viewing Resource Management Navigation Collections

This topic provides an overview of Navigation Collections and discusses how to set up navigation collections.

Pages Used to View Navigation Collections

Page Name	Definition Name	Usage
Navigation Collections - Find an Existing Collection Page	PTPP_SCSRCH	Search for an existing Navigation Collection that you want to edit or delete. Access pages that you can use to create new Navigation Collections.
Maintain Collection - Navigation Collection Page	PTPP_SCMAINTCOLL	Maintain Navigation Collections.

Understanding Navigation Collections

Navigation collections are sets of links into Financials database that support the users' ability to perform key business processes in a services organization. PeopleSoft delivers Navigation Collections to facilitate the performance of key business processes. The primary users of Navigation Collections are directors, resource supervisors, project and program managers, resources, and contract and billing administrators. System administrators can modify a Navigation Collection to include links to any component or page in the Financials database.

Viewing Resource Management Navigation Collections

Resource Management Navigation Collections group common functional areas used in Resource Management into a single tile. This tile can be added to the Fluid Homepage so that a user can have easy access to the Resource Management functional areas grouped under the Resource Management Navigation Collections.

To view Navigation Collections in Resource Management:

Navigation:

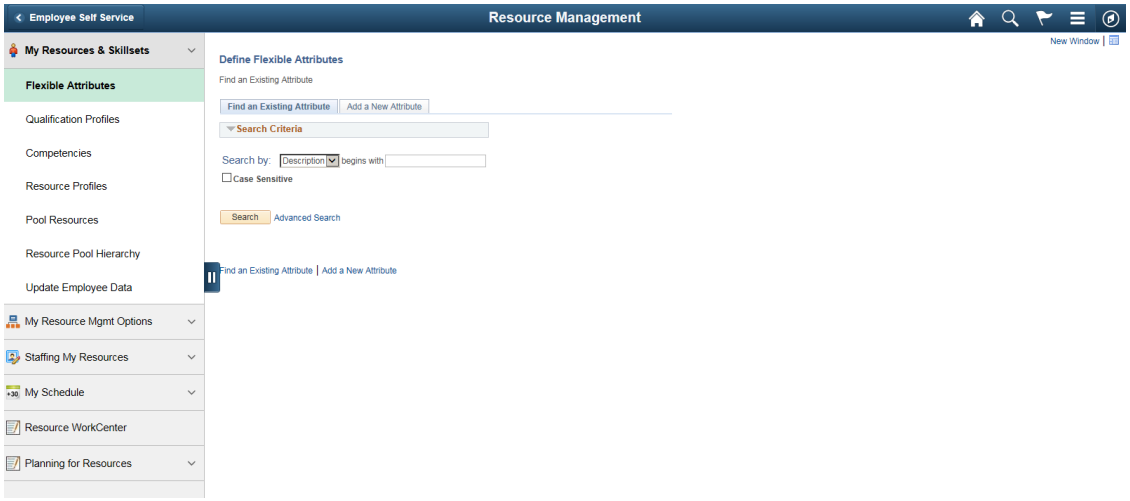
Select **Personalize Homepage** link on the PeopleSoft Fluid Homepage.

Select **Add Tile**, and then **FSCM Navigation Collections**, and then **Resource Management**, **Save**.

Select the Resource Management tile on the Fluid Home Page.

This example illustrates the fields and controls on the Resource Management Navigation Collections.

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Navigation Collections - Find an Existing Collection Page

Use the Navigation Collections - Find an Existing Collection page (PTPP_SCSRCH) to search for an existing Navigation Collection that you want to edit or delete.

You can use these to create new Navigation Collections.

Navigation:

PeopleTools, and then **Portal**, and then **Portal Utilities**, and then **Navigation Collections**

Maintain Collection - Navigation Collection Page

Use the Maintain Collection - Navigation Collection page (PTPP_SCMAINTCOLL) to maintain Navigation Collections.

Navigation:

Select the **Edit** link for an existing Navigation Collection on the Navigation Collections - Find an Existing Collection page.

Administrators can modify Navigation Collections as follows:

1. Search for the navigation collection that identifies the business process that you want to modify.
2. Select the **Edit** link corresponding to the Navigation Collection.
3. Add or edit links or folders on the Maintain Collection - Navigation Collection page.

See *PeopleTools: Portal Technology,* "Working With Navigation Pages."

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3

Understanding PeopleSoft Resource Management Business Processes

PeopleSoft Resource Management Business Processes

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

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

- Establish and manage resource information, including:
  - Establish resources.
  - Maintain resource profiles.
  - Maintain resource schedules.
  - Maintain resource pools.
- Assign resources to projects, including:
  - Define resource requirements.
  - Perform express searches for the best candidates.
  - Create assignments from search results.
  - Directly assign specific resources.
- Manage service orders, generic resource requests, and assignments, including:
  - Record service order resource requests.
  - Fulfill resource requests based on resource availability, qualifications, and preferences.
  - Manage enterprise-wide resource supply and demand.
  - Outsource assignments to contractors.
  - Identify service orders and assignments that need attention.
  - Control resource assignment status and schedule changes.
  - Notify users of resource assignment status and schedule changes.
- Request assignments for resources, including:
  - Search the service order pool for desirable assignments for resources.
  - Submit resource recommendations for assignments.
  - Submit resource bids for assignments.

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- Determine the scheduling, training, and hiring needs, including:
  - Analyze current and future resource availability.
  - Analyze and forecast workforce utilization.
  - Analyze current and future skill requirement trends.
  - Conduct capacity planning to balance resource supply with project demand.

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

Data Components That Support the Staffing Process

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

This section discusses:

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

Resource Profiles

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

The resource profile contains the following information about each resource:

Resource Profile Section	Description
Overview	Briefly describes the resource's work objectives and background.
Specialties	Identifies the competencies or competency categories that are strengths or areas of expertise for the resource.

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Resource Profile Section	Description
Work Experience	Summarizes the work that the resource has performed. This information is updated automatically by PeopleSoft Resource Management each time a resource receives a new assignment. Information can also be entered manually. You typically use manual entry when the product is implemented or when a new resource joins the organization and wants to add previous consulting experience to the profile. Additionally, you can attach, view, and delete resume documents for the resource in the Work Experience section. **Note:** If the PeopleSoft Resource Management resource is also established as an eligible resource in PeopleSoft Maintenance Management or Staffing Front Office, the profile will show all of the resource's assignments that were made through any of these products.
Qualifications	Lists competencies and accomplishments that describe the resource, such as competencies, interests, education, licenses and certificates, languages, memberships, honors and awards, and test results. You select the qualifications to track during PeopleSoft Resource Management implementation.
Preferences	Tracks flexible resource preference attributes defined by the organization. The system uses this information to match resources with projects that they prefer.
General Information	Provides access to a resource's address and phone numbers, job information, passports and visas, weekly work days, home airport, assignment restrictions, and other resource attribute values.
Resource Profile (summary)	Appears as a single display-only page. During implementation, you select the sections to appear.

Resource Pools

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

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

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

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Resource Schedules

PeopleSoft Resource Management uses the resource schedule to interactively manage a resource's availability for assignments. Typically, employees in these roles have access to view and update the schedule:

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

You can create schedule entries manually to reflect meetings, training, or personal time. The system updates the schedule during the assignment process to reflect the resource's scheduled work.

If the Resource Management resource is also established as an eligible resource in PeopleSoft Maintenance Management or Staffing Front Office, the schedule will show all of the resource's assignments that were made through any of these products.

Assignments

Once you define resource requirements for a job and identify an appropriate resource, you create an assignment to assign the resource to the job. Assignments are the goal of the staffing process. Each assignment pairs a resource with a unit of work. You can create assignments that specify the exact number of hours and minutes a resource is to be assigned to a job. You create assignments as the final step in a business process that usually begins with one of the following actions:

- The creation and fulfillment of a service order.

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

- The creation and execution of an express search.

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

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

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

- The creation and fulfillment of generic resource requests.

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

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

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

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

Service Orders

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

Once service orders are entered, they are maintained by a set of status values that reflect service order fulfillment progress. The system uses the requirements detailed in the service order and resource request to match the available, qualified resources during the order fulfillment process in the Staffing Workbench component.

If you use PeopleSoft Program Management, you can create service orders to fulfill generic resource placeholders on projects. When you find a named resource and create an assignment to fulfill a resource request, the named resource replaces the generic resource throughout the system.

Resource Matching

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

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

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- Find work for resources by using the Staffing Workbench - Manage Utilization page.
- Find work for yourself by using the Job Spy page.
- Search for resources to fulfill demand by using the Staffing Workbench - Fulfill Orders page.
- Search for resources to fulfill generic resource requests by using the Pool Manager Workbench - Fulfill Request page.

The Express Search feature provides an ad hoc method of using Resource Matching to find resources. You can specify requirements and perform an express search for resources without a service order.

Capacity Planning

PeopleSoft Resource Management provides Information Technology (IT) and development organizations with capacity planning functionality to empower managers who make important demand commitment decisions based on limited resources or capacity information. This functionality evaluates demand for labor resources that you capture in projects, and demand that you capture from external sources and import through an Excel-to-Component Interface utility, and compares it to available Resource Management resources.

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

To fully use the SCP functionality from demand, PeopleSoft Program Management and Project Costing must obtain demand from projects. Demand is obtained from projects and external demand, and not from service orders.

By managing with SCP, you can:

- Create and join a supply and demand forecast that highlight future resource gaps and gluts.
- Perform what-if scenario analyses to find the optimal mix of demand and supply.
- Plan resources to resolve future resource imbalances.

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

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

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4

Setting Up with PeopleSoft Resource Management

Setting Up with PeopleSoft Resource Management

PeopleSoft combined with People Tools provides search capabilities using the Oracle Search Framework, which is implemented through the PeopleSoft Search Framework. The PeopleSoft Search Framework provides a standard method to use search indexes for all PeopleSoft applications. The Search Framework depends on the search engine.

Search types — Express Search, the Staffing Workbench, and the Job Spy and Manage Utilization— use the Search Framework.

For more information about Understanding Search Framework for PeopleSoft Resource Management, See Resource Matching Using Search Framework. For more information about PeopleSoft Search for Financials and Supply Chain Management, Application Fundamentals: Understanding Financials and Supply Chain Search

For More information on Search Technology See the product documentation for *PeopleTools: Search Technology*

Resource Matching Using Search Framework

This section lists prerequisites and discusses:

- Resource Matching purpose.
- Search Framework.
- Resource Matching process flow.
- Factors, factor families, and objective fit.
- Flexible attributes.
- Relative importance of factors and factor families.
- Resource groups.

Prerequisites

Before you can use Resource Matching, you must:

- Select Resource Matching options during implementation on the Search Configuration - Factor Weights page.

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

  See Setting Up and Maintaining the Search Framework and Resource Matching Cache Tables.

- Optionally define flexible attributes.

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See Defining Flexible Attributes.

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

  See *PeopleTools: Integration Broker*

- Establish and maintain the Search Framework index.

  See Setting Up and Maintaining the Search Framework and Resource Matching Cache Tables.

Resource Matching Purpose

The Resource Matching process matches eligible resources to resource demand. It objectively assesses all the resources in your organization and ranks a resource's level of fitness for each defined factor measured against the requirements for a job. Alternatively, it evaluates all unfulfilled demand and determines, for a given resource, which jobs are appropriate.

While the results are available from many points within the application, the process is virtually transparent to the end user. Several features take advantage of resource matching to:

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

Search Framework

Oracle's search engine is integrated into PeopleSoft applications via the PeopleTools Search Framework. The searches are not performed directly against the database but are performed by the search engine against the indexes stored in the Search Framework server. The indexes are created based on the information contained in PeopleSoft Resource Management. The indexes are not updated online, but through a batch process.

The search is implemented as an Application Class that receives search criteria as input and returns results in the form of resources, orders, and so on, with associated scores.

PeopleSoft Resource Management uses the three types of searches:

- Express Search

  The Express Search enables you to specify resource requirements and search for resources to fulfill those requirements in a single session without a service order.

- Staffing Workbench

  The Staffing Workbench provides both the Fulfill Orders and Manage Utilization search features. This component includes 2 of the 11 search features:

  - **Fulfill Orders** — find resource to fill service orders
  - **Manage Utilization** — find open resource requests that fit the skills and interests of eligible resources

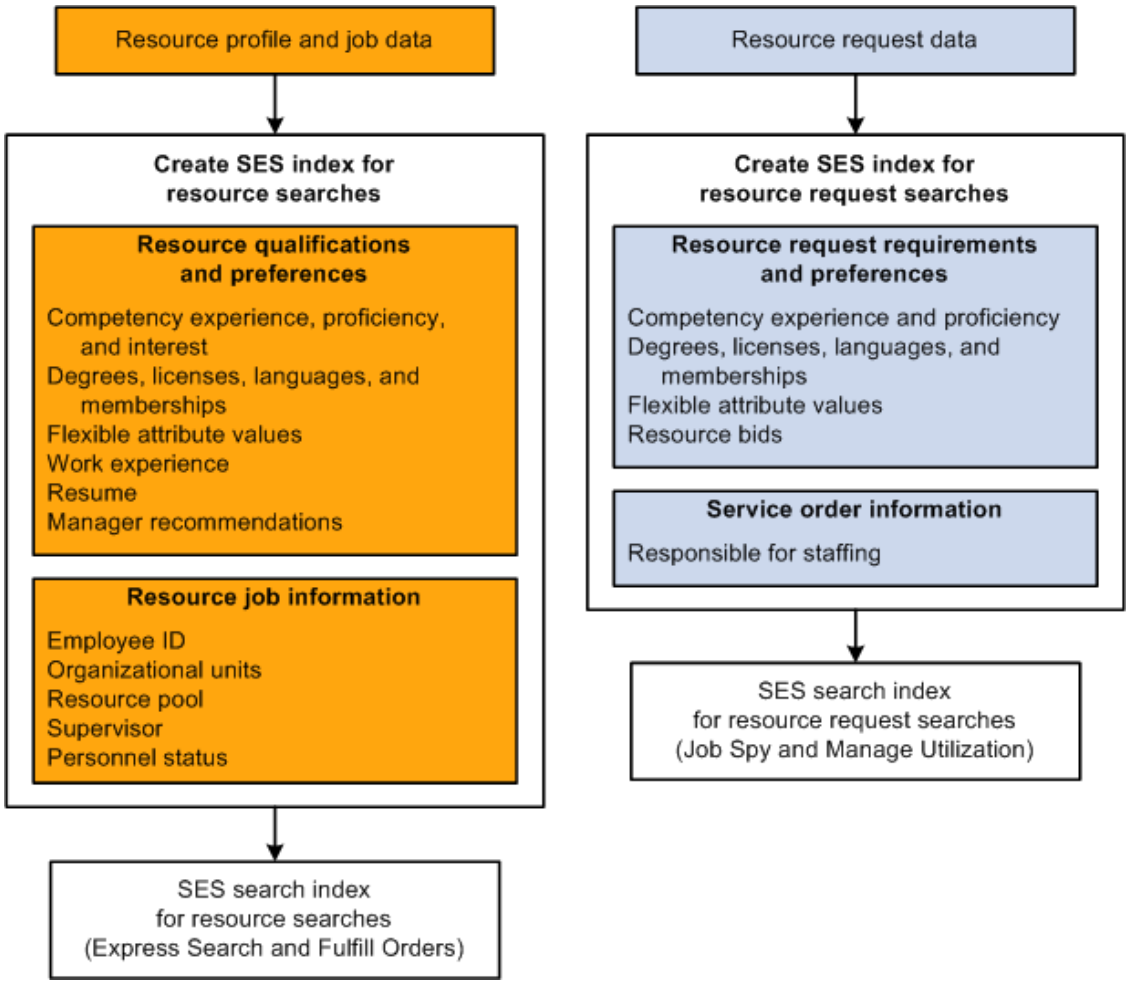
- Job Spy and Manage Utilization

  This feature helps in finding open resource requests that match your qualifications, preferences, and availability.

Resource Matching uses the Search Framework to quickly calculate qualification and preference scores for each resource. The Search Framework enables PeopleSoft applications to execute free-text data searches.

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The Search Framework indexing application transforms those files into an index—a Search Framework collection—that is used for searching, as shown in this diagram:



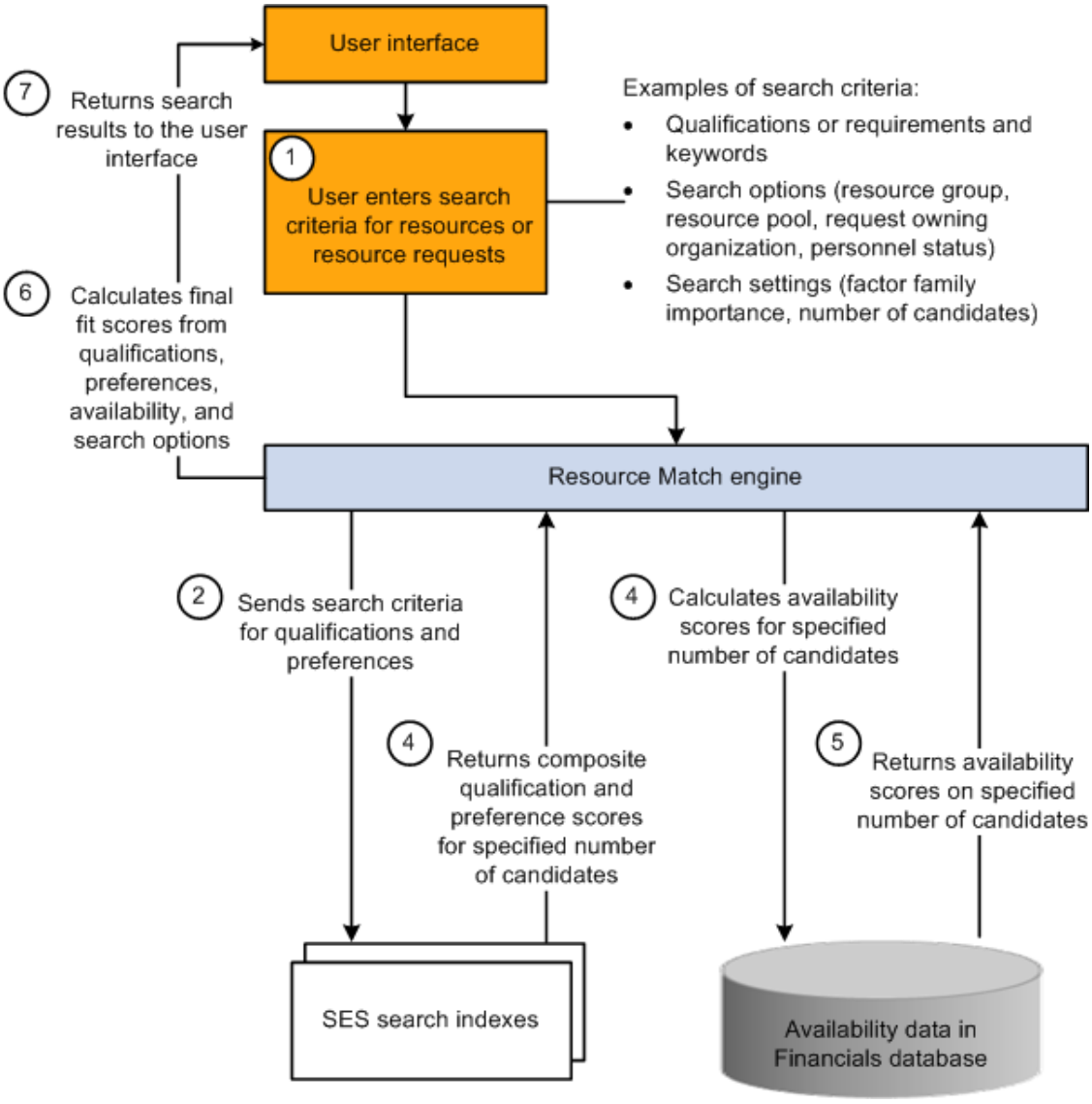
See Setting Up and Maintaining the Search Framework and Resource Matching Cache Tables.

Resource Matching Process Flow

This diagram shows the high level process steps that occur when you search for resources or resource requests by using Resource Matching:

This diagram shows the high level process steps that occur when you search for resources or resource requests by using Resource Matching:

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Factors, Factor Families, and Objective Fit

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

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

In the context of Resource Matching, a factor is one way to evaluate the fit between a resource and a resource request. A factor can usually be presented as a question. For example, the

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Availability factor asks the question, "Is the resource available during the requested time frame?" The Competency Proficiency factor asks the question, "Does the resource have the requested proficiency in the requested competencies?" Resource Matching generates a quantitative, objective answer to the questions posed by each of the factors.

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

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

This table describes the nine standard factors:

Factor	Description
Accomplishments	Compares a resource's degrees, licenses, languages, and memberships with the requested degrees, licenses, languages, and memberships on a resource request.
Competency Proficiency	Compares the requested competency proficiency on the resource request with the competency proficiency of the resource.
Competency Experience	Compares the requested competency years of experience on the resource request with the number of years of experience that the resource has in the requested competencies.
Resume	Compares resume data with keywords that are specified on a resource request. Resource resume documents are attached to the resource profile and the default resume attachments are indexed by Search Framework.
Project Experience	Compares the work experience description with keywords that are specified on a resource request. Work experience entries are stored in the resource profile. The work description is indexed by Search Framework.
Manager Recommendations	Evaluates whether a manager recommended a resource for a resource request. Recommended resources are considered a good fit.
Competency Interests	Compares the requested competencies on a resource request with the competency interests of the resource. Resources who have expressed interest in the requested competencies are considered a good fit.
Resource Bids	Evaluates whether the resource expressed interest in the resource request. Resources who submit a bid for a resource request are considered a good fit.

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Factor	Description
Availability	Compares resource schedules against the requested start and end dates of a potential assignment on a resource request. Resources who have more unscheduled time during the requested time frame are considered a better fit. By acting as a repository for tasks, the resource schedule reflects the availability for each resource. Assignment statuses and task categories are used to calculate the Availability factor for each resource.

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

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

Flexible Attributes

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

The two types of flexible attributes are:

- Resource attributes.

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

- Service order attributes.

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

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

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

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

Relative Importance of Factors and Factor Families

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

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

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

- During implementation, on the Search Configuration - Factor Weights page, you can prioritize the fit scores for search types for individual factors within factor families.

  You can define different criteria for each search type. These priorities specify the factors that are used by Resource Matching and how much weight to give to each factor.

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

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

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

Resource Groups

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

Resource groups serve two main purposes:

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

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

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> **Note**
>
> When evaluating resource factor fit scores, Resource Matching only retrieves resources that are members of the resource group specified for the search.

Features That Use Resource Matching

This section discusses:

- Matching service orders to resources using the Staffing Workbench - Fulfill Orders page.
- Finding assignments for resources using the Staffing Workbench - Manage Utilization page.
- Finding assignments using the My Assignments - Job Spy page.
- Express searching.
- Matching generic resource requests to resources using the Pool Manager Workbench.
- Selecting search options and settings.

Matching Service Orders to Resources Using the Staffing Workbench - Fulfill Orders Page

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

Finding Assignments for Resources Using the Staffing Workbench - Manage Utilization Page

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

Finding Assignments Using the My Assignments - Job Spy Page

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

Express Searching

The Express Search feature finds resources that meet specified qualifications and ranks the search results according to preferences, qualification scores, and availability. Express Search allows you to specify resource requirements and search for resources to fulfill those requirements in a single session without a service order. You can define requirements through the use of a qualification profile, or select from a list of qualifications from the Competency tree. You may also specify keywords as part of your criteria. After you define the qualifications,

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specify the project start and end dates, and select the group of resources to consider in the search.

Matching Generic Resource Requests to Resources Using the Pool Manager Workbench

Pool managers that receive generic resource requests (instead of service orders) can use Resource Matching to determine fit scores on the Pool Manager Workbench.

See Understanding Generic Resource Requests.

Selecting Search Options and Settings

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

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

Resource Matching Fit Score Calculations

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

- Accomplishments factor.
- Competency Proficiency and Competency Experience factors.
- Qualification importance ratings.
- Work Experience and Resume factors.
- Manager Recommendation factor.
- Flexible Qualification factors.
- Competency Interest factor.
- Resource Bid factor.
- Flexible Preference factors.
- Availability factor.
- Overall fit score.
- Express searching for resources without a service order.

Accomplishments Factor

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

- Education (degrees).

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- Licenses and certificates.
- Memberships.
- Languages.

> **Note**
>
> Resource Matching does not include honors, awards, and test results in the Accomplishments factor fit score.

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

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

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

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

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

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

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

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Accomplishment Type	Resource Matching Rules
Licenses and Certificates	You can specify on the resource request which license or certificate the resource should have, and a country and state or province where the license or certificate was received. The fit score for this accomplishment type is: • *100* for resources who have the requested licenses or certificates from the requested country and state or province, and whose licenses or certifications are current as of the start date of the assignment. • *100* if no country and state or province are specified on the resource request, resources have the requested licenses or certificates, and the licenses or certificates are current as of the start date of the assignment. • *0* for resources who do not have the requested licenses or degrees, or whose certification is expired by the time the assignment begins. • *0* if country and state or province are specified on the resource request, and the resources' licenses and certificates do not have these additional attributes.
Memberships	You can specify on the resource request which professional membership the resource should have. The fit score for this accomplishment type is: • *100* for resources who have the requested memberships. • *0* for resources who do not have the requested memberships.
Languages	You can specify on the resource request which languages the resource should know. For each requested language, you must specify the desired proficiency level in three proficiency categories—speaking, reading, and writing. Available proficiency values are Low (the default value), Moderate, and High. Resources who have at least the requested proficiency in each proficiency category for the specified language receive a score of *100* for the accomplishment. **Note:** When determining the fit score for languages, Resource Matching assigns the same score to resources who exceed the requested proficiency and resources who meet it. Resources with no proficiency in any of the desired proficiency categories receive a score of *0* for the accomplishment. Resources who have some proficiency in the desired categories, but not to the requested level, receive a score between *0* and *100,* with a higher score indicating a better fit.

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Competency Proficiency and Competency Experience Factors

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

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

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

- *100* for both factors for resources who have at least the proficiency and number of years of experience in the competency that is specified on the resource request.
- Less than *100* but greater than *0* on one of the factors for resources who have some proficiency or years of experience in the requested competency, but not as high as requested.
- *0* for resources who have no proficiency or years of experience in the requested competency.

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

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

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

Competency Proficiency Ratings

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

Individual Competency Fit Scores

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

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Qualification Importance Ratings

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

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

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

Resources with a failing score are not recommended for that assignment by Resource Matching.

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

Work Experience and Resume Factors

Resource Matching uses Search Framework to conduct free-text data searches for the work experience and resume factors. Keywords define the criteria used to calculate these fit scores by searching the work experience description and default resume document attachment on the resource profile.

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

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Manager Recommendation Factor

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

Recommendations influence the staffing process in two ways:

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

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

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

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

Flexible Qualification Factors

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

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

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

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

Single-value and multiple-value flexible qualification attributes are handled in a slightly different manner on the resource request. In both cases, the resource request user can request multiple

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values for each attribute, but the meaning of the lists of values is subtly different. For single-value attributes, the list of values on the resource request represents the pool of desirable attribute values; a resource with any of the specified values is acceptable. For multiple-value attributes, the list of values on the resource request represents a portrait of the ideal resource; the perfect resource has all of the requested values.

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

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

Flexible Qualification Factor Importance Ratings

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

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

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

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

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

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

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

Single-Value Versus Multiple-Value Factors

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

- *100* for resources who have the requested attribute value with the highest importance.

  In the previous example using region, resources from the western region receive a fit score of *100.* In cases where two requested values share the same, highest importance, resources with either value receive a score of *100.*

- Between *0* and *100* for resources who have a requested attribute value that is not the highest importance.

  Resources with one of the other requested values receive a score between *0* and *100* proportional to the importance assigned to that value.

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

- *100* for resources who have all of the attribute values that are specified on a resource request.

  In the previous example using industry experience, only resources with both government and telecommunications experience receive a score of *100.*

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

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

Competency Interest Factor

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

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

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

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

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

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

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

Understanding the Relationship Between Competency Importance and Competency Interest Fit Scores

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

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

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

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

Resource Bid Factor

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

Bids influence the staffing process in two ways:

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

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

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

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

Flexible Preference Factors

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

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

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

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

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

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

Availability Factor

The Availability factor is a ratio of a resource's unscheduled time during the future dated resource request time frame to the amount of work on the request. At a high level, the factor compares the requested start date, end date, total days of work, and number of hours per day

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on a resource request to the resource schedules. Resource schedules track the amount of time that resources are working on assignment and appointment tasks. Each task has a start date, end date, and number of hours per day to indicate the amount of time during the task period that the resource is working on that task.

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

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

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

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

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

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

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

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

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Resource Request Period, Period Days, and Days of Work

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

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

The availability score of a resource also takes into consideration of the number of days a resource is ineligible to be staffed. For example, assume a resource request is for 10 days, September 7th – September 18th, and the resource is made ineligible to be staffed from September 14th – September 18th, when a search is conducted, the availability score for the resource will be 50%.

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

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

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

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

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

Part-Time and Full-Time Resources

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

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

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

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

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

(resource weekly work hours / resource standard work days per week / standard hours per day),

which is specified on the Resource Setup - Common Installation Options page.

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

Task Flexibility

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

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

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

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

Full-Day Assignments

A full-day assignment requires that a resource is available to work on the assignment for at least the standard hours per day each day of the assignment. Resources with fewer demands on their time during the resource request period receive a higher Availability factor fit.

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Resources with a standard day less than 100 percent always receive a score of *0* for full-day assignments. A full-day assignment is specified on the resource request by clearing (not selecting) the **Partial Days Acceptable** option on the request.

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

- *100* for resources with no tasks scheduled during the requested period for a full-day assignment.
- *100* for resources with scheduled tasks in a category that has a flexibility of 100 percent.
- *100* for resources that have assignments in the requested date range but that are available for the requested hours per day.
- *0* for resources with no available days during the requested period for a full-day assignment.
- Between *0* and *100* for resources with some, but not all, days available during the requested period.
- Between *0* and *100* for resources with scheduled tasks in a category that has a flexibility greater than 0 percent during the requested period.
- *0* for resources with partially-scheduled days during the requested period for a full-day assignment.

Partial-Day Assignments

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

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

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

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

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

Resource Availability Cache

Any change to the resource schedule triggers the Resource Schedule application message (RS_SCHED_TASK) to update the Resource Availability Cache table (RS_DF_WRKR_DATE). The Resource Availability Cache table stores resource schedule data that the Resource Match

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engine uses to calculate Availability fit scores when you search for resources to match resource requests.

Overall Fit Score

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

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

A resource's overall fit score includes:

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

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

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

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

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

Express Searching for Resources Without a Service Order

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

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Framework to find resources who meet your qualifications, and ranks the search results according to qualification scores and availability.

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5

Preparing to Implement PeopleSoft Resource Management

Understanding Employee Source Data Options

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

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

- PeopleSoft HCM application database.
- An earlier version of PeopleSoft HCM or a third-party HCM application.
- PeopleSoft Financials application database, which includes Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management.

This section discusses:

- PeopleSoft HCM.
- PeopleSoft Resource Management without PeopleSoft HCM integration.
- Employee and non-employee source data.

PeopleSoft HCM

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

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

Related Topics

- Understanding PeopleSoft Resource Management and PeopleSoft HCM
  PeopleSoft Resource Management integrates with the Manage Profiles business processes in PeopleSoft HCM. The integration between the HCM database and the Financials database requires careful planning before you design and implement configurations in both databases. Key data records exist in both databases, and they are maintained asynchronously using application messages.

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PeopleSoft Resource Management Without PeopleSoft HCM Integration

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

Related Topics

- Understanding PeopleSoft Resource Management Without PeopleSoft HCM
  This section lists a prerequisite and discusses resource profiles.

Employee and Non-Employee Source Data

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

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

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

  You can control non-employee resources' eligibility, maintain their competencies, accomplishments, and schedules, search for non-employee resources, and assign non-employee resources to projects and service orders. In addition, the **Person Type** field (PER_TYPE) appears on the Employee Data page so that you can further classify the non-employee. Examples of non-employee person types are temporary worker or independent contractor.
- If your organization allows only employees to be established as resources, the non-employee's personnel status appears on the Employee Data page for information, but you cannot establish a non-employee as a resource.

  Resources that appear elsewhere in the system all have the personnel status *Employee.*

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

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

Understanding the PeopleSoft Business Structure

As with all PeopleSoft applications, you recreate your business environment within the PeopleSoft business structure when implementing PeopleSoft Resource Management.

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Business units, SetIDs, and tablesets are the foundation that enables the flexible grouping of your people assets while minimizing the administrative burden of maintaining organization attributes. This feature enables you to organize your businesses by dividing them into logical units other than companies and departments—a particularly useful feature for companies that are operating in the global market. This feature also enables you to control how you share your organizational data among those organizational units.

This section discusses:

- Business units, SetIDs, tablesets, and record groups.
- Projects and general ledger business units.

See the product documentation for *PeopleTools: Application Designer Developer's Guide*

Related Topics

- Understanding PeopleSoft Resource Management and PeopleSoft HCM
  PeopleSoft Resource Management integrates with the Manage Profiles business processes in PeopleSoft HCM. The integration between the HCM database and the Financials database requires careful planning before you design and implement configurations in both databases. Key data records exist in both databases, and they are maintained asynchronously using application messages.
- Understanding PeopleSoft Resource Management Without PeopleSoft HCM
  This section lists a prerequisite and discusses resource profiles.

Business Units, SetIDs, Tablesets, and Record Groups

During implementation planning, familiarize yourself with these concepts:

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

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

See the product document for *PeopleTools: Applications User's Guide*

Related Topics

- Application Fundamentals: PeopleSoft Application Fundamentals Overview

Project and General Ledger Business Units

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

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PeopleSoft Program Management and Project Costing provide the link from Resource Management to the general ledger.

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

Understanding Organizational Units

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

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

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

Application Feature	Description
Owning organizations	The owning organization owns a service order, which is most likely the organization that sold the business to the customer and is responsible for ensuring that the requested services are delivered. The combination of owning business unit and owning organization are specified on each service order. Resources are tracked by organizational units. Resource Matching uses owning organizations to match resources with service orders. Users can search for resources in specific owning organizations to fulfill orders.
Resource groups	Resource groups are collections of resources grouped by organizational unit or supervisor ID. Resource groups can be defined and saved by a user, and serve two main purposes. They can be used to selectively limit, broaden, or redirect the search for resources to different parts of the organization. They also enable a resource manager to define the group of resources who appear on the Staffing Workbench - Manage Utilization page.

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Application Feature	Description
Reports	The Chart Resource Schedules, Scheduled Utilization, Unassigned Resources, Assignments Ending, Assignment Listing, and Average Staffing Time reports enable a user to indicate which organizational unit to analyze. For example, the Scheduled Utilization interactive report calculates resource utilization for the specified organizational unit, and has the capability to drill down to the utilization of each individual in the unit.

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

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

Understanding Resource Pools

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

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

Related Topics

- Understanding Capacity Planning
  This section discusses:

Understanding Storage of Resource Resume Attachments

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

PeopleSoft supports SFTP (secure FTP) for attachments and indexing by Search Framework.

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

Use the URL Maintenance page for the *RS_RESUMES* URL identifier and enter the **URL** in the format *ftp://<machinename>/directory name.* The *<machinename>* is the physical name by which the FTP server is identified on the network. You can include the directory name on the server where the resume attachments are stored, or you can store the resume attachments in the root directory of the FTP server. If you store the resume attachments anywhere but the root of the FTP server, it is necessary to append the directory name to the URL.

The RS_RESUMES URL must have a proper userid and encrypted password defined via the URL Properties link on the URL Maintenance page. Also, RS_RESUMES much be added to the Search Framework Attachment URLID list.

> **Note**
>
> The Userid and encrypted password should be entered using the URL Properties Page.

See *PeopleTools: System and Server Administration*

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6

Defining PeopleSoft Resource Management Business Units

Understanding PeopleSoft Resource Management Business Units

This section lists prerequisites and discusses:

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

Prerequisites

Complete these tasks before defining PeopleSoft Resource Management business units:

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

PeopleSoft Resource Management Business Units

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

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

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

2. Specify PeopleSoft Resource Management business unit options.

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

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

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

Service Order Routing and Notification Workflow

Service order workflow options control service order routing and notification features. Each service order is keyed by a business unit. PeopleSoft Resource Management determines

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which set of business unit options to use for a given service order by looking up the SetID associated with the service order's business unit. Service orders that belong to one business unit can use different service order workflow options than service orders that belong to another business unit.

Assignment Approval

Assignment approval options use workflow to control resource assignment.

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

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

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

Assignment Processing Email Notification

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

Generic Resource Approval

You can set up an option to require the pool manager to approve status and date changes on generic resource requests that you create from PeopleSoft Program Management.

Generic Resource Email Notification

You can specify whether the pool manager and project manager are notified when a generic resource request's status changes, and you can select the statuses that trigger the status change notification. You can also specify whether the pool manager is notified when a generic resource request's schedule changes.

Project Business Units

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

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

PeopleSoft HCM Business Units

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

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

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

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

Defining PeopleSoft Resource Management Business Units

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

This topic lists prerequisites and discusses how to create PeopleSoft Resource Management business units.

Pages Used to Define PeopleSoft Resource Management Business Units

Page Name	Definition Name	Usage
Creating PeopleSoft Resource Management Business Units	RS_BU_OPTIONS	Define a PeopleSoft Resource Management business unit and specify the default project integration template.
Resource Management Options Page	RS_BUS_UNIT_OPT	Specify the PeopleSoft Resource Management business unit options for service order workflow, assignment approval, and generic resource approval.
Assignments eMail Notification Options Page	RS_BUS_UNIT_NF_ASG	Specify the PeopleSoft Resource Management business unit options for assignment email notifications.
Generic Resource eMail Notification Options Page	RS_BUS_UNIT_NF_GRR	Specify the PeopleSoft Resource Management business unit options for generic resource request email notifications.

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Prerequisites

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

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

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

Related Topics

- PeopleSoft Project Costing: Understanding Projects
- PeopleSoft Project Costing: Understanding Integration with PeopleSoft General Ledger

Creating PeopleSoft Resource Management Business Units

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

Use the Resource Management Definition page (RS_BU_OPTIONS) to define a PeopleSoft Resource Management business unit and specify the default project integration template.

Navigation:

Set Up Financials/Supply Chain, and then **Business Unit Related**, and then **Resource Management**, and then **Setup RM BU Definition**

Service Order Options

Field or Control	Description
Integration	Enter a valid project integration template that the system uses when you create a project from PeopleSoft Resource Management.

Resource Management Options Page

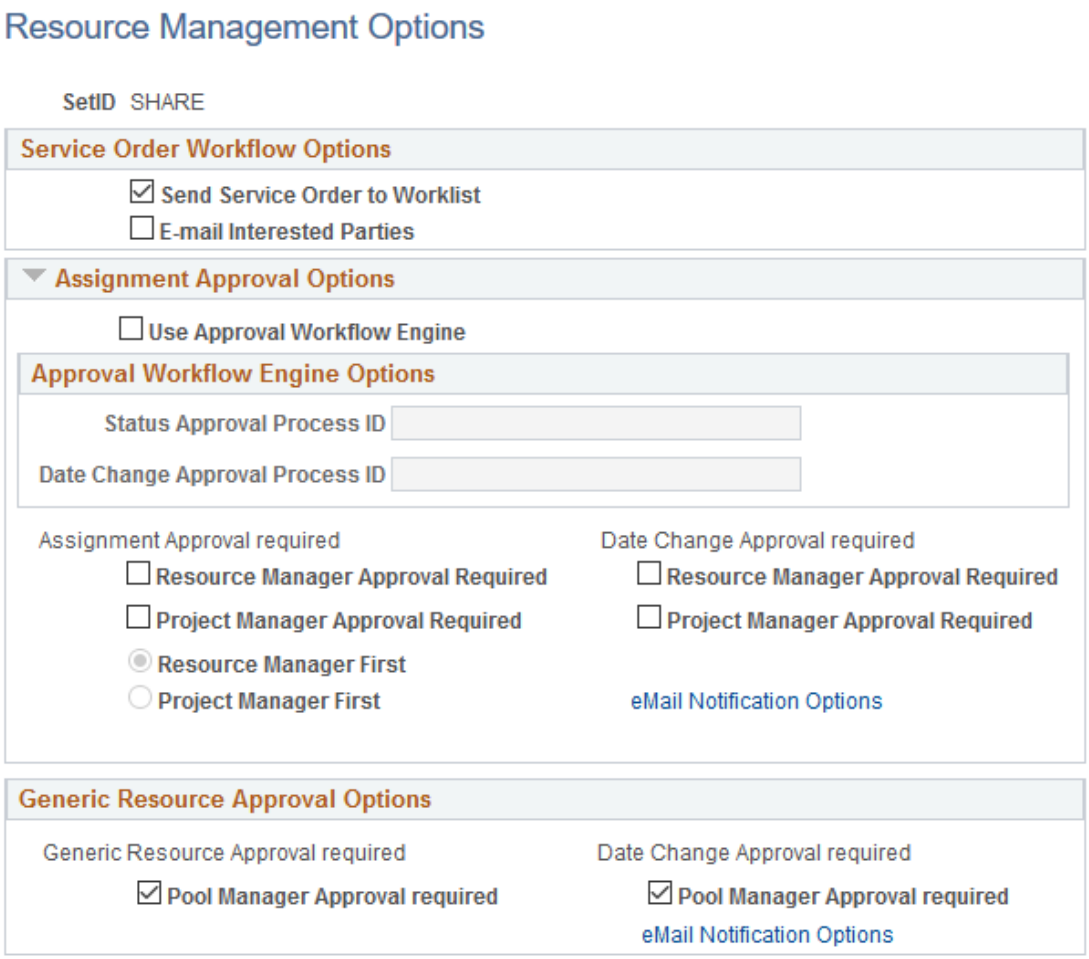
Use the Resource Management Options page (RS_BUS_UNIT_OPT) to specify the PeopleSoft Resource Management business unit options for service order workflow, assignment approval, and generic resource approval.

Navigation:

Set Up Financials/Supply Chain, and then **Business Unit Related**, and then **Resource Management**, and then **Setup RM BU Options**

This example illustrates the fields and controls on the Resource Management Options page. You can find definitions for the fields and controls later on this page.

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Assign the SetID used to specify business unit defaults and options when you enter the Business Unit Options component.

Service Order Workflow Options

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

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Field or Control	Description
E-Mail Interested Parties	Select to send an email notification each time the status of the service order changes to these users: • User designated as responsible for staffing the service order. • Each of the users listed as an interested party on the service order. Activating this option also sends an email notification to these users each time the status of the resource request changes: • Resources who received a manager's recommendation for the resource request. • Resources who submitted a bid on the resource request.

Assignment Approval Options

Field or Control	Description
Use Approval Workflow Engine	Select to use Approval Workflow Engine (AWE) for assignment approvals. Selecting this check box enables the **Approval Workflow Engine Options** group box that allows you to select the delivered approval process ID for the Assignment Status approvals and Assignment Date changes. Once you choose to use AWE, you do not have the option to switch back to the traditional workflow. The traditional workflow options (the options under Assignment Approval required and Date Change Approval required) are removed from the Business Unit Options page. **Note:** You may switch to AWE only when all pending traditional workflow transactions are approved and completed. An error displays if you switch to AWE with pending approval transactions in the traditional workflow.

Approval Workflow Engine Options

The Approval Workflow Engine has two workflow options:

Field or Control	Description
Status Approval Process ID	This field is available when you select the **Use Approval Workflow Engine** check box. The default Process ID is set to *AssignmentStatusApproval* This option is used for Assignment Status approval.

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Field or Control	Description
Date Change Approval Process ID	This field is available when you select the **Use Approval Workflow Engine** check box. The default process ID is set to *AssignmentDateApproval* This option is used for modification or addition of new date in an assignment.

The AWE allows you to define additional roles to the approval workflow to approve resource assignments. Use the Setup Process Definitions page to define an approval definition process. For more information, see Defining the Setup Process Definitions Component topic in *PeopleSoft Enterprise Components*, Approval Framework

Use the User List Definition page to define new users for the approval workflow. For more information, see Defining Users for Approval Framework topic in *PeopleSoft Enterprise Components*, Approval Framework

There are two roles for resource assignment approval — the supervisor (RS_SUPERVISOR) and the project manager (RS_MANAGER).

The RS_SUPERVISOR user list maps to the Supervisor ID of the resource on the Update Employee Data – Employee Job page. The RS_MANAGER user list maps to the Project Manager to which the resource is assigned (if PeopleSoft Program Management is installed).

All approval notification options, by default, is delivered via Email, Worklist and Push. For more information, see the Triggering Email Collaboration topic in *PeopleSoft Enterprise Components*, Approval Framework

Assignment Approval Options (when AWE is not selected)

> **Note**
>
> You use this method of approval when you do not use the Approval Workflow Engine Options.

When you select Resource Manager or Project Manager Approval Required in the Assignment Approval required section, PeopleSoft Resource Management automatically triggers workflow notification to the appropriate manager when you assign resources. When you select Resource Manager or Project Manager Approval required in the **Date Change Approval required** section, PeopleSoft Resource Management automatically triggers workflow notification to the appropriate manager when the assignment schedule changes.

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Field or Control	Description
Resource Manager Approval Required	Select to require that assignments in the business unit be approved by the resource's manager (his or her pool manager or supervisor), before the assignment status can change to *Assigned.* If you select this option, the **Resource Manager Options** group box appears on the page. If assignment approval is required, users other than the resource's required approvers cannot save an assignment with a status of *Assigned.* In this case, the status automatically changes to *Pending Approval.* When an assignment status changes to *Pending Approval,* the system sends a worklist item to the assigned approvers. The worklist item is a notification that the assignment needs to be approved. The resource's manager or project manager can save the resource's assignment with a status of *Assigned.* The system detects that the user is the resource's assigned approver and does not generate a worklist item. If both the resource manager and project manager must approve assignments, and either of the them creates an assignment, the assignment remains in a *Pending Approval* status and the system sends a worklist item to the other assigned approver.
Project Manager Approval Required	Select to require that assignments in the business unit be approved by the resource's project manager before the assignment status can change to *Assigned.* The project manager is defined on the Project Resources page in PeopleSoft Program Management. This option is available only if PeopleSoft Program Management is installed. **Note:** When project manager approval is enabled, users must assign a project manager to the project prior to assigning resources to the project. See Understanding Resource Schedules.

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Field or Control	Description
Resource Manager First and **Project Manager First**	Select the order in which the system routes assignment and date changes for approval. You can choose to route the workflow to the resource manager first or project manager first. For example, assume that you select only the **Resource Manager Approval Required** option for assignment approval, and both **Resource Manager Approval Required** and **Project Manager Approval Required** for date change approval. You also select the **Project Manager First** option to specify the approval sequence for date changes. You create a new assignment that the system routes only to the resource manager for approval. Subsequently you change the assignment date, at which time the system sends the date change first to the project manager for approval, and then to the resource manager for approval. The **Resource Manager First** and **Project Manager First** options are available for selection only if both resource manager and project manager are required approvers for assignments, or date changes, or both. The system disregards these options if you require only one approver. **Note:** If the first approver rejects the assignment, the system does not route the assignment to the second approver. For example, assume that you designate that both the project manager and the resource manager must approve assignments, and the project manager is the first approver. If the project manager rejects the assignment, the resource manager will not receive any workflow notification regarding the rejected assignment.

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Field or Control	Description
Resource Manager Approval Required	Select to require that assignment schedule changes be approved by the resource's manager. If you select this option, the **Resource Manager Options** group box appears on the page. If date change approval is required, assignment date changes for a resource with an assignment status of *Assigned* require approval by the designated resource's approver. The system routes a worklist item to the approver. Until the date change is approved by the required approver, the new or changed assignment date rows have a status of *Pending,* and the pending dates appear on the assignment and the resource's schedule. The pending dates also carry over to the project team if you integrate with PeopleSoft Program Management. If an assignment date change is rejected, the dates for the assignment, resource schedule, and project team revert back to the pre-change assignment schedule. If the person making the date change is the approver, the system does not generate workflow.
Project Manager Approval Required	Select to require that assignment schedule changes be approved by the resource's project manager.
eMail Notification Options	Click to access the Assignments eMail Notification Options page and specify assignment notification options.

Resource Manager Options

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

> **Note**
>
> The system uses your selection for workflow routing. If resources are managed with resource pools, select **Pool Manager** instead of **Supervisor.**

Field or Control	Description
Pool Manager	Select if you want the pool manager to approve resource assignments.
Supervisor	Select if you want the resource's supervisor to approve resource assignments.

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Generic Resource Approval Options

Field or Control	Description
Generic Resource Approval required	Select **Pool Manager Approval required** to require that generic resource requests be approved by the resource's pool manager when the project manager requests a new generic resource from PeopleSoft Program Management. Until such approval occurs, the resource's status in Program Management cannot change to *Allocated.* Until the pool manager approves the generic resource request, the project manager cannot allocate generic resource capacity from that pool.
Date Change Approval required	Select **Pool Manager Approval required** to require that the resource's pool manager approve date changes when the project manager changes assignment dates in PeopleSoft Program Management for an allocated generic resource request. Until such approval occurs, the resource's status in Program Management cannot change to *Allocated.*
eMail Notification Options	Click to access the Generic Resource eMail Notification Options page and specify generic resource notification options.

> **Note**
>
> If you inactivate a resource pool, all pending and approved-pending fulfillment generic resource requests are canceled.

Assignments eMail Notification Options Page

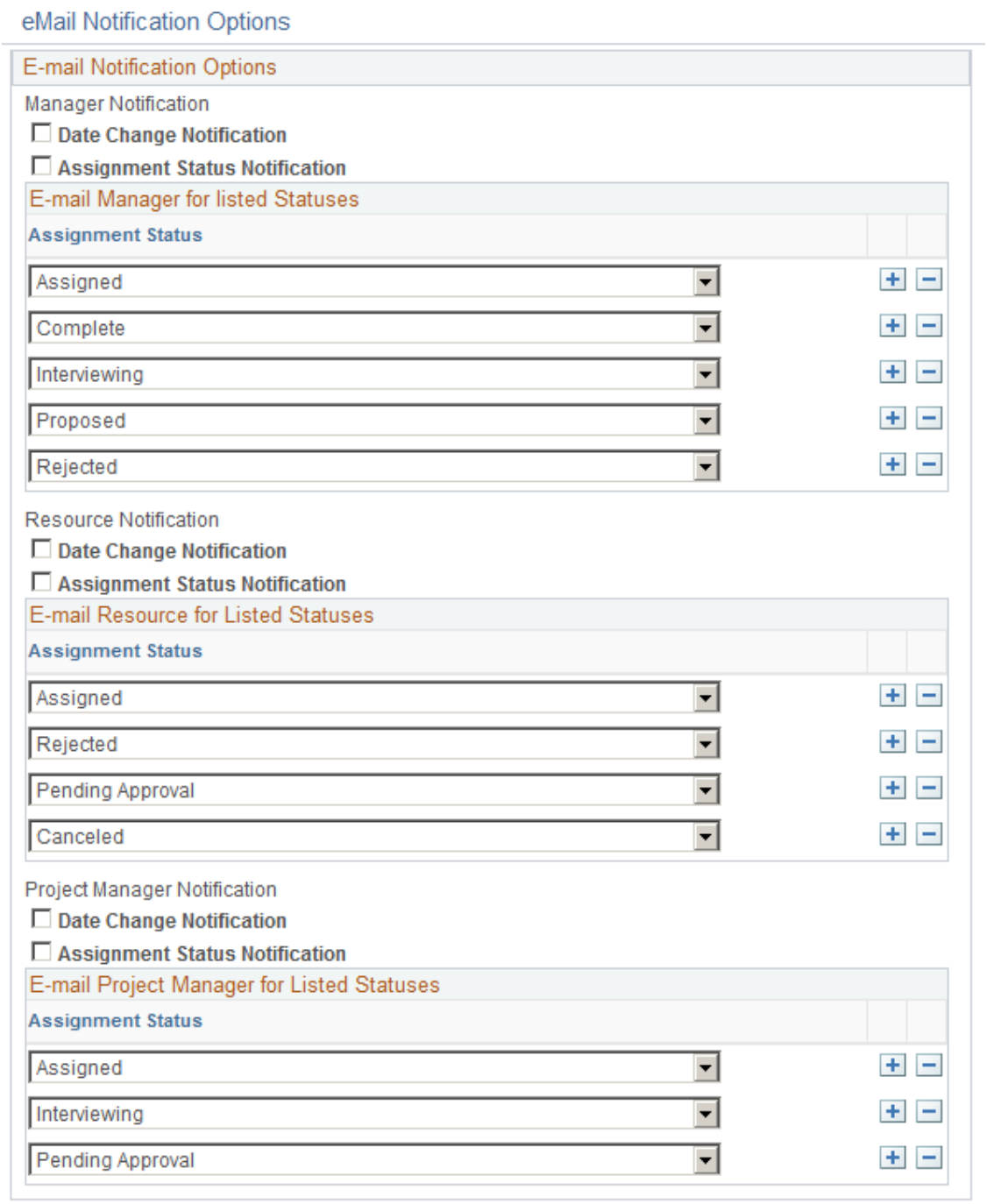
Use the Assignments eMail Notification Options page (RS_BUS_UNIT_NF_ASG) to specify the PeopleSoft Resource Management business unit options for assignment email notifications.

Navigation:

Click the **eMail Notification Options** link in the **Assignment Approval Options** group box on the Resource Management Options page.

This example illustrates the fields and controls on the Assignments eMail Notification Options page. You can find definitions for the fields and controls later on this page.

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eMail Notification Options

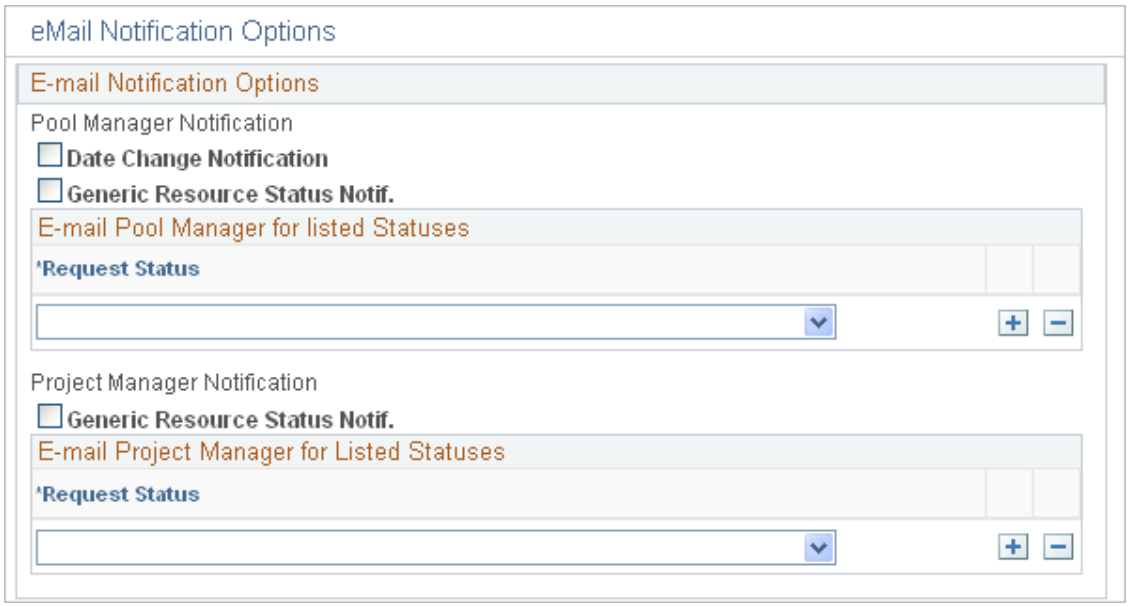
Field or Control	Description
Date Change Notification	Click to enable email notification to the resource's manager, the resource, and the project manager if a resource's assignment schedule changes.

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Field or Control	Description
Assignment Status Notification	Click to enable email notification to the resource's manager, the resource, and the project manager if a resource's assignment status changes.
E-mail Manager for listed Statuses	Add the assignment statuses for which the system sends email notifications to the resource's manager, the resource, and the project manager indicating that a resource's assignment status has changed.

Generic Resource eMail Notification Options Page

This example illustrates the fields and controls on the Generic Resource eMail Notification Options page. You can find definitions for the fields and controls later on this page.



eMail Notification Options

Field or Control	Description
Date Change Notification	Click to enable email notification to the pool manager if the generic resource request dates change.
Generic Resource Status Notif (generic resource status notification)	Click to enable email notification to the pool manager and project manager if the generic resource's status changes.
E-mail Pool Manager for listed Statuses and **E-mail Project Manager for listed Statuses**	Add the generic resource statuses for which the system sends email notifications to the pool manager and project manager indicating that a generic resource request's status has changed.

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Establishing HR Business Units Without PeopleSoft HCM

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

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

1. Define business units in PeopleSoft Project Costing.
2. Select the project business units to define as PeopleSoft Resource Management business units on the Resource Management Definition page.

   Assign a project integration template.
3. Specify PeopleSoft Resource Management business unit options on the Resource Management Options page.

Related Topics

- PeopleSoft Project Costing: Understanding Projects

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7

Defining the Organization by Using Trees

Understanding the Organizational Unit Tree Structure

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

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

You use the organizational unit tree to show that structure and:

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

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

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

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

1. Design the resource organization structure.
2. Select the organizational unit.
3. Determine the organizational unit field and record.
4. Determine if an existing tree can serve as the organizational unit tree, or create a new organizational unit tree.
5. (Optional) Provide access to the tree across business units.

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

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Related Topics

- Understanding Resource Pools
  Organizations can have hundreds to thousands of resources that make up the supply side of the capacity planning model. Resource pools provide a mechanism to organize supply in a meaningful way to support capacity planning. You can group resources in any configuration to support your operations.

Department Organizational Unit Trees

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

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

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

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

1. Export the tree from the HCM database.
2. Import the tree in the Financials database.

Non-Department Organizational Unit Trees

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

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

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

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

Use one of the fields on the Job record (JOB) to map organizational units to resources. The Job record contains the PeopleSoft HCM data for department, location, job code, and a variety of other attributes for every employee in the organization.

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

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

If none of the fields in the Job record can map organizational units to resources, you can use any record and field to organize the resources.

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

Additional Setup Steps for Non-department Organizational Unit Trees

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

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

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

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

Creating and Sharing the Organizational Unit Tree

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

Pages Used to Create and Share the Organizational Unit Tree

Page Name	Definition Name	Usage
Structure - Tree Structure Properties	PSTREESTRCTDEFN	Specify the tree type, key fields, and navigation options.
Nodes - Tree Nodes	PSTREESTRCTNODE	Specify the page and record used to enter and store information about tree nodes.

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Page Name	Definition Name	Usage
Details - Tree Details	PSTREESTRCTDETL	For detail trees, specify the page and record used to enter and store detail information. This page is not used for node-only trees.
Tree Definition and Properties	PSTREEDEFN	Specify general attributes for a tree.
Enter Root Node for Tree	PSTREEROOTLEVELS	Define the root node.
TableSet Control - Tree	SET_CNTRL_TABLE2	Associate specific trees with a set control value.
Tree Manager	PSTREEMGR	View or modify existing trees.

Creating the Tree Structure and Defining and Sharing the Tree

Follow these steps to create a new organizational tree:

1. Create the tree structure.

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

   You can select **SetID Indirection** as an additional key field to use the SetID to share the organizational unit tree definition across business units.
2. Define the tree.
3. Specify the root node.
4. Insert the tree nodes that define the hierarchy of the tree.
5. Attach detail values as *leaves* on the nodes for a detail-value (summer) tree.
6. Share the tree across business units.

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

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

   To share the tree across business units, access the TableSet Control component (SET_CNTRL_TABLE1) and select a business unit value that uses the organizational unit tree. Access the TableSet Control - Tree page and enter the organizational unit tree name and tree SetID in the **Tree Controls** grid.

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

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

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Configuring NonDepartment Organizational Units

This topic discusses how to configure nondepartment organization units.

Page Used to Configure NonDepartment Organizational Units

Page Name	Definition Name	Usage
Installation Options - Resource Management Page	INSTALLATION_RS	Modify the organization field name, unit record, tree name, or employee organization record name as required. Application Fundamentals: Defining Resource Management Installation Options

Identifying or Creating a Valid Employee - Organization Record

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

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

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

  This is required if the organizational unit record is keyed by SetID, such as the Departments record (DEPT_TBL). Some organizational units, such as supervisor ID, may not have an organizational unit record that is keyed by SetID.
- The record contains rows for all resources.

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

- Employee Record Number field (EMPL_RCD)

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

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

- Effective Sequence Number (EFFSEQ)

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

The record must not contain any other key fields.

Modifying the Organization Structure Definition

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

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

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

Organizational Unit Field Name

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

Modifying SQL Definitions with the Organizational Unit Field

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

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

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

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

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

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

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Modifying PeopleCode with the Organizational Unit Field

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

- Modify the RS_INSTALL_WRK.FIND_OBJECTS_PB.FieldChange PeopleCode program. Change the first parameter in the function call *resolve_wildcard( )* from *Field.DESCR* to the field name that stores the organizational unit's title, description, or name.
- Modify the function *ManageTree( )* function in the FUNCLIB_RS.TREE_NAME.FieldFormula PeopleCode program. Change the field name in this line of code—`&NodeDescr = &DtlDescrRec.DESCR.Value;`—from *DESCR* to the field name that stores organizational unit name values. For example, if the NAME field is used to store organizational unit names, because the organizational unit is Supervisor ID, the code is `&NodeDescr = &DtlDescrRec.GetField(Field.NAME).value`.

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8

Understanding Access-Related Features of PeopleSoft Resource Management

Permission Lists

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

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

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

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

Permission List	Description	Purpose	Roles
EPRS1000	Resource Management All Users	Provides access to the graphical navigation provided via the PeopleSoft Resource Management standard navigation page and PeopleSoft Workflow worklist. Provides access to Search Index Agent Manager component. Provides access to component interfaces and web libraries.	All PeopleSoft Resource Management Users

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Permission List	Description	Purpose	Roles
EPRS2100	RS Service Order Management	Provides user with create and update access to service order, customer maintenance, and service order defaults pages.	Staffing Coordinator, Practice Manager, Project Manager
EPRS2300	RS Service Order Review Orders	Provides view-only access to users to review service orders and regular access to change their default settings for service orders.	Resource, Resource Manager
EPRS3000	RS Assignments	Enables users to create and manage assignments.	Staffing Coordinator, Practice Manager, Project Manager
EPRS4100	RS Schedules Managers View	Enables users in managerial roles to access other users' schedules.	Resource Manager, Practice Manager
EPRS4200	RS Schedules Resource View	Enables users to access only their own schedules for review and update.	Resource
EPRS4300	RS Schedules Display Only	Enables users to view but not update resource schedules.	Project Manager, Staffing Coordinator
EPRS5100	RS Worker	Enables resources to review and bid on open resource requests and to update and manage their own resource profiles.	Resource
EPRS5200	RS Worker Manager	Enables managers to review resource profiles, submit recommendations, and work with assignments.	Resource Manager, Practice Manager
EPRS5300	RS Worker Display Only	Allows view-only access to resource profiles.	Project Manager, Staffing Coordinator
EPRS6000	RS Pagelets	Allows access to PeopleSoft Portal Pack pagelets that come with PeopleSoft Resource Management.	Resource Manager, Practice Manager, Staffing Coordinator

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Permission List	Description	Purpose	Roles
EPRS7000	RS Without HCM	Enables the use of PeopleSoft Resource Management without integrating with PeopleSoft Human Capital (PeopleSoft HCM).	Administrator **Note:** The Administrator role is not directly associated with this permission list because administrators can access all pages using the ALLPAGES permission list.
EPRS7100	RS Interactive Reports	Enables users to run PeopleSoft Resource Management reports that show trend information, such as the Scheduled Utilization report, the Unassigned Resources report, and the Most Requested Competencies report.	Project Manager, Resource Manager, Staffing Coordinator, Practice Manager
EPRS7200	RS Operational Reports	Enables operations users to run reports that are applicable to managing the day-to-day operations of a professional services organization, such as the Service Order Listing report and the Assignments Ending report.	Project Manager, Resource Manager, Staffing Coordinator, Practice Manager
EPRS9000	Resource Management Setup	Enables users to set up or change installation options and preferences.	Administrator **Note:** The Administrator role is not directly associated with this permission list because administrators can access all pages using the ALLPAGES permission list.
EPRS9100	Resource Management BU (business unit) Setup	Enables users to set up business rules and preferences.	Administrator **Note:** The Administrator role is not directly associated with this permission list because administrators can access all pages using the ALLPAGES permission list.

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Permission List	Description	Purpose	Roles
EPRS9400	Capacity Planning	Enables users to create supply and demand forecasts, and create, modify, and approve consolidated scenario analyses.	Resource Manager
EPRS9500	Capacity Planning with Approvals	Enables users to create supply and demand forecasts, and create, modify, approve, and unapprove consolidated scenario analyses.	Practice Manager
EPRS9600	Region Utilization Setup	Enables users to set up the utilization values for the regions used in capacity planning.	Practice Manager

Component Interface Permissions

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

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

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

See PeopleSoft Enterprise Integration Technologies.

Component Interfaces Used by PeopleSoft Resource Management

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

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

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Component Interface	Description	Purpose
FACTOR	Resource Management Factors	Assigns a new factor ID to newly created factors and includes the factor in forward and reverse searches.
PROJECT_GENERAL	Create Project	Creates a new project (either using auto-numbering or using a specified project ID) from a service order, using the business unit on the service order for the project.
RESOURCE_PROFILE	Resource Profile	Updates or deletes the work history on the resource profile.
RS_ASSIGN_BC	Create and Get Assignment	Creates an assignment using *NEXT* as the assignment ID until the assignment is saved. At that time, the assignment is auto-numbered. Retrieves an existing assignment for modification. This component interface is used by the Staffing Workbench and integration with PeopleSoft Program Management, Project Costing, Maintenance Management, and Services Procurement.
RS_BLDSCPFND	Populate Scope Table	Uses a list of tree nodes or detail values to determine the data that populates the Scope table (RS_DF_SCOPE_W). This is used only for PeopleSoft Resource Management reports.
RS_CLEARSESNID	Clear Scope Table	Takes a session ID and clears the Scope table.
RS_CONV_PERSON	Convert Person to Resource	Converts PeopleSoft Services Procurement service providers to resources.
RS_GRR_APPRVL	Generic Resource Request	Creates generic resource requests in PeopleSoft Program Management.
RS_LOAD_EXT_DMD	Load External Demand Data	Used as an interface to import external demand data from Microsoft Excel.
RS_REPORT_TBL_INTFC	Manage Report Temp Table	Inserts information or deletes information from the temporary reporting table RS_2010EMPL_TMP.

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Component Interface	Description	Purpose
RS_SCHEDULE_CI	Resource Management Schedule	Creates a new appointment using *NEXT* as the new appointment ID (auto-numbered). Retrieves an existing appointment for modification. This component interface is also used to create and update assignment entries on the resource schedule.
RS_SERVICE_ORDER	Service Order Save As	Saves the existing service order as a new service order with the *NEXT* service order ID (auto-numbered). The system copies data from the existing service order into the new service order.
RS_SO_TMPLT	Service Order Template	Creates service orders from the service order template.
RS_WRKR_CREATE	Establish Employee as Resource	Establishes an employee as a resource. This is used in the integration with PeopleSoft Services Procurement when converting a service provider to a resource.
RS_WRKR_MGMT	Maintain Resource Eligibility	Manages dates of resource eligibility that are used in the integration with PeopleSoft Services Procurement when creating an assignment for a service provider.

Component Interfaces Used by Server Processes

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

Component Interface	Description	Purpose
RS_BLDSCPFND	Populate Scope Table	Uses a list of tree nodes or detail values to determine the data that populates the Scope table (RS_DF_SCOPE_W). This is used only for PeopleSoft Resource Management reports.
RS_CLEARSESNID	Clear Scope Table	Takes a session ID and clears the Scope table.

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Component Interface	Description	Purpose
RS_SCHEDULE_CI	Resource Management Schedule	Creates a new appointment using *NEXT* as the new appointment ID (auto-numbered). Retrieves an existing appointment for modification. This component interface is also used to create and update assignment entries on the resource schedule.

Row-Level Security

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

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

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

User Profiles and Roles

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

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

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

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

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

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

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

Note

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

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9

Setting Up PeopleSoft Resource Management with PeopleSoft HCM

Understanding PeopleSoft Resource Management and PeopleSoft HCM

PeopleSoft Resource Management integrates with the Manage Profiles business processes in PeopleSoft HCM. The integration between the HCM database and the Financials database requires careful planning before you design and implement configurations in both databases. Key data records exist in both databases, and they are maintained asynchronously using application messages.

This section lists prerequisites and discusses:

- PeopleSoft HCM content catalog.
- Resource profiles.
- Data synchronization with the employee source database.
- The Competency tree.

Prerequisites

This section lists prerequisites for integrating with PeopleSoft HCM:

- Install PeopleSoft HCM 8 or later.
- On the Resource Setup - Common Installation Options page, select one of these options as the employee source database:
  - PeopleSoft HCM 8.0+

    Select this option to maintain employee and non-employee source data only in PeopleSoft HCM.
  - PeopleSoft HCM 8.0+ and Financials Database

    Select this option to maintain employee data records in PeopleSoft HCM, and non-employee data records in HCM and Financials databases.
- Activate the Publication and Subscription services on the Financials database and HCM application servers.
- Activate the data synchronization application messages.

If you use PeopleSoft HCM Profile Management:

- Add content items for these content types in PeopleSoft HCM if they are not already defined in the HCM database:
  - Competencies
  - Degrees

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  - Languages
  - Licenses and certificates
  - Professional memberships
  - Honors and awards
  - Test results
- Establish resource setup data in PeopleSoft HCM if it is not already defined in the HCM database.
- Grant users access to the HCM database to maintain resource setup data.

> **Note**
>
> If you maintain non-employee data in either PeopleSoft HCM or PeopleSoft Resource Management, any new non-employee record that is created in Resource Management must be maintained in Resource Management. Any new non-employee record that is created in PeopleSoft HCM must be maintained in PeopleSoft HCM.
>
> See the product documentation for*PeopleTools: System and Server Administration* and *PeopleTools: Application Designer Developer's Guide*

PeopleSoft HCM Content Catalog

In PeopleSoft HCM, the content catalog is the source of competencies and other qualifications. In the content catalog, you define different types of information as content types, and set up the data for each content type as content items. PeopleSoft HCM delivers a set of common content types such as competencies, language skills, degrees, licenses, and memberships.

Resource Profiles

Resource profiles are derived in part from information maintained in the employee source database. The HCM database tables that store resource profile values are discussed in a subsequent topic in this documentation.

When you update competencies, degrees, languages, licenses, professional memberships, honors, and tests that are stored in PeopleSoft HCM from the resource profile in PeopleSoft Resource Management, access to the HCM database is achieved through the Single Sign-on feature.

Related Topics

- Resource Profile Design
  Personal data and qualification information is maintained in the employee source database. If you integrate with Human Capital Management (PeopleSoft HCM) and you select a link to update qualification information that is stored in the employee source database, you access the appropriate PeopleSoft HCM pages by using the Single Signon feature. The information in PeopleSoft Resource Management data tables is updated in near real time.

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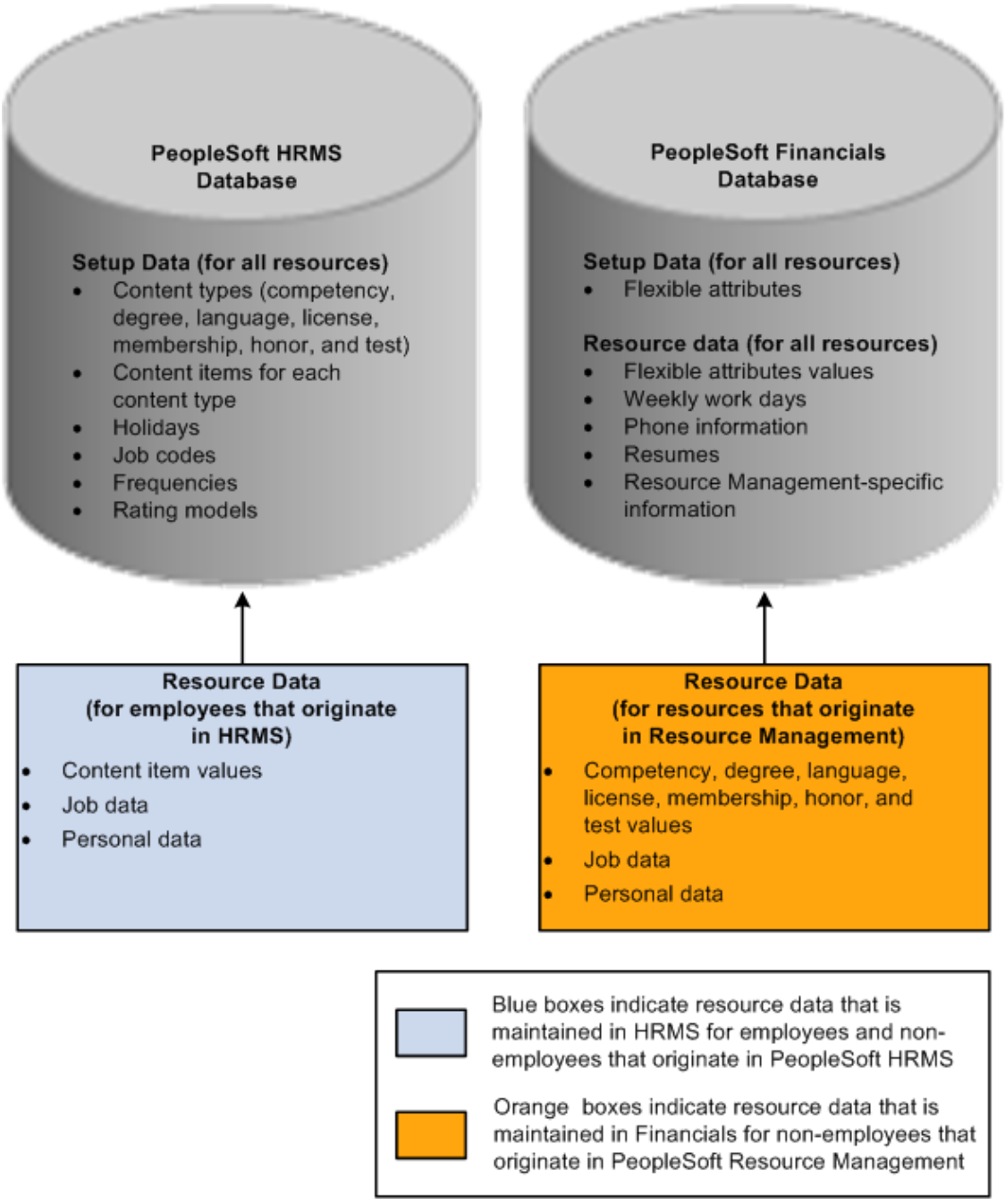
Data Synchronization with the Employee Source Database

If you maintain employee and non-employee data in PeopleSoft HCM only, the full synchronization process updates the resource setup data in PeopleSoft Resource Management with information from PeopleSoft HCM.

If you maintain non-employees in the HCM and Financials databases, the full synchronization process does not update non-employee data for employee IDs that originate in PeopleSoft Resource Management. In this case, the process updates only employee and non-employee data that originates in PeopleSoft HCM.

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

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

- View and modify resource setup data.

  For employees and non-employees who originate in PeopleSoft HCM, the system transfers you to the HCM database to modify the data. You can update and save qualification data in the Person Profile component (JPM_PERSON_PROFILE) in the PeopleSoft HCM system and return to the resource profile in PeopleSoft Resource Management.

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

- Establish resources and maintain eligibility.

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

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

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

The Competency Tree

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

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

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

> **Important**
>
> You can export the Competency tree that exists in the HCM database and import it into the Financials database. Alternatively, you can create your own Competency tree in the Financials database. The tree must be named *COMPETENCY* and use the structure ID named *COMPETENCY.*

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

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

To determine how frequently to update the tree:

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

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

See the product documentation for *PeopleTools: Tree Manager*

Updating PeopleSoft HCM Permission Lists and Roles

This topic provides a list of components used in PeopleSoft HCM 9.1 by PeopleSoft Resource Management.

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

Purpose	Typical Users	Menu	Component
Maintain resource competencies.	Resource	ROLE_EMPLOYEE	JPM_PERS_PROFL_EMP
	Resource Manager Practice Manager	SETUP_PROFILE_MANAGEMENT	JPM_PERSON_PROFILE
Set up competencies.	Administrator Competencies Setup Administrator Competency Types Setup Administrator	SETUP_HRMS SETUP_JPM_CATALOG	RATING_MDL_TBL JPM_CAT_ITEMS JPM_CAT_GROUPS
Maintain resource education.	Resource	ROLE_EMPLOYEE	JPM_PERS_PROFL_EMP
	Resource Manager Practice Manager	SETUP_PROFILE_MANAGEMENT	JPM_PERSON_PROFILE
Set up education.	Administrator School Setup Administrator School Types Setup Administrator Degree Setup Administrator	SETUP_JPM_CATALOG SETUP_HRMS	JPM_CAT_ITEMS SCHOOL_TABLE SCHOOL_TYPE_TABLE MAJOR_TABLE
Maintain resource honors and awards.	Resource	ROLE_EMPLOYEE	JPM_PERS_PROFL_EMP
	Resource Manager Practice Manager	SETUP_PROFILE_MANAGEMENT	JPM_PERSON_PROFILE
Set up honors and awards.	Administrator	SETUP_JPM_CATALOG	JPM_CAT_ITEMS
Maintain resource languages.	Resource	ROLE_EMPLOYEE	JPM_PERS_PROFL_EMP
	Resource Manager Practice Manager	SETUP_PROFILE_MANAGEMENT	JPM_PERSON_PROFILE
Set up languages.	Administrator	SETUP_JPM_CATALOG	JPM_CAT_ITEMS
Maintain resource licenses.	Resource	ROLE_EMPLOYEE	JPM_PERS_PROFL_EMP

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Purpose	Typical Users	Menu	Component
	Resource Manager Practice Manager	SETUP_PROFILE_MANAGEMENT	JPM_PERSON_PROFILE
Set up licenses.	Administrator	SETUP_JPM_CATALOG	JPM_CAT_ITEMS
Maintain resource memberships.	Resource	ROLE_EMPLOYEE	JPM_PERS_PROFL_EMP
	Resource Manager Practice Manager	SETUP_PROFILE_MANAGEMENT	JPM_PERSON_PROFILE
Set up memberships.	Administrator	SETUP_JPM_CATALOG	JPM_CAT_ITEMS
Set up tests and results.	Administrator	SETUP_JPM_CATALOG	JPM_CAT_ITEMS

Activating the Single Signon Feature

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

This section discusses:

- Activating the Single Signon feature for PeopleSoft HCM systems that use PeopleTools 8.4x, such as PeopleSoft HCM 8.8, 8.9, and 9.0.
- Activating the Single Signon feature for PeopleSoft HCM 8.3.

Activating the Single Signon Feature for PeopleSoft HCM Systems That use PeopleTools 8.4x

These are the basic steps to activate the Single Signon feature if you integrate with PeopleSoft HCM 8.8, 8.9, and 9.0:

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

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

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

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

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> **Important**
>
> You must specify the same PeopleSoft HCM and PeopleSoft Resource Management message node names in both databases.

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

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

   c. Select *PIA* as the node type on the Node Definitions page.

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

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

See *PeopleTools : Security Administration,* "Implementing Single Signon."

Activating the Single Signon Feature for PeopleSoft HCM 8.3

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

- The HCM database URI has the following format:

  http://<webservermachinename>/servlets/iclientservlet/<domain name>/

- The node type is *ICType.*

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Setting Up PeopleSoft Resource Management Without an Integrated HCM

Understanding PeopleSoft Resource Management Without PeopleSoft HCM

This section lists a prerequisite and discusses resource profiles.

Prerequisite

On the Resource Setup - Common Installation Options page, select *PeopleSoft Financials Database* as the source for employee and non-employee data. This selection enables the processing rules for PeopleSoft Resource Management to serve as the employee data source.

> **Note**
>
> If you use PeopleSoft HCM 8.0 or higher, take advantage of the built-in integration with PeopleSoft Resource Management to manage resources and resource competencies. PeopleSoft Resource Management uses enterprise integration points to request and send data between the Financials database (where Resource Management information resides) and the HCM database (where employee and competency information resides).

Related Topics

- Application Fundamentals: Setting Up Resources

Resource Profiles

Resource profile information is maintained in the Financials database if you do not use PeopleSoft HCM. The Financials database tables that store resource profile values are discussed in a subsequent topic in this documentation.

Related Topics

- Resource Profile Design
  Personal data and qualification information is maintained in the employee source database. If you integrate with Human Capital Management (PeopleSoft HCM) and you select a link to update qualification information that is stored in the employee source database, you access the appropriate PeopleSoft HCM pages by using the Single Signon feature. The information in PeopleSoft Resource Management data tables is updated in near real time.

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Understanding Application Setup and Employee Data Tables

This section discusses:

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

Steps for Employee Data Source Implementation

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

1. Complete application setup tables for each resource qualification that you track:
    a. Degrees
    b. Honors and awards
    c. Languages
    d. Licenses and certifications
    e. Majors
    f. Memberships
    g. Schools
    h. Tests
    i. Competencies
    j. Competency types
    k. Competency rating models
2. Complete application setup tables for other work definitions:
    a. Frequency
    b. Holidays
    c. Job codes
3. Establish employee data.

Qualifications

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

These are seven types of qualifications:

- Education (including degrees, majors, and schools).

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- Honors and awards.
- Languages.
- Licenses and certifications.
- Memberships.
- Tests.
- Competencies.

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

Competencies

A competency is another type of qualification. Competencies encompass skills, abilities, knowledge, or behavior, such as experience with office equipment, knowledge of special manufacturing processes, or a background in financial planning. Unlike other qualification types, competencies are measured or evaluated using a rating model that you define.

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

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

> **Note**
>
> Competency effective dating logic is not used for resources that are managed in PeopleSoft Resource Management.

Competency Rating Models

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

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

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

The Competency Tree

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

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

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

See the product documentation for *PeopleTools: Tree Manager*

Work Definition Tables

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

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

Frequencies

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

Employee Data Tables

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

The employee data tables consist of:

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

> **Important**
>
> You can maintain non-employee data in either the HCM or the Financials database. However, any new employee ID (EMPLID) for a non-employee that is created in PeopleSoft Resource Management must be maintained in Resource Management, and any new employee ID for a non-employee that is created in PeopleSoft HCM must be maintained in PeopleSoft HCM.

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

Related Topics

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

Establishing Application Setup Tables for Qualifications

This topic discusses how to set up resource qualification tables.

Pages Used to Establish Application Setup Tables for Qualifications

Page Name	Definition Name	Usage
PeopleSoft Staffing Front Office: Degree Page	RS_CM_DEGREE_TBL	Establish the code and definition of degrees to be used when matching resources to assignments.
Honor/Award	RS_CM_AWARD_TBL	Establish the code and definition of honors or awards.
Language	RS_CM_LANG_TBL	Establish the code and definition of languages to be used when matching resources to assignments.
License/Certificate	RS_CM_LIC_CERT_TBL	Establish the code and definition of licenses or certifications to be used when matching resources to assignments.

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Page Name	Definition Name	Usage
PeopleSoft Staffing Front Office: Major Page	RS_CM_MAJOR_TBL	Establish the code and definition of majors to be used when matching resources to assignments.
Membership	RS_CM_MEMBR_TBL	Establish the code and definition of memberships to be used when matching resources to assignments.
School	RS_CM_SCHOOL_TBL	Establish the code and definition of schools to be used when matching resources to assignments.
PeopleSoft Staffing Front Office: Test Page	RS_CM_TEST_TBL	Establish the code and definition of test results.

Setting Up Resource Qualification Tables

You can set up qualifications tables for these resources:

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

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

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

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

Establishing Application Setup Tables for Competencies

Unlike other qualifications, to track resource competencies you must set up competency types, competencies, and a competency rating model.

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

This topic discusses how to set up resource competency tables.

Pages Used to Establish Application Setup Tables for Competencies

Page Name	Definition Name	Usage
Competency Page	RS_CM_COMPTNCY_TBL	Define skills, abilities, knowledge, or behaviors pertinent to jobs in the organization.
Competency Type	RS_CM_TYPE_TBL	Create competency types or broad categories of competencies relevant to particular positions or projects. You must define competency types to build and maintain a Competency tree.
Rating Model	RS_CM_REVW_RAT_TBL	Define a set of alphanumeric codes for ranking an employee's degree of expertise or experience in a competency.

Setting Up Resource Competency Tables

Define each competency table by completing these steps:

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

Organizing Competencies Using a Competency Tree

This topic discusses how to organize competencies using a Competency tree.

Page Used to Organize Competencies Using a Competency Tree

Page Name	Definition Name	Usage
Tree Manager	PSTREEMGR	View and update a Competency tree.

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Using a Competency Tree to Organize Competencies

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

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

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

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

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

See *PeopleTools : PeopleSoft Tree Manager.*

Establishing Application Setup Tables for Work Definitions

This topic discusses how to set up work definition tables.

Pages Used to Establish Application Setup Tables for Work Definitions

Page Name	Definition Name	Usage
PeopleSoft Staffing Front Office: Frequency Setup Page	RS_CM_FREQNCY_TBL	Define a frequency ID, its frequency type (such as annual, monthly, weekly, biweekly, bimonthly, daily, or hourly), and its annualization factor (how many frequency periods occur in one year).
Holiday Schedule	RS_CM_HOLIDAY_TBL	Identify the holidays observed by the organization.
PeopleSoft Staffing Front Office: Job Code Definition Page	RS_CM_JOBCODE_TBL	Establish a code for each job that a resource holds in the organization. Job codes can be alphanumeric.

Setting Up Work Definition Tables

Define each work definition table by completing these steps:

1. Access the setup table page.
2. Enter a new or existing code for the work definition.
3. Enter or update the description and other required fields for the code.

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4. Save the record and click **Add** to create the next code and definition.

Creating Employee Data

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

Define employee data tables by completing these steps:

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

Pages Used to Create Employee Data

Page Name	Definition Name	Usage
Update Employee Data: Personal Data Page	RS_CM_PERSONL_DATA	Specify name, address, telephone, and personnel status information for an employee ID.
Update Employee Data - Employee Job Page	RS_CM_EMPL_JOB	Specify employee status and other basic job information such as department, location, and supervisor.
Update Employee Data - Visa/ Work Permit Page	RS_CM_VISA_PRMT	Specify visa and work permit information.
Update Employee Data - Citizenship/Passport page	RS_CM_CITI_PASS	Specify citizenship and passport information.

Update Employee Data: Personal Data Page

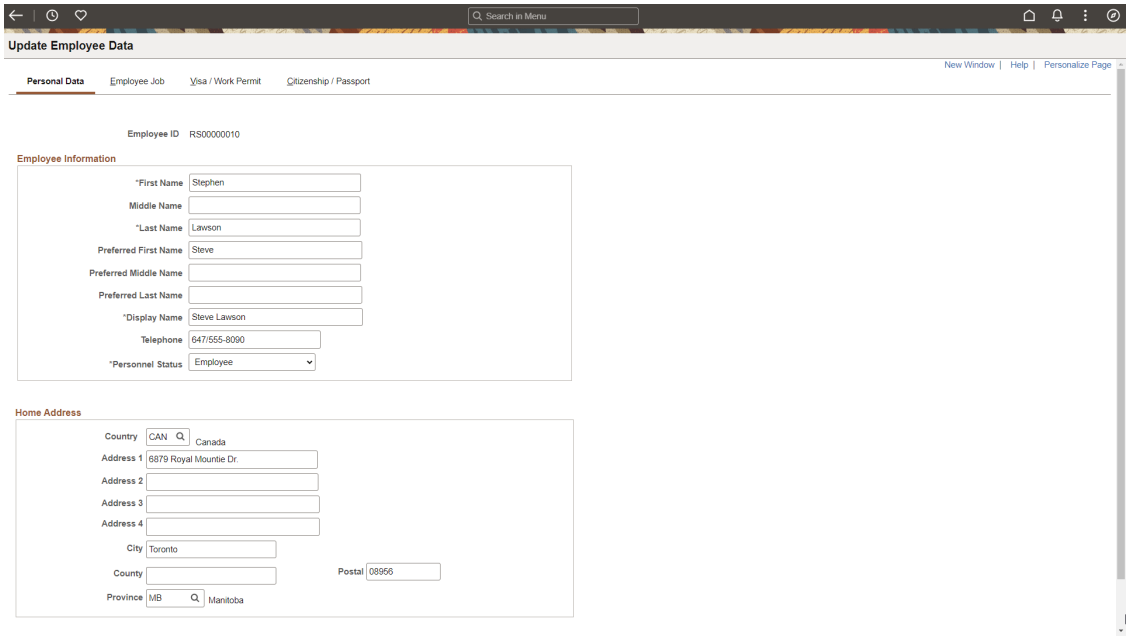
Use the Update Employee Data - Personal Data page (RS_CM_PERSONL_DATA) to specify name, address, telephone, and personnel status information for an employee ID.

Navigation:

Resource Management, and then **Establish Resources**, and then **Update Employee Data**, and then **Personal Data**

This example illustrates the fields and controls on the Update Employee Data: Personal Data page.

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If the employee data comes from PeopleSoft Human Capital Management (HCM) the information is display-only.

Field or Control	Description
Preferred First Name, Preferred Middle Name, and **Preferred Last Name**	See field definition on the Application Fundamentals: Personal Data (Edit) Page (Common Definitions).
Display Name	See field definition on the Application Fundamentals: Personal Data (Edit) Page (Common Definitions).
Personnel Status	Select *Employee* or *Non-Employee*. **Note:** Personal data records with the personnel status *Non-Employee* appear on the Employee Data page even if you do not allow non-employees to be established as resources.
Person Type	Select a value to further classify a non-employee. This field appears only for records with the personnel status *Non-Employee*, and it is used for information only in PeopleSoft Resource Management. Available values are based on the translate values in the Person Type field (PER_TYPE) properties.

Update Employee Data: Employee Job Page

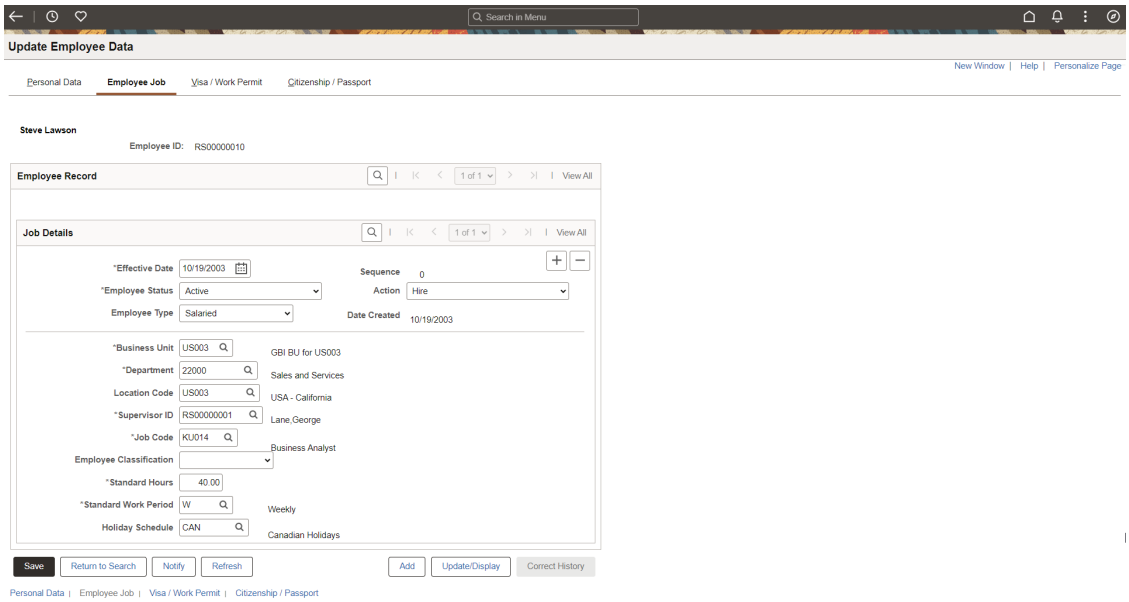
Use the Update Employee Data - Employee Job page (RS_CM_EMPL_JOB) to specify employee status and other basic job information such as department, location, and supervisor.

Navigation:

Resource Management, and then **Establish Resources**, and then **Update Employee Data**, and then **Employee Job**

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This example illustrates the fields and controls on the Update Employee Data: Employee Job page.



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

See Setting Up and Maintaining the Search Framework and Resource Matching Cache Tables.

Field or Control	Description
Effective Date	Displays the system-assigned effective date. The system assigns the system date when new job information is entered.
Sequence	Displays the system-assigned sequence number. The system assigns the next available sequence number for the effective date. This is a record key that is used for system processing.
Employee Status	Enter the employee's status. Available values are based on the translate values in the Employee Status field (EMPL_STATUS) properties. **Note:** Resources must have an employee status value of *Active* to be eligible for staffing in PeopleSoft Resource Management. If a resource has any employee status other than active, you can view—but not change—the resource's eligibility.

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Field or Control	Description
Action	Enter the action that is taken for the employee. In PeopleSoft Resource Management, this field is used for information only. Available values are based on the translate values in the Employee Action field (ACTION) properties.
Employee Type	Enter the type of employee. In PeopleSoft Resource Management, this field is used for information only. Available values are based on the translate values in the Employee Type field (EMPL_TYPE) properties.
Business Unit	Enter the human capital business unit for the employee or non-employee. This is a required field. Available values are based on the Business Unit field (BUSINESS_UNIT) in the HR Business Unit record (BUS_UNIT_TBL_HR).
Department	Enter the employee's department. This field is required. Available values are based on the Department field (DEPTID) in the Departments record (DEPT_TBL).
Location Code	Enter the employee's work location. In PeopleSoft Resource Management, this field is used for information only. Available values are based on the Location field (LOCATION) in the Location record (LOCATION_TBL).
Supervisor ID	Enter the employee's supervisor or manager. Available values are based on the Employee ID field (EMPLID) in the Personal Data record (PERSONAL_DATA). You must enter a supervisor for all resources before you can use these features: • Resource groups that are based on supervisor ID. • Assignment approval workflow. • Assignment status change notification workflow. • Assignment schedule change notification workflow. • Email notifications with comments regarding an assignment from a resource to the resource manager. You must enter a value in this field if PeopleSoft Program Management is installed.
Job Code	Enter the employee's job code. You can use this field to determine a resource's bill rate. Available values are based on the Job Code field (JOBCODE) in the Job Code record (JOBCODE_TBL). You must enter a value in this field if PeopleSoft Program Management is installed.
Employee Classification	Enter the employee's work classification. In PeopleSoft Resource Management, this field is used for information only. Available values are based on the translate values in the Employee Classification field (EMPL_CLASS) properties.

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Field or Control	Description
Standard Hours	Enter the employee's standard work hours. This value is used by the Resource Matching algorithm and in various PeopleSoft Resource Management interactive reports to calculate and report availability. You must enter a value in this field if PeopleSoft Program Management is installed.
Standard Work Period	Enter the employee's standard work period. This value is used by the Resource Matching algorithm and in various PeopleSoft Resource Management analyses to calculate and report availability. Available values are based on the Standard Work Period field (STD_HRS_FREQUENCY) in the Frequency record (FREQUENCY_TBL). You must enter a value in this field if PeopleSoft Program Management is installed.
Holiday Schedule	Enter the employee's holiday schedule. Available values are based on the Holiday Schedule field (HOLIDAY_SCHEDULE) in the Holiday table (RS_HOLIDAY_TBL).

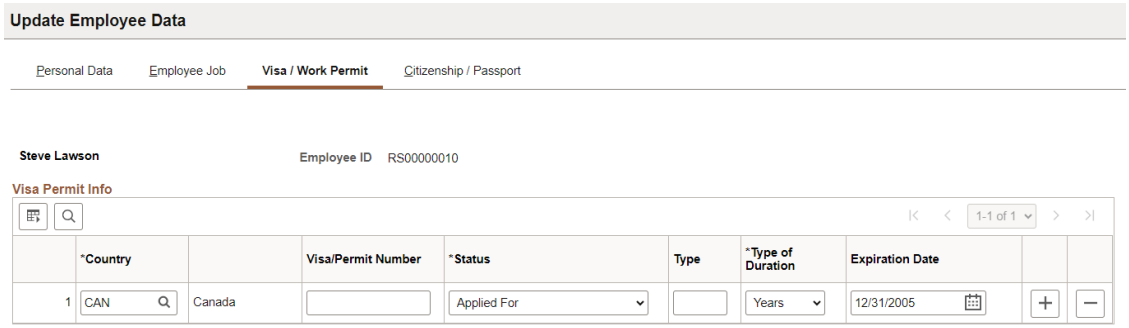
Update Employee Data - Visa/Work Permit Page

Use the Update Employee Data - Visa/Work Permit page (RS_CM_VISA_PRMT) to specify visa and work permit information.

Navigation:

Resource Management, and then **Establish Resources**, and then **Update Employee Data**, and then **Visa / Work Permit**

This example illustrates the fields and controls on the Update Employee Data - Visa/Work Permit page.



Enter the applicable information for each field.

Update Employee Data - Citizenship/Passport page

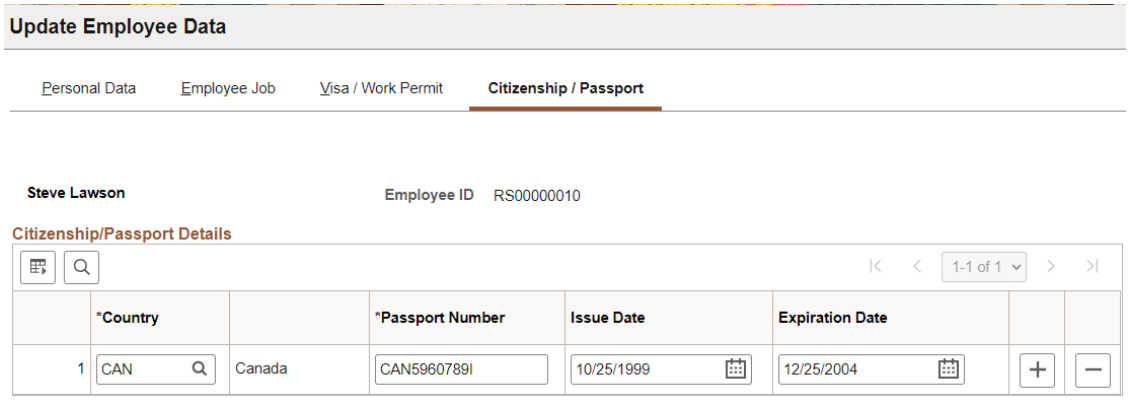
Use the Update Employee Data - Citizenship/Passport page (RS_CM_CITI_PASS) to specify citizenship and passport information.

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Navigation:

Resource Management, and then **Establish Resources**, and then **Update Employee Data**, and then **Citizenship / Passport**

This example illustrates the fields and controls on the Update Employee Data - Citizenship/ Passport page.



Enter the applicable citizenship and passport information for each field.

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11

Understanding EIPs

PeopleSoft Enterprise Integration Technologies

EIPs use a variety of PeopleSoft integration tools to integrate data across an enterprise. The *PeopleSoft Components for PeopleSoft Financial Management Solutions, Enterprise Service Automation, Asset Lifecycle Management, and Supply Chain Management 91 documentation* is a good resource for EIPs, including information about development tools and techniques.

This section discusses:

- Application messages.
- Component interfaces.
- Business interlinks.

Application Messages

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

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

- Incremental synchronization messages.

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

- Full synchronization messages.

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

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

Although application messaging is described as the tool for publishing data from a source database to a target database, you can also use it to publish and subscribe to a data change within the same database. PeopleSoft Resource Management also uses application messages to trigger the calculation of Availability fit scores by Resource Matching. The application messages that are used by Resource Matching are discussed earlier in this documentation.

Related Topics

- Establishing Resource Groups
  To establish resource groups, use the Resource Groups component (RS_RESOURCE_GROUPS).

Component Interfaces

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

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

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

You can use component interfaces to integrate with external applications. The component interfaces that are used in PeopleSoft Resource Management are discussed earlier in this documentation.

See Permission Lists.

Application Message Subscriptions that Integrate with PeopleSoft HCM

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

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PeopleSoft HCM data is subject to continuous change, application messages provide the vehicle to keep the data current across the enterprise.

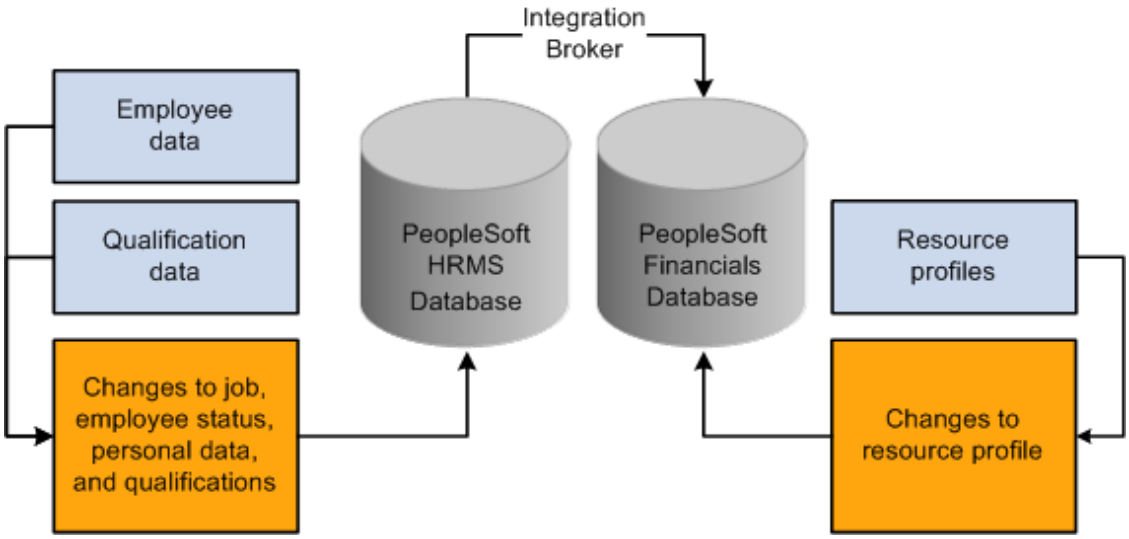
This section discusses:

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

Shared Data Between PeopleSoft HCM and PeopleSoft Resource Management

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

This diagram illustrates the data-sharing process:



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

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

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

Incremental Synchronization Messages

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

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

Bidirectional, Incremental Messages—General Data Synchronization

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

The following list shows the bidirectional, incremental synchronization messages to activate in the HCM and Financials databases. You must activate and execute the messages in this list.

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

- DEPT_SYNC
- LOCATION_SYNC

Unidirectional, Incremental Messages - PeopleSoft Resource Management-Specific Synchronization

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

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

This is a list of the unidirectional, incremental synchronization messages that you must activate in the HCM and Financials databases:

- BUS_UNIT_HR_SYNC
- CLUSTER_ACCOMP_SYNC
- CLUSTER_COMP_SYNC
- CM_TYPE_SYNC
- COMPETENCY_SYNC1
- COMPETENCY_SYNC2
- COMPETENCY_SYNC3

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- FREQUENCY_SYNC
- HOLIDAY_DATE_SYNC
- JOBCODE_SYNC
- JOB_FAMILY_SYNC
- PERSON_ACCOMP_SYNC
- PERSON_COMPETENCY_SYNC
- PERSON_BASIC_SYNC
- PERSON_VISA_CITIZEN_SYNC
- RATING_MODEL_SYNC
- ROLE_ACCOMP_SYNC
- ROLE_CLUSTER_SYNC
- ROLE_COMP_SYNC
- ROLE_SYNC
- SCHOOL_SYNC
- WORKFORCE_SYNC

Full Table Synchronization Messages

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

> **Note**
>
> There is an exception to the above statement. If you select the installation option to maintain non-employees in HCM and Financials databases, the full synchronization process does not update non-employee data for employee IDs that originate in PeopleSoft Resource Management. In this case the process only updates employee and non-employee data that originates in PeopleSoft HCM.

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

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> **Warning**
>
> Oracle recommends that you only use full synchronization messages during implementation. If there is existing data in the Financials database records and you use full synchronization messages, you will overwrite PeopleSoft Resource Management data that is associated with the message. Also, it is recommended that you only implement full synchronization messages as unidirectional with one database as a publisher and another as a subscriber.

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

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

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

Unidirectional, Full Synchronization Messages

The following list contains the unidirectional, full synchronization messages that you must activate in the HCM and Financials databases. When activated and executed, these messages overwrite all of the data that is associated with them in the Financials database with the data in the HCM database. Exceptions are preceded by an asterisk (*), which indicates that if you maintain non-employees in PeopleSoft Resource Management, the PeopleSoft HCM data does not overwrite the Resource Management data for non-employees that originates in Resource Management:

- BUS_UNIT_HR_FULLSYNC
- CLUSTER_ACCOMP_FULLSYNC
- CLUSTER_COMP_FULLSYNC
- CM_TYPE_FULLSYNC
- COMPETENCY_FULLSYNC1
- COMPETENCY_FULLSYNC2
- COMPETENCY_FULLSYNC3
- FREQUENCY_FULLSYNC
- HOLIDAY_DATE_FULLSYNC

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- JOBCODE_FULLSYNC
- JOB_FAMILY_FULLSYNC
- * PERSON_ACCOMP_FULLSYNC
- * PERSON_BASIC_FULLSYNC
- * PERSON_COMPETENCY_FULLSYNC
- * PERSON_VISA_CITIZEN_FULLSYNC1
- RATING_MODEL_FULLSYNC
- ROLE_ACCOMP_FULLSYNC
- ROLE_CLUSTER_FULLSYNC
- ROLE_COMP_FULLSYNC
- ROLE_FULLSYNC
- SCHOOL_FULLSYNC
- * WORKFORCE_FULLSYNC

A Caution Regarding Bidirectional, Full Synchronization Enterprise Messages

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

- DEPT_FULLSYNC
- LOCATION_FULLSYNC

Business Interlinks

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

This table lists the business interlink/XML transactions that are created by PeopleSoft Resource Management and used to integrate with Microsoft Exchange/Outlook:

Business Interlink Object	Purpose	Transaction
RS_SCHED_XCALFIND	Finds external calendar entries.	Sends a request to find an external calendar entry.
RS_SCHED_XCALREAD	Reads external calendar entries.	Sends a request to read an external calendar entry.
RS_SCHED_XCALWRITE	Writes external calendar entries.	Sends a request to write an external calendar entry.
RS_SCHED_XCALDELETE	Deletes external calendar entries.	Sends a request to delete an external calendar.

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12

Integrating PeopleSoft Resource Management with Other Applications

Understanding Integration with PeopleSoft Program Management

This section discusses integration with PeopleSoft Program Management.

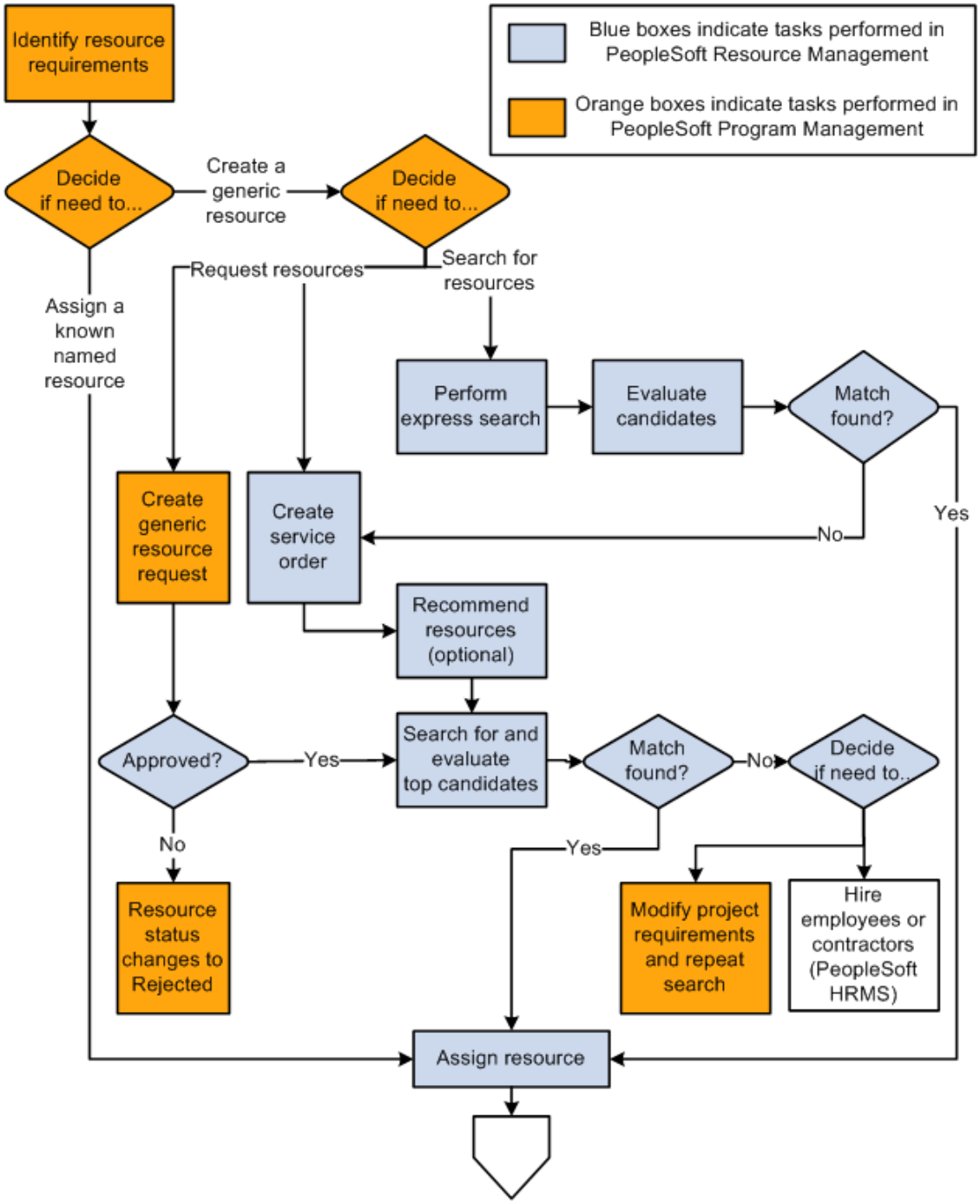
Integration with PeopleSoft Program Management

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

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

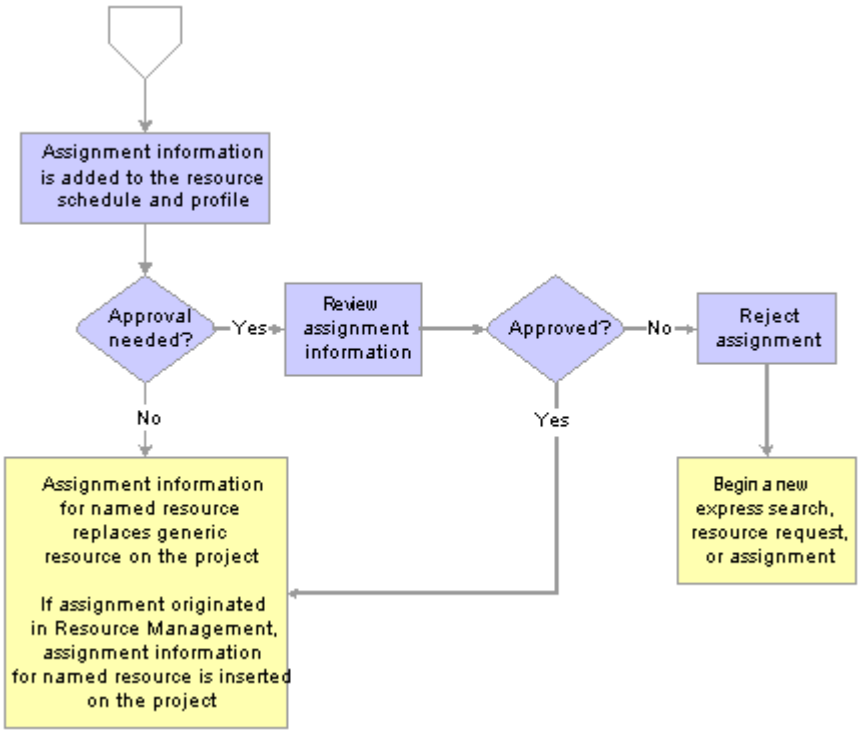
This diagram illustrates the process of assigning a resource to a project:

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

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Create Generic Resource Request

There are two ways you can request resources in PeopleSoft Resource Management: service orders and generic resource requests. You create generic resource requests from the Resources page or Resource Detail page in PeopleSoft Program Management. A generic resource request appears in the Pool Manager Workbench in PeopleSoft Resource Management with a status of *Pending* or *Allocated,* based on your PeopleSoft Resource Management business unit options. You can either fulfill the generic resource request with a named resource, or you can simply allocate capacity.

Create Service Order

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

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

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

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

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Assign Resource

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

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

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

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

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

Use Express Search

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

View Master Resource Schedule

You can review a chart of the schedules for resources who are requested, committed, allocated, or considered for a project from the Resources page in PeopleSoft Program Management.

Understanding Integration with the Services Forecasting Feature

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

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

Prerequisites

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

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

Related Topics

- Defining Task Categories and Mapping to TRCs
  To define task categories and map to TRCs, use the Task Type component (RS_TASK_TYPE).

Integration with the Services Forecasting Feature

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

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

Understanding Integration with PeopleSoft Project Costing

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

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

Understanding Integration with PeopleSoft Services Procurement

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

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

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Prerequisites

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

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

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

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

Related Topics

- PeopleSoft Services Procurement: User Preferences Page
- Application Fundamentals: Defining Resource Management Installation Options

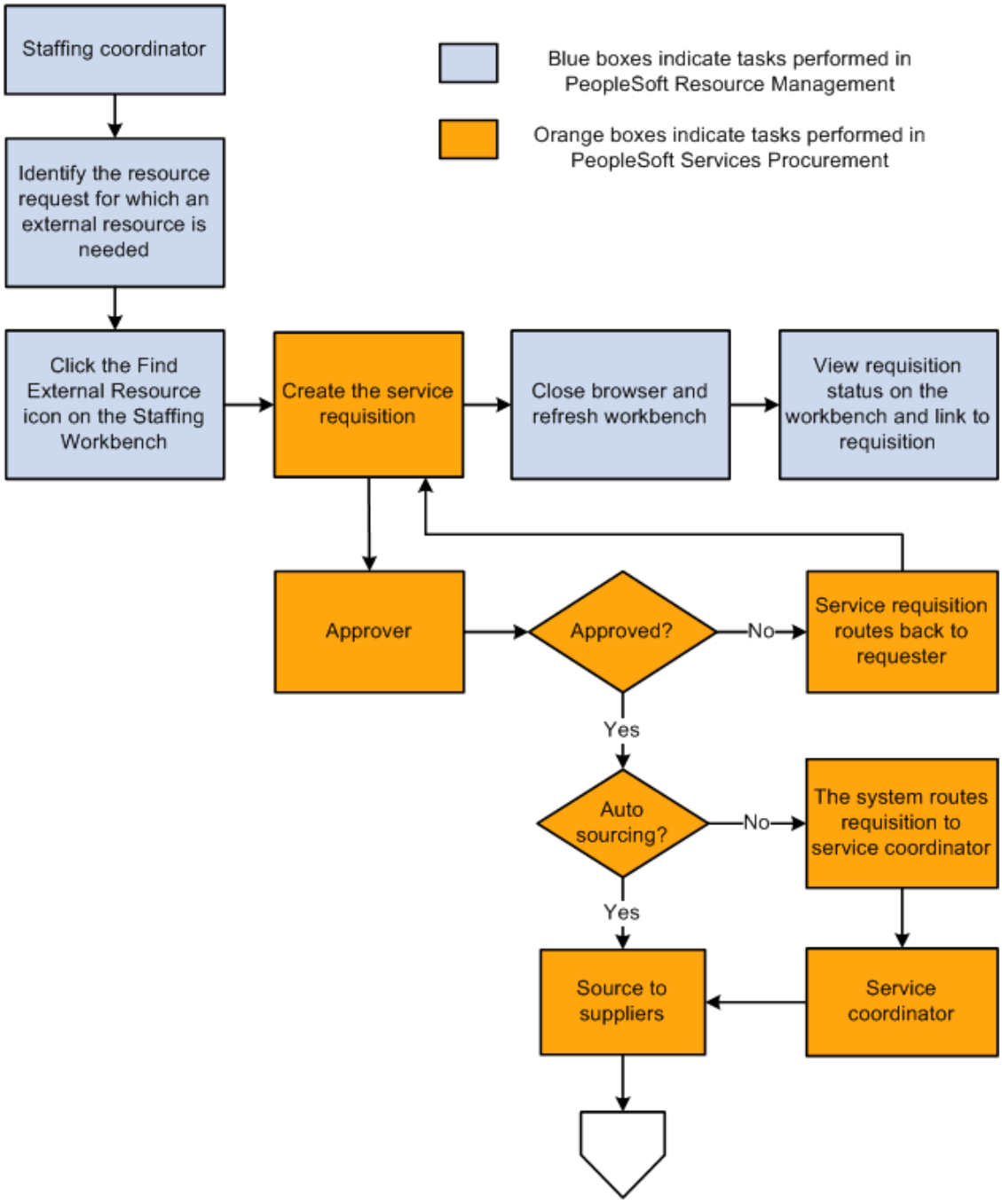
Integration with PeopleSoft Services Procurement

Integration with PeopleSoft Services Procurement enables you to:

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

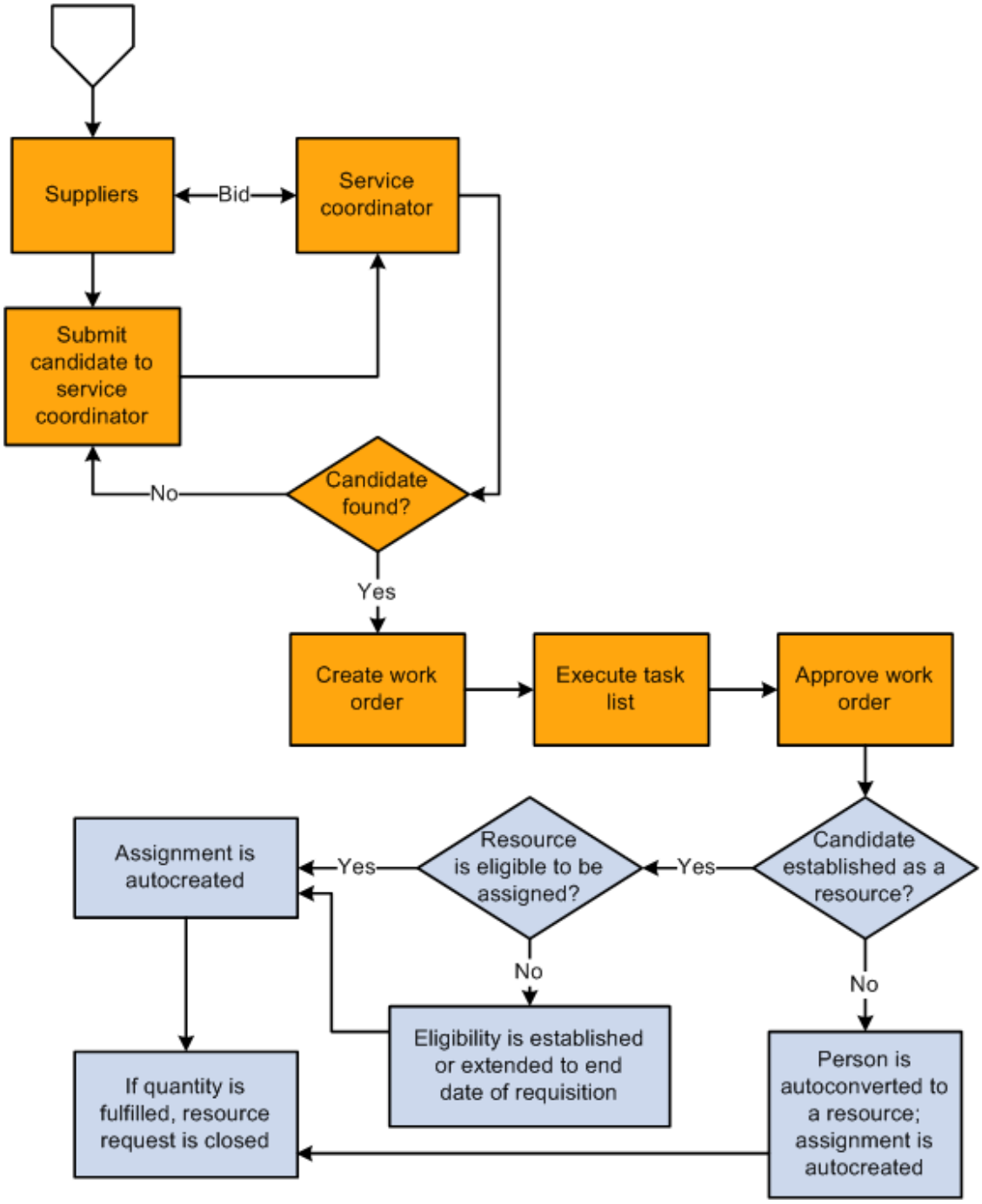
This diagram illustrates the process of using a PeopleSoft Services Procurement service requisition to fulfill a resource request if you allow non-employee data to be maintained in PeopleSoft Resource Management:

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

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Generate Service Requisition

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

If you select a service provider to fulfill a service requisition in PeopleSoft Services Procurement and the requisition is used to fulfill a resource request, the system checks to see if the service provider is established as an eligible resource in PeopleSoft Resource

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Management. If the service provider is not an eligible resource and you allow non-employee data to be maintained in the Financials database, one of these actions occurs:

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

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

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

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

Create Assignment from a Service Requisition

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

> **Note**
>
> Creating an assignment from a service requisition does not update work history in the resource profile.

View and Track Requisition Status

From the Staffing Workbench - Fulfill Orders page in PeopleSoft Resource Management, you can review the number of external requisitions initiated, filled, or canceled for each resource request.

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Establishing Customers

Understanding Customer Profiles

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

This section lists prerequisites and discusses:

- Customer profiles.
- Contact profiles.

Prerequisites

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

See .PeopleSoft Order to Cash Common Information: Understanding the Primary Customer Roles

Customer Profiles

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

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

Contact Profiles

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

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Working with Customer and Contact Profiles

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

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

Pages Used to Work with Customer and Contact Profiles

Page Name	Definition Name	Usage
Customer Information Page	RS_CUST_INFO1	View customer profiles, or add information that is specific to PeopleSoft Resource Management.
Contact Profile	RS_CONTACT_INFO1	View basic customer contact data, such as name, address, and telephone number.

Customer Information Page

Use the Customer Information page (RS_CUST_INFO1) to view customer profiles, or add information that is specific to PeopleSoft Resource Management.

Navigation:

- **Set Up Financials/Supply Chain**, and then **Product Related**, and then **Resource Management**, and then **Setup RM Customer Info**
- **Resource Management**, and then **Request Resources**, and then **Create or Review Service Order**, and then **Order Summary**

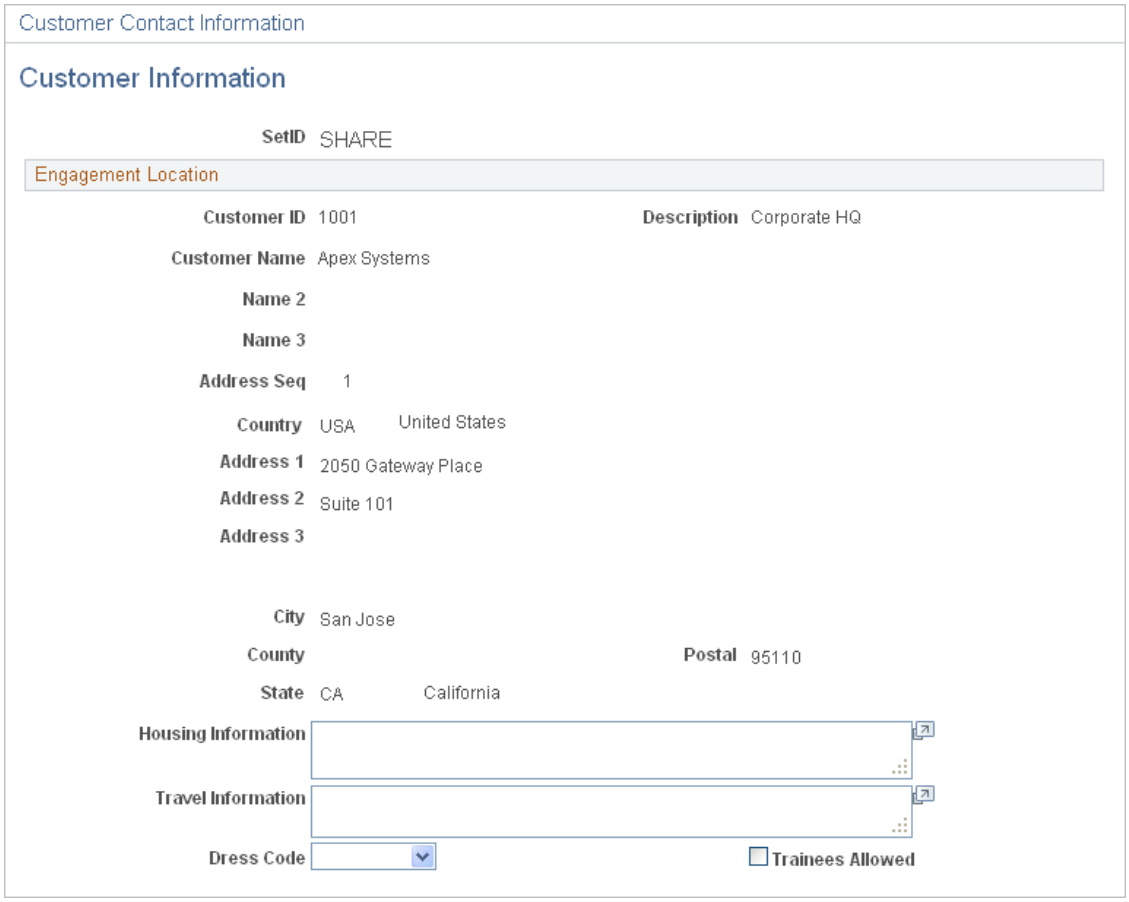
  Click **Location Details** on the service order's Order Summary page.
- Click **Change Location/Contact Information** in the **Resource Requests in this Order** scroll area, and click **Location Details** on the Service Order - Location and Contact Details page.
- **Resource Management**, and then **Request Resources**, and then **Create Svc Order from Template**, and then **Order Summary**

  Click **Location Details** on the Order Summary page.
- **Resource Management**, and then **Assign Resource**, and then **Assign Resource**

  Click **Location Details** on the Assign Resource page.

This example illustrates the fields and controls on the Customer Information page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Housing Information	Enter housing information that is specific to this customer location. For example, enter local hotel names or the maximum rate that the customer will pay.
Travel Information	Enter travel information that is specific to this customer location. For example, enter expenses that are not covered.
Dress Code	Enter the dress code that is observed at the project location. Values are *B. Casual* (business casual), *Casual*, and *Formal*.
Trainees Allowed	Select this option if this location permits trainees. A trainee is usually a non-billable resource who is observing, for evaluation purposes, the resource that is assigned to a project.

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Establishing Resources

Understanding Resources

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

Prerequisites

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

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

  See PeopleSoft Project Costing: Understanding the Pricing Process.
- (Optional) Establish the FTP file server to store resumes that are attached to resource profiles.

  See Understanding Storage of Resource Resume Attachments.

Resources in PeopleSoft Resource Management

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

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

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

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

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- Automatically convert a PeopleSoft Services Procurement service provider to a resource when the service provider is selected for a service requisition that is associated with a PeopleSoft Resource Management resource request if you integrate with Services Procurement and maintain non-employees in Resource Management.

Resources in Staffing Front Office and Maintenance Management

Depending on which products that you install, you can establish an employee or non-employee as a PeopleSoft Resource Management resource, a Staffing Front Office resource, or a Maintenance Management resource, or any combination thereof. To establish an individual as a Staffing Front Office or Maintenance Management resource, you must navigate to the Create Resources page for the particular product.

If a resource is already established as a PeopleSoft Staffing Front Office or Maintenance Management resource, and you attempt to establish that resource as a PeopleSoft Resource Management resource, the system generates a warning to confirm the action.

Establishing and Maintaining Employees and Non-Employees as Resources

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

> **Note**
>
> The effective date for the resource will be the date that the employee or non-employee is established as a resource in Resource Management.

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

You associate supply categories with resources when you establish the resources. You can update the role and region for a resource in the **Additional Resource Information** group box on the Profiles - Overview page.

Supply categories are resource attributes:

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

Personnel Status is already assigned to employees in the HCM database and is synchronized with the resource data in PeopleSoft Resource Management.

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

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

Page Name	Definition Name	Usage
Create Resources Program Page	RS_CW	Select the criteria to generate a list of employees or non-employees to establish as resources. You can select employees by job code, business unit, location, or department. You can also select individual employees and non-employees.
Create Resources Program (list) Page	RS_CW_2	Review the employees and non-employees to be established as resources and execute the Create Resources Application Engine process (RS_CW).
Create Resources Page	RS_WRKR_CREATE	Enter supply categories and establish an individual employee or non-employee as a resource.
Profiles - Overview Page	RS_ERES_OVERVW	Update a resource's role and region.
Establish Employee as Resource Page	RS_WRKR_CREAT_CHNG	If you allow multiple jobs in PeopleSoft HCM, select one job to associate with the employee or non-employee resource in PeopleSoft Resource Management. The list of active jobs for this employee appears on this page.

Create Resources Program Page

Use the Create Resources Program page (RS_CW) to select the criteria to generate a list of employees or non-employees to establish as resources.

You can select employees by job code, business unit, location, or department. You can also select individual employees and non-employees.

Navigation:

Resource Management, and then **Establish Resources**, and then **Create Resources Program**, and then **Create Resources Program**

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

Job Codes

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

This example illustrates the fields and controls on the Job Codes collapsible grid on the Create Resources Program page. You can find definitions for the fields and controls later on this page.



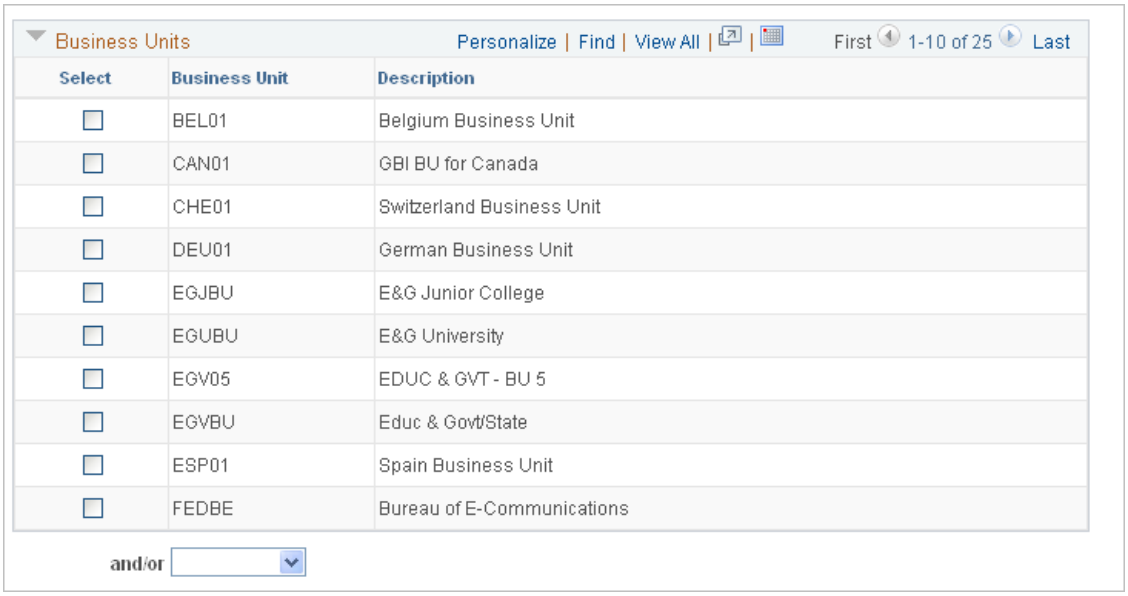
Field or Control	Description
Select	Select one or more job codes for PeopleSoft Resource Management to use to generate the list of employees and non-employees to establish as resources.
and/or	Select *and* to narrow the list. The system includes only employees and non-employees that meet these criteria and the criteria that is in the next grid. Select *or* to include employees and non-employees that meet any of the criteria that is selected in the grids. If you leave this field blank, the system includes employees and non-employees that meet any of the criteria that is selected in the grids.

Business Units

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

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This example illustrates the fields and controls on the Business Units collapsible grid on the Create Resources Program page. You can find definitions for the fields and controls later on this page.

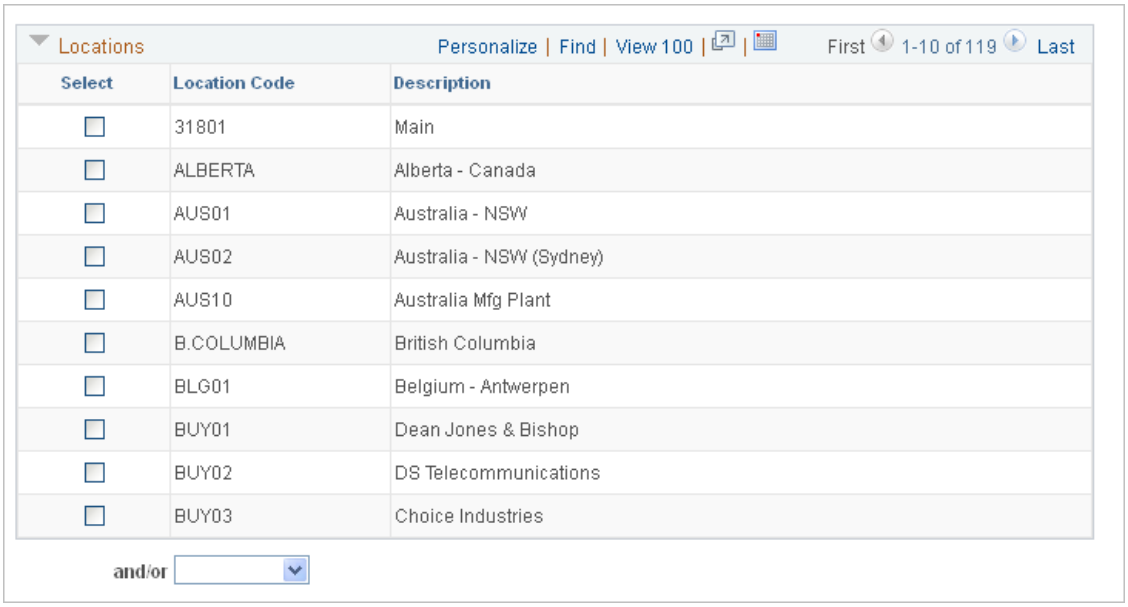


Field or Control	Description
Select	Select one or more business units for PeopleSoft Resource Management to use to generate the list of employees or non-employees to establish as resources.

Locations

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

This example illustrates the fields and controls on the Locations collapsible grid on the Create Resources Program page. You can find definitions for the fields and controls later on this page.



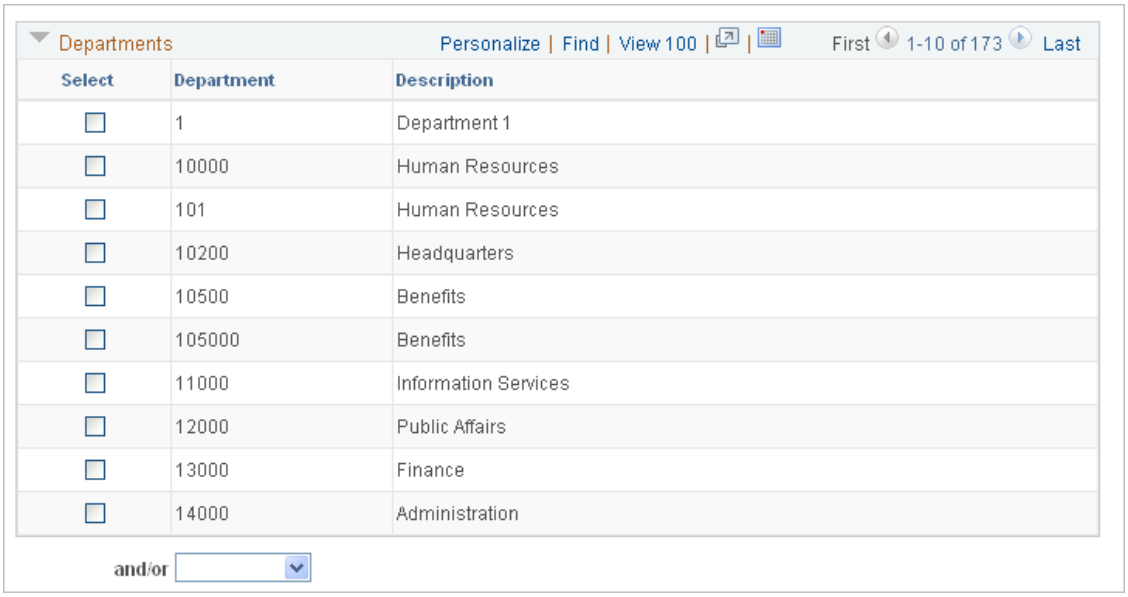
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Field or Control	Description
Select	Select one or more locations for PeopleSoft Resource Management to use to generate the list of employees or non-employees to establish as resources.

Departments

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

This example illustrates the fields and controls on the Departments collapsible grid on the Create Resources Program page. You can find definitions for the fields and controls later on this page.



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

Employees

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

This example illustrates the fields and controls on the Employees collapsible grid on the Create Resources Program page. You can find definitions for the fields and controls later on this page.

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In addition to the criteria specified above, you may select specific employees to establish as a Resource.

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Employees

Select	Empl ID	Name	Job Code	Business Unit	Location Code	Department	Personnel Status
☐	IXHEEE202	Albright,Anthony	KU076	US004	ICA1	22000	Non-Employee
☐	IXHEEE180	Arden,Brenda	KU036	US005	ICA1	22000	Employee
☐	IXHEEE199	Avery,John	KU036	US006	ICA1	41000	Employee
☐	IXHEEE191	Ball,Susan	KU120	US006	ICA1	11000	Employee
☐	IXHEEE215	Barbatos,Sharon	KU078	US004	ICA1	22000	Non-Employee
☐	IXHEEE142	Barfield,John	IXHE01	US004	ICA1	14000	Employee
☐	RS00000045	Brewer,Beverly	KU112	US003	US003	11000	Employee
☐	KU0008	Bronte,Jeanette	IXHE01	US003	ICA1	42000	Employee
☐	IXHEEE176	Brown III,Anne	KU105	US005	ICA1	41000	Employee
☐	IXHEEE211	Carroll,Robert	KU078	US004	ICA1	22000	Non-Employee

Consider

Field or Control	Description
Select	Select the employee ID for each employee or non-employee to establish as a resource in addition to those that meet the criteria that is specified by job code, location, or department.
Consider	After you select employees for creating resources, click this button to add these employees added to the **Considering** group box and remove them from the **Employees** group box.

Considering

This group box displays a list of employees that you selected for creating resources.

This example illustrates the fields and controls on the Considering collapsible grid on the Create Resources Program page. You can find definitions for the fields and controls later on this page.


Considering

Personalize | Find | View All | First 1-4 of 4 Last

Empl ID	Name	Job Code	Business Unit	Location Code	Department	Personnel Status	
IXHEEE202	Albright,Anthony	KU076	US004	ICA1	22000	Non-Employee	−
IXHEEE180	Arden,Brenda	KU036	US005	ICA1	22000	Employee	−
IXHEEE179	Austin,James	KU036	US005	ICA1	41000	Employee	−
KU0008	Bronte,Jeanette	IXHE01	US003	ICA1	42000	Employee	−

Generate List Clear

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You can delete employees from this group box, at which time the system automatically adds the deleted employees back to the **Employees** grid.

Field or Control	Description
Generate List	Click this button to view a list of the selections. All employees meeting the selection criteria appear in the **Resources To Be Established** group box to be established as resources when you click the **Establish Resource** button.
Clear	Click this button to clear your selections in all grids on the page.

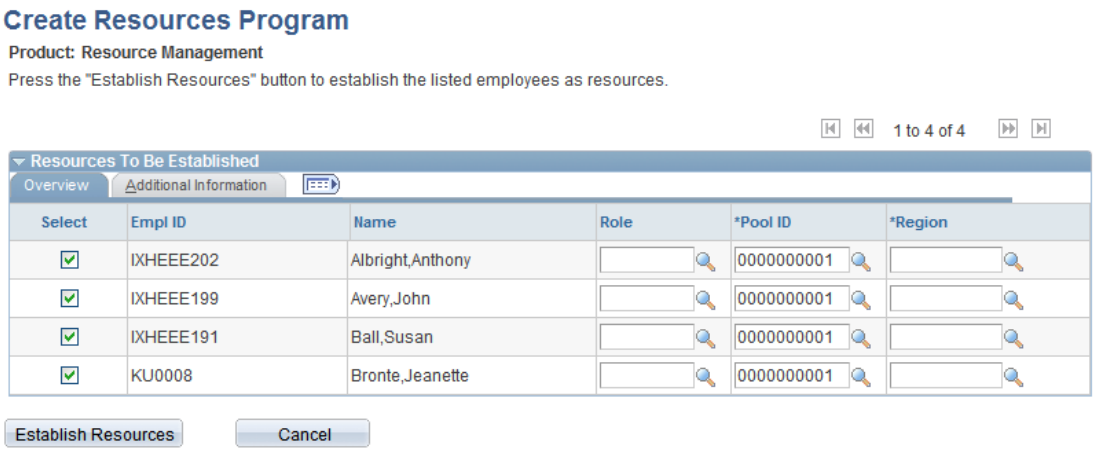
Create Resources Program (list) Page

Use the Create Resources Program (list) page (RS_CW_2) to review the employees and non-employees to be established as resources and execute the Create Resources Application Engine process (RS_CW).

Navigation:

Click the **Generate List** button on the Create Resources Program page.

This example illustrates the fields and controls on the Create Resources Program (list) page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Select	The system automatically selects all check boxes for employees and non-employees appearing on the list so that they will be created as resources. Deselect the check box of any employee and non-employee that you do not want to create as assignable resources.
Role	Enter a project role for the resource. This field is optional; however, entering a role for all resources enhances the capacity planning functionality in PeopleSoft Resource Management.

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Field or Control	Description
Pool ID	Enter a resource pool ID for the resource. You must enter a resource pool when you establish a resource.
Region	Enter a region code for the resource. You must enter a region when you establish a resource.
Establish Resources	Click to run the Create Resources process to convert the list of selected employees and non-employees into assignable resources. This process does not affect PeopleSoft HCM employee records. The process establishes a new row of data in the Worker table (RS_WORKER_TBL) and Worker Effective Date table (RS_WRKR_EFFDT) for each resource. New resources are established as eligible for staffing in PeopleSoft Resource Management, which means that they are included in Resource Matching and can be placed on assignments. Use the Resource Eligibility Management page to change the resource's eligibility.
Cancel	Clears the list and returns to the preceding page.
Conflicting Resources	If any of the resources that you establish have more than one job in PeopleSoft HCM (more than one active row in the JOB table), they are listed here. When you execute the process, the system selects the job with the lowest field value in the Employee Record Number field (EMPL_RCD) to enter into the Resource Management Worker table and Worker Effective Date table. The lowest employee record number represents the job entry that is created first. Use the Establish Employee as Resource - Select Job page to select a different job to which the resource can be assigned in PeopleSoft Resource Management.

Related Topics

- Understanding Capacity Planning
  This section discusses:

Create Resources Page

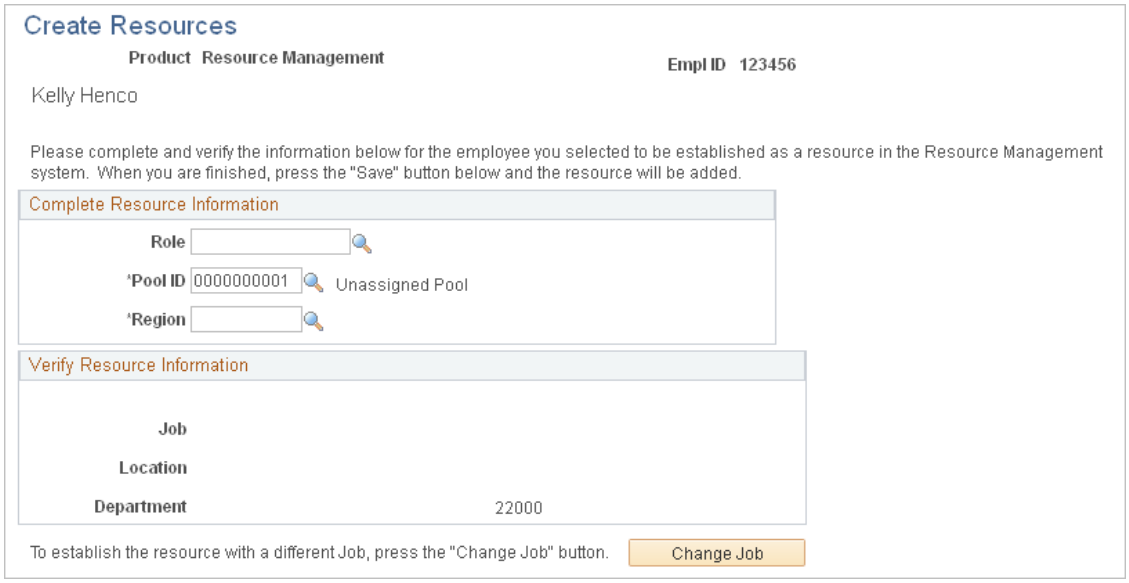
Use the Create Resources page (RS_WRKR_CREATE) to enter supply categories and establish an individual employee or non-employee as a resource.

Navigation:

Resource Management, and then **Establish Resources**, and then **Create Resources**, and then **Create Resources**

This example illustrates the fields and controls on the Create Resources page. You can find definitions for the fields and controls later on this page.

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

Complete Resource Information

These fields comprise supply category information.

Field or Control	Description
Role	Enter a project role for the resource. This field is optional; however, entering a role for all resources enhances the capacity planning functionality in PeopleSoft Resource Management.
Pool	Enter the resource's pool ID. You must enter a resource pool when you establish a resource.
Region	Enter a region code for the resource. You must enter a region when you establish a resource.

Verify Resource Information

Field or Control	Description
Job, Location, and **Department**	Verify the information for this employee. If the values that appear on this page are incorrect, access the employee source database to make corrections.
Save	Click to establish the employee as a resource with the values that appear on the page.
Change Job	If you integrate with PeopleSoft HCM and use the multijob feature, click **Change Job** to establish the resource with a different job.

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Establish Employee as Resource Page

Use the Establish Employee as Resource page (RS_WRKR_CREAT_CHNG) to if you allow multiple jobs in PeopleSoft HCM, select one job to associate with the employee or non-employee resource in PeopleSoft Resource Management.

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

Navigation:

Click the **Change Job** button on the Create Resources page.

Field or Control	Description
Select	Click the **Select** button adjacent to the appropriate job to associate with this resource in PeopleSoft Resource Management.

Establishing PeopleSoft Services Procurement Service Providers as Resources

This topic provides an overview of service providers and discusses how to establish PeopleSoft Services Procurement Service Providers as Resources.

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

Pages Used to Establish PeopleSoft Services Procurement Service Providers as Resources

Page Name	Definition Name	Usage
Convert Person ID to Resource Page	RS_CONV_PERS_DATA	Specify employee information and job details for the person ID.
Map Employee ID to Person ID Page	RS_MAP_EMP_TO_PER	Map a PeopleSoft Services Procurement person ID to an employee record in PeopleSoft Resource Management. Use this page only if PeopleSoft HCM is the employee source database.

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Understanding Service Providers

In PeopleSoft Services Procurement, each service provider has a unique person ID. This section discusses the methods that can be used to establish a service provider as an eligible, non-employee resource in PeopleSoft Resource Management.

Manual Creation of Service Providers as Resources

These are the steps to manually establish a service provider as a resource:

1. Associate the service provider person ID with an employee record in PeopleSoft Resource Management in one of two ways:
   - If you allow non-employee resources to be maintained in the Financials database, access the Convert Person ID to Resource page to create an employee record with the personnel status of non-employee from the existing person ID.
   - If you require non-employees to be maintained in the HCM database, create the employee record in PeopleSoft HCM, load the employee data into PeopleSoft Resource Management by using the application messaging synchronization process, and then access the Map Employee ID to Person ID page to associate the service provider with an employee record.

     Now you can access the Create Resources page to establish the individual service provider as a resource, or access the Create Resources Program page to establish resources in batch.
2. Access the Maintain Eligibility page to manage the resource's eligibility.

   By default, the resource is eligible to be placed on an assignment.

Automatic Creation of Service Providers as Resources

If you select a service provider to fulfill a service requisition in PeopleSoft Services Procurement and the requisition is associated with a resource request, the system checks to see if the service provider is established as an eligible resource in PeopleSoft Resource Management. If the service provider is not an eligible resource and you allow non-employee data to be maintained in the Financials database, the system can automatically establish the service provider as a resource for you. The system assigns these supply categories to the resource:

- Resource pool: *Unassigned Pool*
- Role: blank
- Personnel status: *Non-Employee*

> **Note**
>
> After you create PeopleSoft Services Procurement resources, update the region to which the resources belong in the resource profiles.

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

- If non-employees are maintained in PeopleSoft Resource Management and the person ID is not associated with an employee value (EMPLID) in Resource Management, the system creates an employee value with the personnel status *Non-Employee.*

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By default, the system creates the resource with the status eligible and the resource can be placed on an assignment. The system automatically changes the status to not eligible at the requisition end date. Other default values that appear in the employee record are specified on the Installation Options - Resource Management page.

- If the service provider is associated with an employee record that is established as a resource, but the resource currently has a status of not eligible, the resource status changes to eligible.

  A future-dated row is added to return the resource to an ineligible status on the requisition end date.

> **Note**
>
> You can allow the resource to remain eligible after the assignment end date by manually deleting the future-dated ineligibility row.

This automatic conversion process occurs before the service provider is placed on the assignment in PeopleSoft Resource Management. The automatic conversion occurs only if you allow non-employee resources to be maintained in the Financials database.

> **Note**
>
> If you maintain non-employee data in both databases, and you integrate PeopleSoft Resource Management with Services Procurement, two employee records may exist for the same person. This can occur if a PeopleSoft Services Procurement person ID (PERSON_ID) and an PeopleSoft HCM employee record exist for the same person, and the system automatically establishes the person ID as a non-employee resource in PeopleSoft Resource Management.

Related Topics

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

Convert Person ID to Resource Page

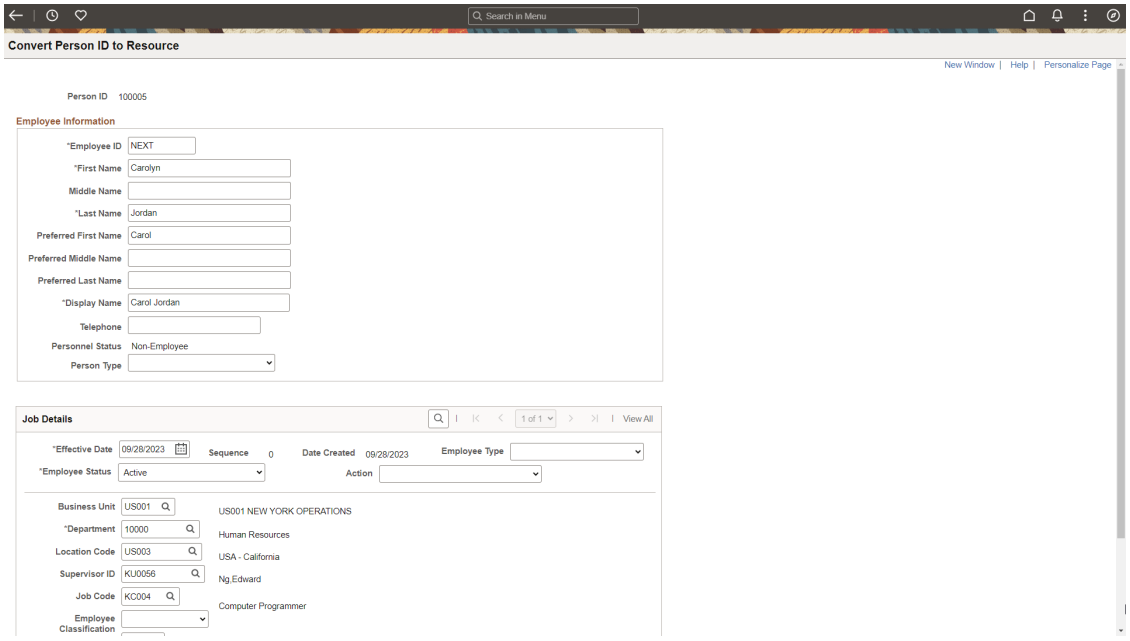
Use the Convert Person ID to Resource page (RS_CONV_PERS_DATA) to specify employee information and job details for the person ID.

Navigation:

Resource Management, and then **Establish Resources**, and then **Convert Person ID to Resource**, and then **Convert Person ID to Resource**

This example illustrates the fields and controls on the Convert Person ID to Resource page.

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Employee Information

See the Application Fundamentals: Personal Data (Edit) Page (Common Definitions) for field definitions for **First Name**, **Middle Name**, **Last Name**, *Preferred First Name*, **Preferred Middle Name**, **Preferred Last Name**, and **Display Name**.

The **Personnel Status** value of *Non-Employee* is not editable.

Job Details

Default values for these fields are determined on the Installation Options - Resource Management page. You can override them for the employee if needed.

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

Related Topics

- Update Employee Data: Personal Data Page
  Use the Update Employee Data - Personal Data page (RS_CM_PERSONL_DATA) to specify name, address, telephone, and personnel status information for an employee ID.
- Application Fundamentals: Defining Resource Management Installation Options

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Map Employee ID to Person ID Page

Use the Map Employee ID to Person ID page (RS_MAP_EMP_TO_PER) to map a PeopleSoft Services Procurement person ID to an employee record in PeopleSoft Resource Management.

Navigation:

Resource Management, and then **Establish Resources**, and then **Map Employee ID to Person ID**

Use this page if PeopleSoft HCM is the only source database for non-employees. When you enter the Map EmplID to Person ID component (RS_MAP_EMP_TO_PER), select **Add a New Value** on the search page to create a new association between an employee ID and a person ID. Select **Find an Existing Value** to view and edit an existing association.

Field or Control	Description
Employee ID	In the search page, select the employee ID to map to a person ID or view an existing association. Available values are based on employee IDs that are created in the HCM database with a personnel status of non-employee and are not already mapped to a person ID.
Add	Click to proceed to select the corresponding person ID.
Person ID	Enter the person ID from PeopleSoft Services Procurement to associate with this employee ID in PeopleSoft Resource Management. Available values are based on person IDs that are not already mapped to an employee ID.

Maintaining Resource Eligibility and Job Information

This topic discusses how to maintain Resource Eligibility and Job Information.

Pages Used to Maintain Resource Eligibility and Job Information

Page Name	Definition Name	Usage
Maintain Eligibility Page	RS_WRKR_MGMT	Review or change a resource's eligibility.
Resource Eligibility Management Page	RS_WRKR_MGMT_FUT	Change or add a future eligibility status and effective date for the resource.
Select Job Page	RS_WRKR_JOB_INFO	View the current job that is associated with the resource.
Change Job Page	RS_WRKR_NEW_JOB	If you allow multiple jobs in PeopleSoft HCM, select one job to associate with the employee or non-employee resource in PeopleSoft Resource Management.

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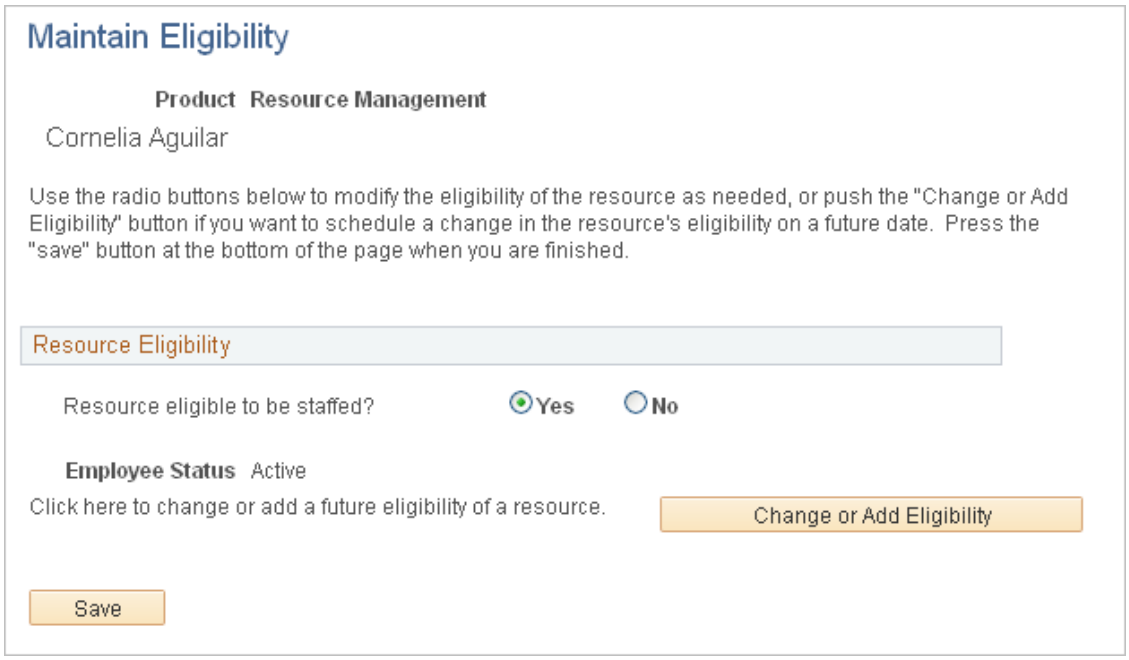
Maintain Eligibility Page

Use the Maintain Eligibility page (RS_WRKR_MGMT) to review or change a resource's eligibility.

Navigation:

Resource Management, and then **Establish Resources**, and then **Maintain Eligibility**, and then **Maintain Eligibility**

This example illustrates the fields and controls on the Maintain Eligibility page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Resource eligible to be staffed?	Select *Yes* or *No* to indicate whether the resource is eligible for assignments and resource matching in PeopleSoft Resource Management. You cannot select *Yes* if the **Employee Status** value is not *Active.* If an employee or non-employee is inactive, a message appears on the page stating that the resource cannot be made eligible to be staffed before the date the resource becomes *Active.*
Employee Status	Displays the employee's or non-employee's human resources status in the employee source database. **Note:** Changing a resource's eligibility does not change the employee status in the employee source database.

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Field or Control	Description
Change or Add Eligibility	Click this button to access the Resource Eligibility Management page to manage future eligibility. This button is unavailable if the resource status is *Inactive, Deceased, Suspended,* or *Terminated.*

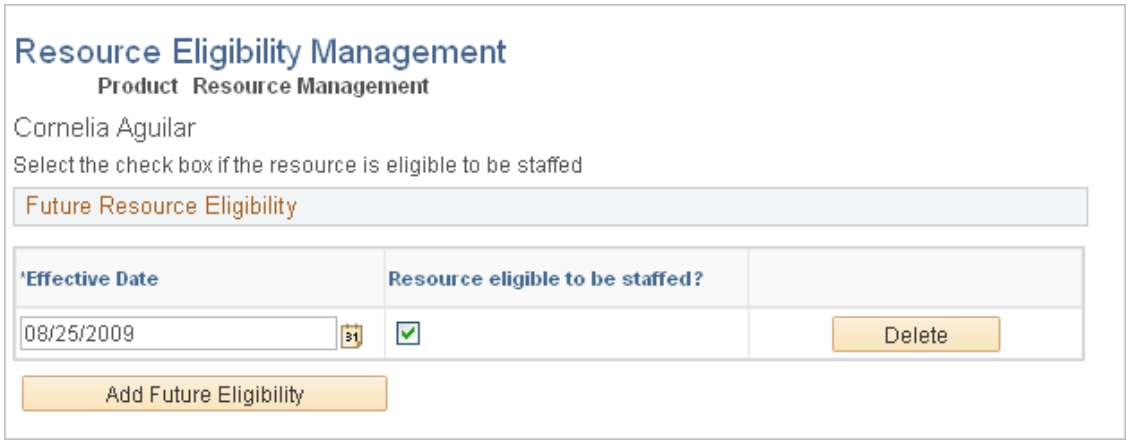
Resource Eligibility Management Page

Use the Resource Eligibility Management page (RS_WRKR_MGMT_FUT) to change or add a future eligibility status and effective date for the resource.

Navigation:

Click the **Change or Add Eligibility** button on the Maintain Eligibility page.

This example illustrates the fields and controls on the Resource Eligibility Management page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Effective Date	Enter the date on which the eligibility change becomes effective.
Resource eligible to be staffed?	Select if the resource is eligible for assignments as of the effective date. Deselect if the resource is ineligible for assignments as of the effective date.
Add Future Eligibility	Click this button to add additional eligibility lines with dates incremented from the current row date.

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> **Note**
>
> Changing a resource to ineligible at a future date does not prevent you from scheduling the resource before the effective date for an assignment that begins or continues after the effective date. However, on or after the date that resource become ineligible, you can no longer assign the resources, and they are not included in Resource Matching if the employee status is Inactive, Deceased, Suspended or Terminated. You can continue to access and update the ineligible resource's profile, and you can access the ineligible resource's schedule and enter appointments.

> **Note**
>
> A resource's assignments are automatically canceled if an employee's status changes in PeopleSoft HCM from active to any other status and an entry is added marking the employee ineligible to be staffed from the date of status change, if you use HCM as the employee source database.

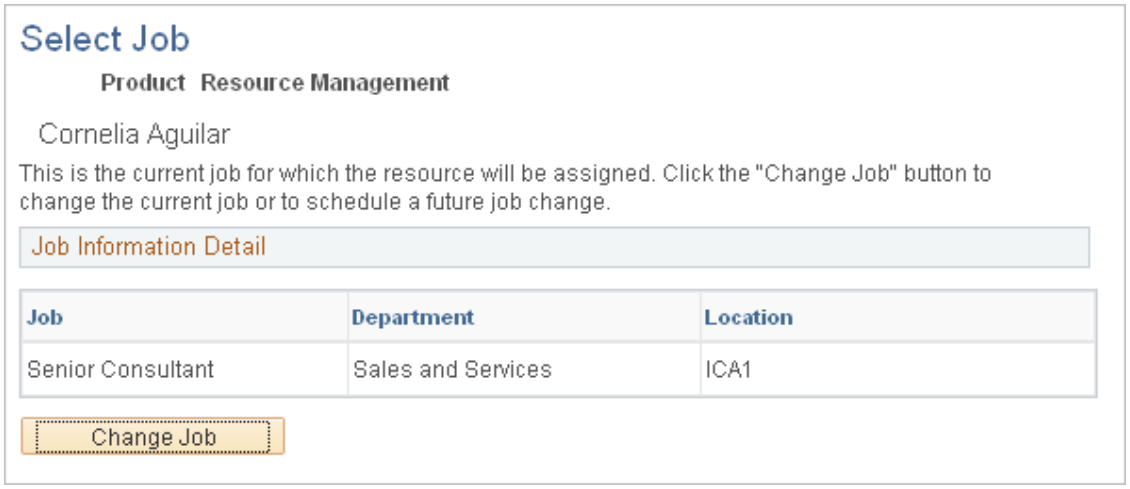
Select Job Page

Use the Select Job page (RS_WRKR_JOB_INFO) to view the current job that is associated with the resource.

Navigation:

Resource Management, and then **Establish Resources**, and then **Establish Resources Select Job**

This example illustrates the fields and controls on the Select Job page. You can find definitions for the fields and controls later on this page.



Use this page only if you use the Multiple Jobs feature in PeopleSoft HCM.

In PeopleSoft HCM, you can establish rules for multiple jobs so that you can assign an employee to multiple job categories. In PeopleSoft Resource Management, you can designate only one active job for each resource.

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Field or Control	Description
Change Job	Click this button to select a different job to associate with the resource in PeopleSoft Resource Management.

Change Job Page

Use the Change Job page (RS_WRKR_NEW_JOB) to if you allow multiple jobs in PeopleSoft HCM, select one job to associate with the employee or non-employee resource in PeopleSoft Resource Management.

Navigation:

Click the **Change Job** button on the Select Job page.

Use this page only if you establish rules for multiple jobs in PeopleSoft HCM.

The list of active jobs for a resource appears on this page.

Field or Control	Description
New Job	Select a job to associate with the resource in PeopleSoft Resource Management.
Effective Date	Enter the date on which the job change becomes effective.

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15

Enabling Resource Schedules

Understanding Resource Schedules

PeopleSoft Resource Management provides a schedule to manage each resource's monthly, weekly, and daily commitments. The system creates a schedule for each employee or non-employee that you establish as a resource in the Financials database. The resource, resource manager, or practice manager can modify the schedule, which is updated automatically with the resource's assignment tasks. Information that is stored on a resource's schedule is used to determine the resource's availability factor, which the system evaluates when it searches for resources to fulfill assignments.

This section discusses:

- Task categories.
- TRCs.
- Holidays.

Task Categories

In PeopleSoft Financials, a task is the equivalent of a schedule entry, such as an appointment or assignment. Resource tasks are managed with a set of predefined task categories that are delivered with PeopleSoft Resource Management, and user-definable categories that are available for tasks that are specific to the organization. There are two main types of task categories: assignment task categories, such as billable external and non-billable internal, and appointment task categories, such as meeting and holiday.

Every entry on a resource's schedule must be associated with a task category. Task categories are used to distinguish between different types of tasks on a resource's schedule, for both informational purposes and in the Resource Matching Availability factor fit score calculation. Each task category is assigned a flexibility percentage, which is used in Resource Matching to identify how easily a task in that category can be rescheduled. Tasks that are in a category with a high flexibility percentage are considered more likely to be rescheduled. Resources with high flexibility tasks on their schedules are considered to be more available than resources with low flexibility tasks.

> **Note**
>
> Tasks in PeopleSoft are not the same as tasks that appear on a task pad or to-do list, such as those offered by Microsoft Outlook and other calendar management tools.

The assignment process adds assignment tasks with a status of reserved, pending approval, and assigned to the schedule. For assignment task categories, the basic flexibility percentage that you assign applies to assignments with a status of pending approval or assigned. You can also indicate a reserved status flexibility for assignment task categories, which assigns a different—usually higher—flexibility for assignment tasks that are in that category with a status

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of reserved. For example, if the basic flexibility percentage for the task category of billable external is zero percent, the reserved flexibility percentage of the billable external task category can be set to 50 percent.

The following table identifies:

- Each delivered task category and description.
- The basic (default) flexibility percentage.
- The flexibility percentage for the task category with a reserved assignment status.
- Whether the task category is available for an assignment (Y) or an appointment (N).

Task Category	Description	Basic (Default) Flexibility	Reserved Status Flexibility	Assignment
BE	Billable External	0.00	0.50	Y
BI	Billable Internal	0.25	0.75	Y
CORPORATE	Corporate Event	0.00	0.00	N
EDUCATION	Education - College/Univ	0.25	0.25	N
HOLIDAY	Company Holiday	0.00	0.00	N
LEAVE	Planned Leave	0.00	0.00	N
MEETING	Meeting	0.50	0.50	N
NE	Non-billable External	0.25	0.75	Y
NI	Non-billable Internal	0.50	1.00	Y
PERSONAL TIME	Personal Time Off	0.50	0.50	N
SCHEDULED HOLIDAY	Scheduled Holiday	0.00 if *Do not Schedule Assignments on Holidays* is selected on the Installation Options - Resource Management page. 1.00 if *Do not Schedule Assignments on Holidays* is not selected on the Installation Options - Resource Management page.	0.00 if *Do not Schedule Assignments on Holidays* is selected on the Installation Options - Resource Management page. 1.00 if *Do not Schedule Assignments on Holidays* is not selected on the Installation Options - Resource Management page.	N
TRAINING	Corporate Training	0.75	0.75	N
VACATION	Vacation	1.00	1.00	N

For each delivered task category, you can modify the default flexibility percentage and change the type value to *Y* (assignment) or *N* (appointment), with the exception of the Scheduled Holiday task category. The default flexibility percentage for the Scheduled Holiday task

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category is editable only when the *Do not Schedule Assignments on Holidays* option is not selected on the Installation Options - Resource Management page. The *Do not Schedule Assignments on Holidays* option appears on the Installation Options - Resource Management page only if PeopleSoft Program Management is not installed.

For assignment task categories, you can also modify the reserved status flexibility percentages.

You can create additional task categories for appointment types or assignment types. You can rename any task category that you create; however, you cannot rename the delivered task categories. Two task categories, OTHER and OTHER2, are delivered as examples.

Time Reporting Codes

You must map task categories to TRCs for non-assignment time if you use the Services Forecasting feature that is available with PeopleSoft Program Management. A TRC represents an incident of time and defines its type, units, currency, and other attributes. When the forecast collection tool in Services Forecasting extracts data from the PeopleSoft Resource Management resource schedules to load resource forecasts, the tool loads non-assignment hours based upon a task category's mapping to a TRC. The tool does not load non-assignment time into a resource forecast for which no mapping exists.

Related Topics

- PeopleSoft Program Management: TRCs and Task Categories

Holidays

Holidays that are observed in the workplace impact availability, and holiday schedules can differ from country to country. In PeopleSoft Financials, you can recognize scheduled holidays on resource schedules.

Like other tasks, holiday tasks must be associated with a task category. Using the Scheduled Holiday task category enables you to manage flexibility during the holiday and supports reporting capabilities. For example, you can select a holiday task category to include holidays in utilization ratio calculations on the Scheduled Utilization report.

When you implement PeopleSoft Resource Management, all of the resource schedules are empty. The schedules reside in the Schedule Tasks record (RS_SCHED_TASK), which is delivered without data. When you start using PeopleSoft Resource Management, Resource Matching determines each eligible resource's availability to fulfill each open service order. The system calculates availability by analyzing the flexibility of each task on a resource's schedule and the portion of the resource's available work time that is assigned to tasks.

The holidays that each employee is entitled to observe reside in the Holiday Dates record (HOLIDAY_DATE), which is populated on the Holiday Schedule page during installation. If you integrate with PeopleSoft Human Capital Management (PeopleSoft HCM), holidays may be created in that system based on your setup. During installation you initiate the Holiday Load Application Engine process (RS_HOLIDAY) to insert holidays into each resource's schedule. This process inserts into the resource's schedule all of the holidays that are associated with the holiday schedule that is specified on the resource's current data row on the Job record (JOB) in the employee source database. The process inserts a task with a task category of *SCHEDULED_HOLIDAY* for every holiday.

Scheduling Assignments on Holidays

If you use PeopleSoft Resource Management without PeopleSoft Program Management, at implementation you can enable the system to schedule assignments on every working day

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within an assignment date range, including resource holidays. Alternatively, if you select the installation option to exclude holidays from resource assignments, and the resource has tasks with a Scheduled Holiday task category within the date range of an assignment, the system does not schedule the assignment on those dates on the resource's calendar.

Tasks with a Scheduled Holiday task category are loaded into resource calendars either by the Holiday Load process, or by manually creating an appointment with a Scheduled Holiday task category. If you select the *Do not schedule assignments on Holidays* option on the Installation Options - Resource Management page, the system does not schedule assignments on top of tasks that have a Scheduled Holiday task category.

> **Note**
>
> The system does not treat the Company Holiday (HOLIDAY) task category the same as the Scheduled Holiday task category. You can create appointments with a Company Holiday task category; however, the system does not recognize them as scheduled holidays during assignment creation.

PeopleSoft delivers the Scheduled Holiday task category with the PeopleSoft Resource Management system. You cannot change these fields on the Scheduled Holiday task category:

- *Task Category*
- *Task Description*
- *Use for Assignment*
- *Comments*

The *Flexibility* field is editable in certain circumstances based on the following table:

PeopleSoft Program Management Installed	***Do not schedule assignments on Holidays* installation option is selected**	Default Flexibility Value	Flexibility Value Editable
No	Yes	0.00	No
No	No	1.00	Yes
Yes	Option not available	0.00	No

> **Note**
>
> If PeopleSoft Program Management is installed, the system always skips holidays when creating PeopleSoft Resource Management assignments.

See Application Fundamentals: Defining Resource Management Installation Options.

Defining Task Categories and Mapping to TRCs

To define task categories and map to TRCs, use the Task Type component (RS_TASK_TYPE).

This topic discusses how to create or update task categories and map to TRCs.

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Page Used to Define Task Categories and Map to TRCs

Page Name	Definition Name	Usage
Task Categories Page	RS_TASK_TYPE	Create or update task categories, map task categories to TRCs, view and modify the values for delivered task categories. Rename and modify user-defined task categories or the delivered PeopleSoft *OTHER* and *OTHER2* task categories.

Task Categories Page

Use the Task Categories page (RS_TASK_TYPE) to create or update task categories, map task categories to TRCs, view and modify the values for delivered task categories.

Rename and modify user-defined task categories or the delivered PeopleSoft OTHER and OTHER2 task categories.

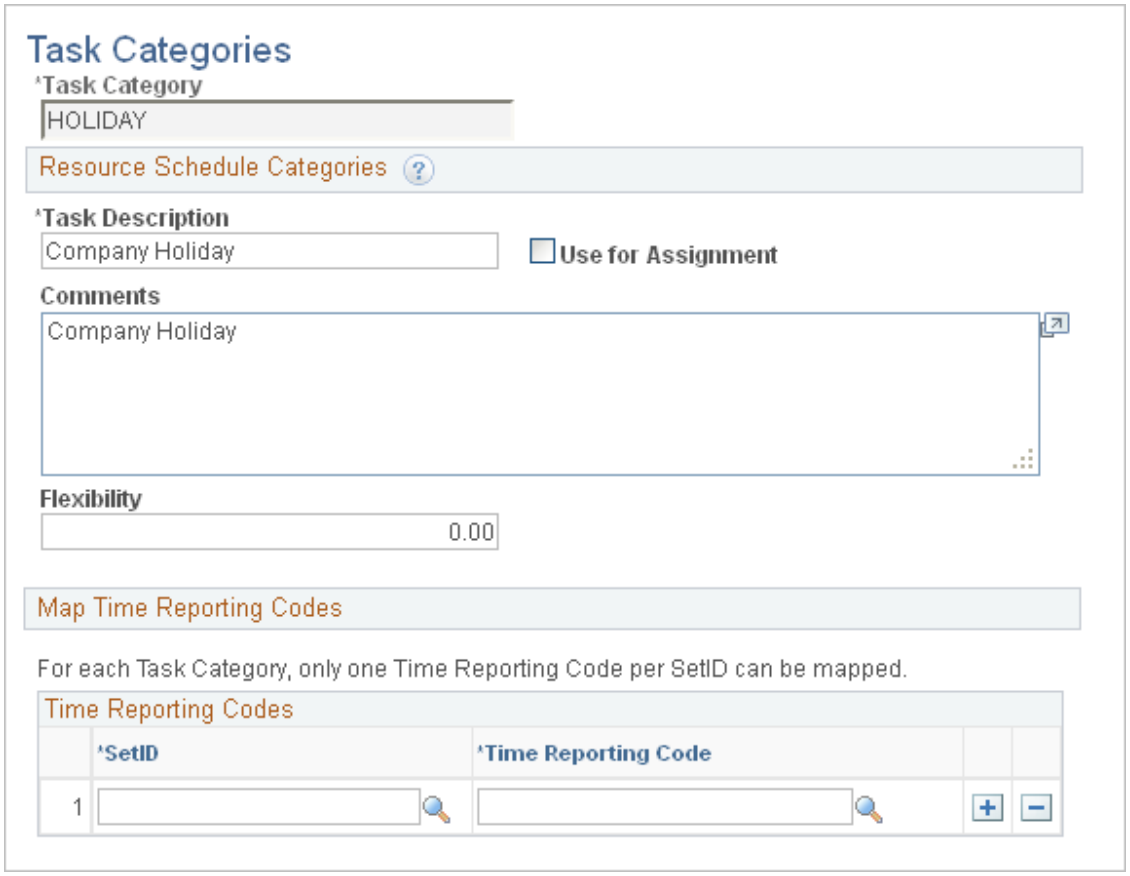
Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Resource Management**, and then **Calendar**, and then **Setup RM Task Categories**

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

This example illustrates the fields and controls on the Task Categories Page. You can find definitions for the fields and controls later on this page.

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Resource Schedule Categories

Field or Control	Description
Task Description and **Comments**	Enter or modify information for task categories that you create, modify information for *OTHER* or *OTHER2* task categories, or view PeopleSoft task category information.
Use for Assignment	Select this check box to make the task category available for assignments; deselect it to make the task category available for appointments.
Flexibility	Enter the percentage that represents flexibility of tasks in this category. For assignment type tasks, this applies to the *Assigned* or *Pending Approval* status. The higher the value, the more flexible the task. Tasks that are in a category with a high flexibility percentage are considered more likely to be rescheduled.

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Field or Control	Description
Reserved Status Flexibility	For assignment type tasks, enter the percentage that represents the flexibility of the task in this category with a status of *Reserved.* The higher the value, the more flexible the task. This field is available when you select the **Use for Assignment** check box. **Note:** This field only displays if the **Use for Assignment** check box is selected. If you select this check box, you must then save the page in order for the **Reserved Status Flexibility** field to display.

Map Time Reporting Codes

This group box appears if you use the Services Forecasting feature that is available with PeopleSoft Program Management.

Field or Control	Description
SetID	Enter the SetID for this task category. The system uses the SetID according to the resource's general ledger business unit to determine which task-category-and-TRC map to follow. This field is required if you want to map the task category to a TRC for use in the Services Forecasting feature in PeopleSoft Program Management.
Time Reporting Code	Enter the TRC for this task category. For each category, enter only one TRC per SetID. This field is required if you want to map the task category to a TRC for use in the Services Forecasting feature in PeopleSoft Program Management.

Related Topics

- PeopleSoft Program Management: Setting Up TRCs and Mapping Task Categories

Defining Holidays on Resource Schedules

This topic lists a prerequisite and discusses how to define holidays on all resource schedules.

Pages Used to Define Holidays on Resource Schedules

Page Name	Definition Name	Usage
Load Holidays Page	RUN_RS_HOLIDAY	Load or update holidays on all resource schedules.
Monthly Schedule Page	RS_SCHED_MONTH	Load holidays on individual resource schedules.

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Prerequisite

Before running the Holiday Load process, you must establish at least one holiday for every Holiday Schedule (HOLIDAY_SCHEDULE) that is assigned to eligible resources (employees and non-employees), and every resource must be assigned a holiday schedule on the Job record (JOB).

Load Holidays Page

Use the Load Holidays page (RUN_RS_HOLIDAY) to load or update holidays on all resource schedules.

Navigation:

Set Up Financials/Supply Chain, and then **Common Definitions**, and then **Resources Data**, and then **Load Holidays**

The duration of each holiday that is added to resource schedules is specified in the appropriate holiday calendar. If the calendar does not specify the duration, the holiday hours are based on the calendar options that are defined on the **Holiday Hours From** field on the Resource Setup-Common Installation Options page.

See Application Fundamentals: Setting Up Resources.

The Holiday Load process associates the SCHEDULED_HOLIDAY task category with all holidays on the holiday schedule that is defined on the Holiday Schedule Table component (RS_CM_HOLIDAY_CMPT).

> **Note**
>
> If PeopleSoft Program Management is installed, or the *Do not schedule assignments on Holidays* option is selected on the Installation Options - Resource Management page, the system does not schedule resource assignments during a holiday that has a Scheduled Holiday task category.

Refreshing Holidays

If you integrate with PeopleSoft Human Capital Management (PeopleSoft HCM), you must run the Holiday Load process at installation and when you add a new year to the holiday schedule. For other routine changes, application messages are used to monitor changes to the holiday schedule in the employee source database (HCM).

If you do not integrate with PeopleSoft HCM, you must run the Holiday Load process when you:

- Install PeopleSoft Resource Management.
- Change, add or delete one or more holidays on the holiday schedule.
- Add a new year of holidays to the holiday schedule.
- Change the *Do not schedule assignments on Holidays* option on the Installation Options - Resource Management page.

The Holiday Load process applies changes to a resource schedule if the resource's holiday schedule is affected.

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Related Topics

- Application Fundamentals: Defining Resource Management Installation Options

Monthly Schedule Page

Use the Monthly Schedule page (RS_SCHED_MONTH) to load holidays on individual resource schedules.

Navigation:

- **Resource Management**, and then **Maintain Schedules**, and then **Rvw Resource Monthly Schedule**
- **Resource Management**, and then **Maintain Schedules**, and then **My Monthly Schedule**, and then **Monthly Schedule**

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

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Enabling Service Orders

Understanding Service Orders

In PeopleSoft Resource Management, you use service orders to submit, track, and fulfill requests for services from external or internal customers. You create a service order to define the required services for a project and specify the criteria that the system uses to locate the appropriate resources. Users with different roles in the organization have access to service orders.

This section discusses:

- Service order priorities.
- Service order defaults.
- Qualification profiles.
- Service order templates.

Service Order Priorities

Service order priorities define the importance levels that you can assign to service orders. You specify a default value for service order priority at an organizational level. Priority is an informational field; it does not control service order processing. You can filter service orders by priority on the Service Order Listing report. After defining priority levels, you can specify the priority default value that appears on all new service orders.

You must define service order priorities before you create service orders.

Service Order Defaults

You can specify service order default values at an individual user level to speed service order entry. A PeopleSoft user with the authority to create a service order can specify a default value for the owning business unit, owning organization, and the person responsible for staffing service orders. An administrator can specify default values for other PeopleSoft users. You can override service order default values on the service order.

Service order defaults are optional.

Qualification Profiles

A qualification profile predefines the standard traits for a specific job role, such as project manager or sales consultant, and stores them as a template for future use. A user who creates new service orders can use qualification profiles to identify the qualifications that are necessary for each resource request. When a qualification profile is selected, it populates the resource request with the competencies, desired levels of proficiency, importance settings, and accomplishments as defined on the qualification profile.

You can also associate a qualification profile with a project role in PeopleSoft Program Management. The qualifications on the Qualification Profile page appear as default values on

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the Update Generic Resource Qualifications page for a generic resource's primary project role. This association of qualification profiles with project roles is especially useful when you create service orders or initiate express searches for generic resources in PeopleSoft Program Management. The qualifications from the Update Generic Resource Qualifications page for the generic resource automatically appear as default values on these pages:

- The generic resource request that you create by changing the generic resource's status to *Requested* on the Resources page.
- The service order resource request that you create for the generic resource from the Manage Generic Resource page.
- The Express Search page that you initiate for the generic resource from the Resources page.

The SetID is a key field on the qualification profile. You can select a qualification profile on a resource request if the business unit on the service order shares the same SetID as the profile. Create qualification profiles with a shared SetID if you have multiple business units that deliver identical services.

Qualification profiles are optional.

Service Order Templates

A service order template reduces the amount of work needed to create a service order by populating many of the fields with values that you define in advance. A service order template can include service order summary information and details for resource request lines.

Service order templates are optional.

Defining Service Order Priorities

To define service order priorities, use the Service Order Priority component (RS_SO_PRIORITY).

This topic discusses how to establish or modify service order priorities.

> **Note**
>
> This topic is required. You must complete the tasks that are discussed in this topic to enable service orders in PeopleSoft Resource Management.

Page Used to Define Service Order Priorities

Page Name	Definition Name	Usage
Service Order Priority Page	RS_SO_PRIORITY	Establish or modify service order priorities.

Service Order Priority Page

Use the Service Order Priority page (RS_SO_PRIORITY) to establish or modify service order priorities.

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Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Resource Management**, and then **Setup RM Service Order Pri**

Field or Control	Description
Sequence Number	Enter the relative importance of the priority. Assign the lowest number to the highest priority.
Description	Enter the name of the code.
Comment	Enter comments that describe the code.

Defining Service Order Defaults

To define service order defaults, use the My Service Order Defaults component (RS_OPR_OPTIONS_EM) or the Service Order Defaults component (RS_OPR_OPTIONS).

This topic lists a prerequisite and discusses to how to specify service order default values.

> **Note**
>
> This topic is optional. If you do not plan to use service order defaults in PeopleSoft Resource Management, you do not need to complete the tasks that are discussed in this topic.

Pages Used to Define Service Order Defaults

Page Name	Definition Name	Usage
Service Order Defaults for <User> Page	RS_OPR_OPTIONS	Specify default values for the person responsible for staffing the order, the owning business unit, and the owning organization for service orders entered by the user.
Service Order Owning Organization - Select an Organization Page	RS_ORGTREESEL_SEC	Enter the default owning organization for service orders that are entered by the user. Defining Owning Organizations

Prerequisite

You must define an organizational tree before you can define service order default values.

See Understanding the Organizational Unit Tree Structure.

Service Order Defaults for <User> Page

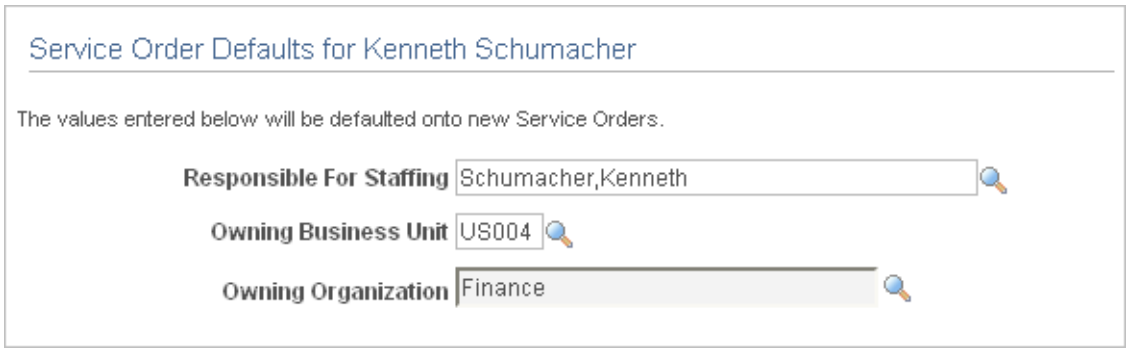
Use the Service Order Defaults for <User> page (RS_OPR_OPTIONS) to specify default values for the person responsible for staffing the order, the owning business unit, and the owning organization for service orders entered by the user.

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Navigation:

- **Resource Management**, and then **Define User Options**, and then **My Service Order Defaults**
- **Set Up Financials/Supply Chain**, and then **Product Related**, and then **Resource Management**, and then **Setup RM Service Order Default**

This example illustrates the fields and controls on the Service Order Defaults for <user> page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Responsible For Staffing	Enter the staffing coordinator or other person responsible for fulfilling the service order. The person responsible for staffing receives new service orders submitted by the user. The service orders appear on the Fulfill Orders tab of the Staffing Workbench. In addition, if the service order workflow option is enabled on the Resource Management Options page for the service order business unit, the person who is responsible for staffing also receives a workflow notification for new orders submitted by the user.
Owning Business Unit	Enter the business unit to appear as the default owning business unit for new service orders entered by the user. This value determines the organizational tree from which you can select the default owning organization. **Note:** You must select an owning business unit before you can select an owning organization.

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Field or Control	Description
Owning Organization	Enter the organization to appear as the default owning organization for new service orders entered by the user. This is the organizational unit that is responsible for the order, such as an organization that sells services to a customer and must ensure that the order is fulfilled. **Note:** You cannot type the default Owning Organization field value; you must select it from the organizational unit tree on the Service Order Owning Organization - Select an Organization page that you access by clicking the **Select an Organization** lookup icon. See Defining Owning Organizations.

Creating Qualification Profiles

To create qualification profiles, use the My Qualification Profiles component (RS_RESRC_TEMPLT_SC) or the Qualification Profiles component (RS_RESRC_TEMPLT).

This topic provides an overview of the steps to create a qualification profile and discusses how to create and update qualification profiles.

> **Note**
>
> This section is optional. If you do not plan to use qualification profiles in PeopleSoft Resource Management, you do not need to complete the tasks that are discussed in this section.

Pages Used to Define Qualification Profiles

Page Name	Definition Name	Usage
Qualification Profile Page	RS_RESRC_TEMPLT	Create or modify qualification profiles for other users (if you are an administrator) or for yourself. Creating and Updating Qualification Profiles
Competencies Page	RS_RESRC_TMPL_COMP	Add, delete, or modify competencies on the qualification profile. Creating and Updating Qualification Profiles
Delete Confirmation Page	EO_DEL_CONFIRM	Accept or cancel the action to delete an accomplishment from the qualification profile. Creating and Updating Qualification Profiles

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Understanding the Steps to Create a Qualification Profile

Follow these steps to create a qualification profile:

1. Enter a SetID for the qualification profile. You can create a qualification profile for any SETID.

   The SetID value is your human resource (HR) business unit if you are creating a qualification profile for your own use.
2. Enter the name of the qualification profile.
3. (Optional) Define the job tasks associated with the qualification profile if you are using PeopleSoft Human Capital Management (PeopleSoft HCM) as the employee source database.
4. Complete all of the information that is relevant to the qualification profile.

Creating and Updating Qualification Profiles

This section discusses how to build or modify qualification profiles for your own use or to share among specific SetIDs. You can specify:

- The profile description.
- The role competencies and job task in PeopleSoft HCM that are associated with the profile.
- Profile competencies.
- Profile accomplishments.

Defining the Profile Description

Use the Qualification Profile page (RS_RESRC_TEMPLT) to create or modify qualification profiles for other users (if you are an administrator) or for yourself.

Navigation:

- **Resource Management**, and then **Define Templates**, and then **Qualification Profiles**, and then **Qualification Profile**
- **Resource Management**, and then **Define Templates**, and then **My Qualification Profiles**, and then **Qualification Profile**

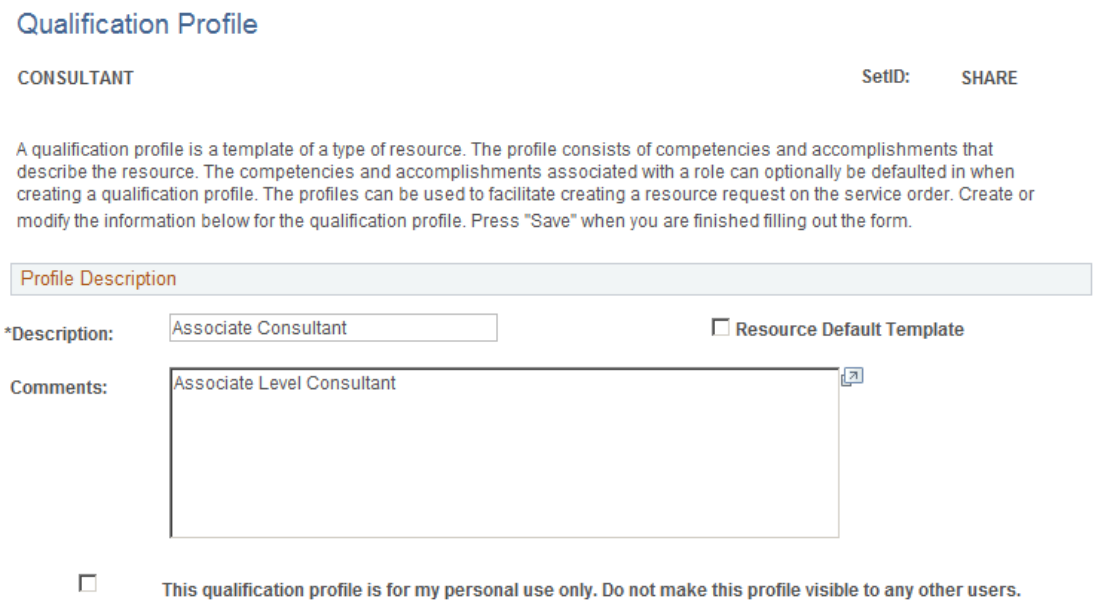
At the prompt, select the appropriate SetID if you are building a qualification profile for users in a SetID to share. The SetID value is your HR business unit if you do not have access to build qualification profiles for other SetIDs.

Enter the name of the profile you want to define.

Go to the **Profile Description** group box.

This example illustrates the fields and controls on the Profile Description group box on the Qualification Profile page. You can find definitions for the fields and controls later on this page.

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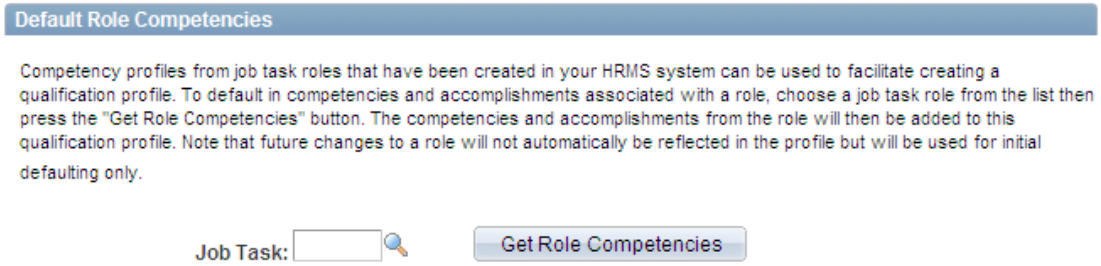
Field or Control	Description
Description	Enter a description so that users can identify the profile.
Comments	Enter relevant comments such as the profile's purpose, the type of resource it represents, its creator, or the date of the last modification.
Resource Default Template	Select this check box if you want to set a Qualification Profile to be displayed as the default qualification profile on the Express Search page. One Qualification Profile for each SETID can be set as the default profile for display on the Express Search page. **Note:** The **Resource Default Template** check box is available only when a user accesses the Qualification Profile page using the navigation —**Resource Management**, and then **Define Templates**, and then **My Qualification Profile Tmplt** This check box is not available if the Qualification Profile page is accessed using **Resource Management**, and then **Define Templates**, and then **RM Qualification Profile Tmplt**.
This qualification profile is for my personal use only. Do not make this profile visible to any other users.	Select this check box to make the qualification profile visible to the current user only. Deselect to make the profile visible to all users who belong to a PeopleSoft business unit with access to the SetID.

Defining Role Competencies

Go to the Default Role Competencies group box.

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This example illustrates the fields and controls on the Default Role Competencies group box on the Qualification Profile page. You can find definitions for the fields and controls later on this page.



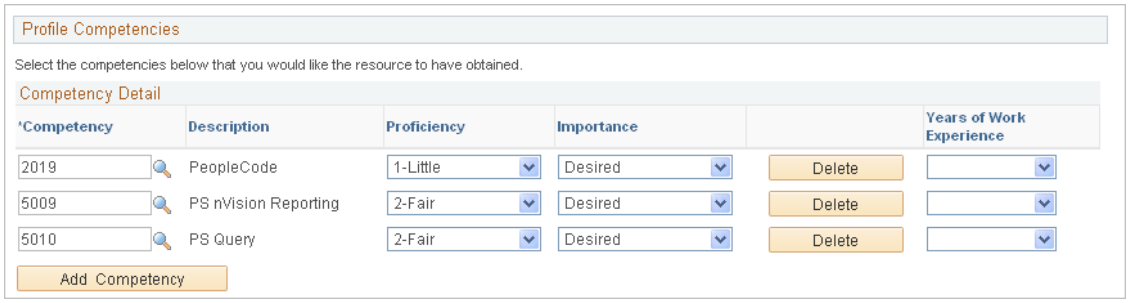
This group box appears if you use PeopleSoft HCM as the only employee source database.

Field or Control	Description
Job Task	Enter the job task that is associated with the qualification profile. When you search for an PeopleSoft HCM job task to associate with this qualification profile, the SetID controls the available tasks. The job tasks that are available to associate with the qualification profile have the same SetID as the profile.
Get Role Competencies	Click to populate the profile with competencies and accomplishments that are associated with the role. The detailed competencies and accomplishments for the role appear in the **Profile Competencies** and **Profile Accomplishments** group boxes on this page. Use this button to create a new profile or to add competencies and accomplishments from a role in PeopleSoft HCM to an existing qualification profile. Changes to a role in PeopleSoft HCM *do not* automatically update the qualification profile.

Defining Profile Competencies

Go to the Profile Competencies group box.

This example illustrates the fields and controls on the Profile Competencies group box on the Qualification Profile page. You can find definitions for the fields and controls later on this page.



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You can modify the competency values that were populated with PeopleSoft HCM values if you associated the qualification profile with a job task.

Field or Control	Description
Competency	Enter the appropriate competency. Click the **Look up Competency** icon to search for a specific competency by competency, description, or category. Competency values are maintained in the employee source database.
Description	Displays the description of the competency. Description values are maintained in the employee source database.
Proficiency	Enter the desired level of proficiency that the resource should possess for this competency.
Importance	Enter *Desired* or *Required* to indicate how important it is for the resource to possess the specified proficiency and number of years of experience for the competency. Designating a competency as required indicates that you will not consider a resource without at least the specified proficiency and requested number of years of experience.
Years of Work Experience	Enter the number of years of work experience that the resource should possess for this competency. You can select from no years to *9+ Years*.
Add Competency	Click to access the Competencies page where you can access the Competency tree (COMPETENCY) and select competencies from competency categories. Alternatively, you can search for a competency by key word or letters. Add, delete, or modify competencies and interests as required, and click **Return to Qualification Profile** to return to the Qualification Profile page.

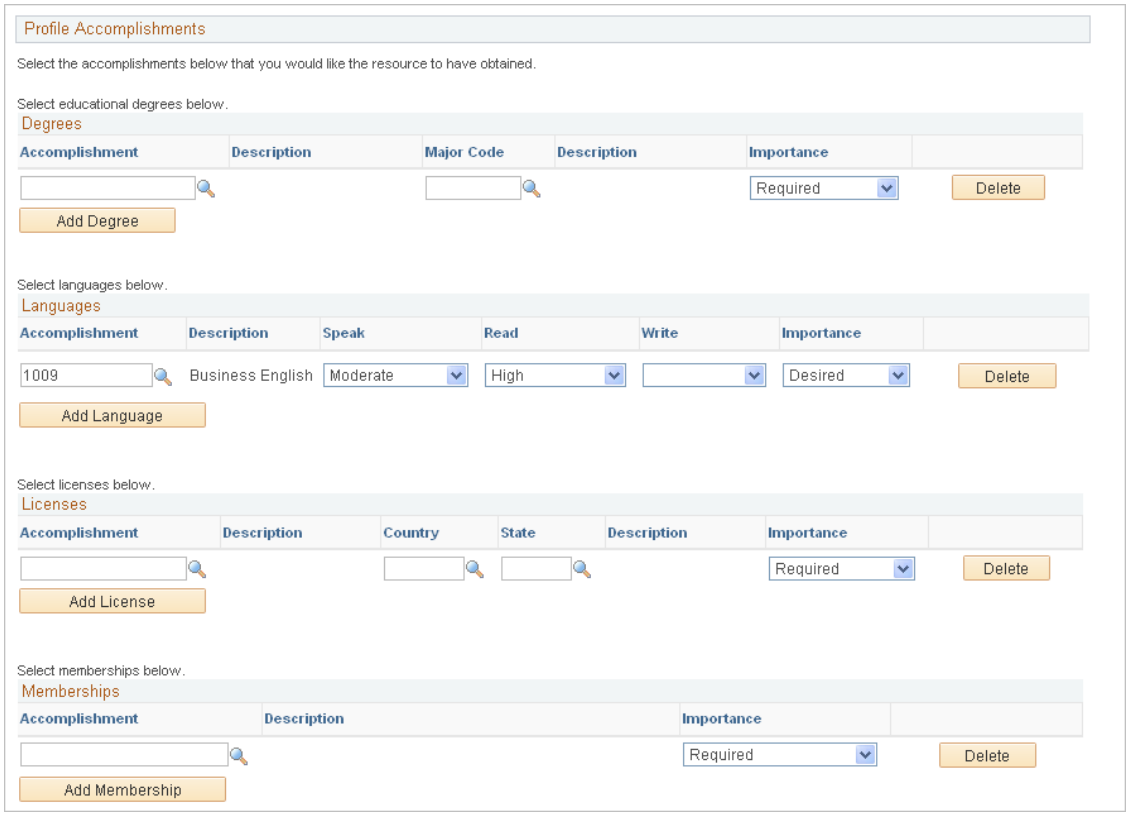
See Competencies Page.

Defining Profile Accomplishments

Go to the Profile Accomplishments group box.

This example illustrates the fields and controls on the Profile Accomplishments group box on the Qualification Profile page. You can find definitions for the fields and controls later on this page.

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In the **Accomplishment** field in each of the four group boxes—**Degrees, Languages, Licenses,** and **Memberships**— select the appropriate accomplishments from the list of all accomplishments stored in the employee source database.

You select an importance rating—desired or required—for each accomplishment. Designating an accomplishment as required indicates that you will not consider a resource without at least the requested accomplishment.

Field or Control	Description
Degrees	Specify a major code for each selected degree, and specify its importance.
Languages	Specify the level of proficiency that the resource should possess to speak, read, and write the selected languages. Indicate the importance of all three.
Licenses	Specify an issuing country and state for the selected licenses. Indicate the importance of both.
Memberships	Specify the importance of each selected membership.
Delete	Click to delete the corresponding row from the accomplishment grid. The Delete Confirmation page appears for you to confirm or cancel the action.

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Creating, Updating, and Deleting Service Order Templates

This topic discusses how to create, update, or delete service order templates.

> **Note**
>
> This section is optional. If you do not plan to use service order templates in PeopleSoft Resource Management, you do not need to complete the tasks that are discussed in this section.

Pages Used to Create, Update, and Delete Service Order Templates

Page Name	Definition Name	Usage
Service Order Template - Resource Request Page	RS_SO_TMPLT_REQS	Store common resource request details that you can use to populate new service orders. Creating and Updating Service Order Templates
Service Order Template - Order Summary Page	RS_SO_TMPLT_SUM	Store common service order summary information that you can use to populate new service orders. Creating and Updating Service Order Templates
Resource Management User Options - Select an Organization Page	RS_ORGTREESEL_SEC	Select the default organization that is responsible for delivering services. Creating and Updating Service Order Templates
Service Order - Additional General Information Page	RS_SO_SUMM_MORE	Enter values for flexible resource attributes for the resource request line on the template. Creating and Updating Service Order Templates
Service Order - Location and Contact Details Page	RS_REQ_LOCCNTC_SEC	Enter location and contact information for the resource request line on the template. Creating and Updating Service Order Templates
Delete Service Order Template Page	RS_SO_DELTEMPLATE	Delete a service order template.

Creating and Updating Service Order Templates

This section discusses how to:

- Define resource request template details.

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- Define the order summary template.

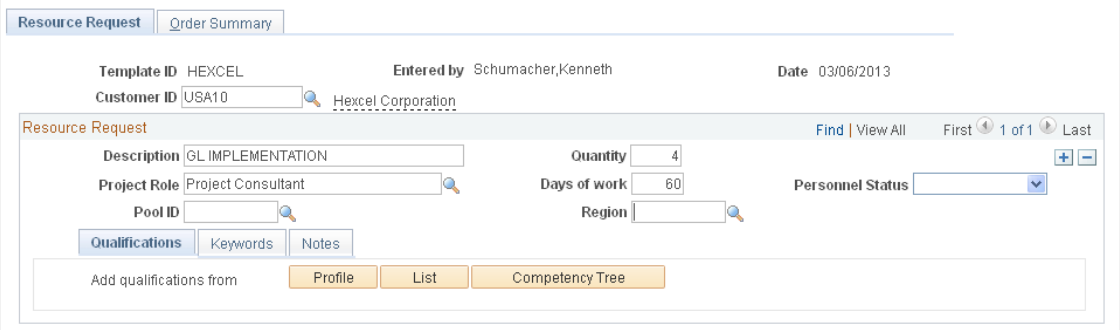
Defining Resource Request Template Details

Use the Service Order Template - Resource Request page (RS_SO_TMPLT_REQS) to store common resource request details that you can use to populate new service orders.

Navigation:

Resource Management, and then **Define Templates**, and then **Service Order Template**, and then **Resource Request**

This example illustrates the fields and controls on the Service Order Template - Resource Request page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Template ID	Assign a unique service order template ID when you access the Service Order Template component (RS_SO_TMPLT). **Note:** All service order IDs and service order template IDs must be unique.
Customer ID	(Optional) Enter a customer ID.
Resource Request	(Optional) Enter information in any resource request field that commonly appears in recurring service orders. See Resource Requests Page.

Defining the Order Summary Template

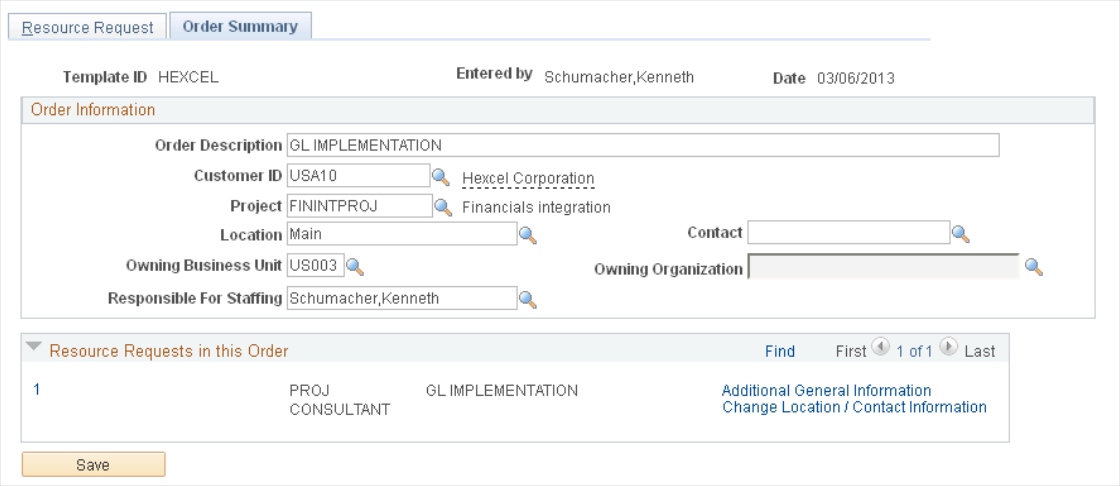
Use the Service Order Template - Order Summary page (RS_SO_TMPLT_SUM) to store common service order summary information that you can use to populate new service orders.

Navigation:

Resource Management, and then **Define Templates**, and then **Service Order Template**, and then **Resource Request**, and then **Order Summary**

This example illustrates the fields and controls on the Service Order Template - Order Summary page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Order Information	Enter order information that commonly appears in recurring service orders. The field values that you enter here appear in the order summary on new service orders when you use the template to create a new service order. **Note:** You cannot type the default Owning Organization field value; you must select it from the organizational unit tree on the Resource Management User Options - Select an Organization page that you access by clicking the **Select an Organization** lookup icon. See Order Summary Page.
Additional General Information	Click this link to enter additional attribute values for an individual resource request line. See Service Order - Additional General Information Page.
Change Location / Contact Information	Click this link to specify a different location or contact for an individual resource request line. See Service Order - Location and Contact Details Page.

Delete Service Order Template Page

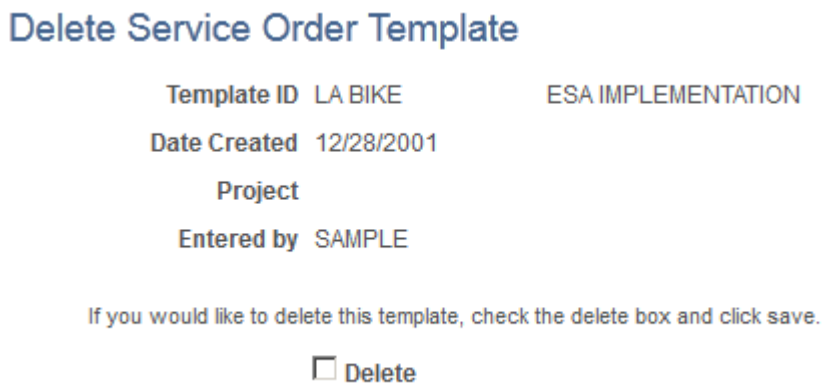
Use the Delete Service Order Template page (RS_SO_DELTEMPLATE) to delete a service order template.

Navigation:

Resource Management, and then **Define Templates**, and then **Delete Service Order Template**

This example illustrates the fields and controls on the Delete Service Order Template page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Template ID	Enter the template to delete from the Delete Template search page.
Delete	Select the **Delete** check box to delete the template.
Save	Click **Save** to perform the action.

Existing service orders are not affected when you delete a service order template.

> **Note**
>
> PeopleSoft Resource Management users share service order templates; therefore, only system administrators should have permission to delete the templates.

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17

Working with Resource Pools

Understanding Resource Pools

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

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

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

You can use resource pools to filter resources on the Staffing Workbench and during express searching for resources. You can also use resource pools for approval workflow routing, where pool managers act as resource managers and control the use of the resources in their pools. During system implementation or reorganization of resource pools, an administrator creates pools and associates them in the pool hierarchy.

Typically, there are two functional roles that are associated with resource pools—pool administrator and pool manager. This table discusses each role's tasks in the process:

Role	Responsibility
Pool Administrator	Manages the overall pool hierarchy, has access to all resource pools, and manages reorganizations. Responsibilities include: • Creating pools and the pool hierarchy during implementation and reorganizations, which can occur frequently. • Assigning or modifying pool managers. • Transferring resources between pools. • Modifying resource data in pools, such as start dates, end dates, capacity percent, and so on). • Inactivating pools, moving pools within the hierarchy, or overwriting the entire pool hierarchy.

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Role	Responsibility
Pool Manager	Owns and manages the resource pools and the resources within their pools. Responsibilities include: • Transferring resources between pools. • Modifying resource data within resource pools. • Approving generic resource requests.

Understanding the Unassigned Resources Pool

Resource pools are required for PeopleSoft Resource Management resources, and there must always be an active pool in the system. The system uses the *Unassigned Pool* (pool ID 0000000001), which is delivered with PeopleSoft Resource Management, as the default pool when creating a Resource Management resource.

You can modify the pool name, description, and pool manager, based on your security role, to make the pool more meaningful to the organization.

These are important guidelines for using the *Unassigned Pool:*

- The *Unassigned Pool* must always be at the most outdented level (level 1) of the pool hierarchy.
- You can add child pools to the *Unassigned Pool.*
- You can not modify the status of the *Unassigned Pool* because it must remain active to support the default pool functionality.
- You can not add named resources to the *Unassigned Pool* by using the Pool Resources - Manage Pool Resources page.
- When named resources are removed from any other pool, the system automatically adds them to the Unassigned Pool because each resource must always belong to a pool in PeopleSoft Resource Management.

> **Note**
>
> When you implement PeopleSoft Resource Management, after you establish pool administrators, immediately assign a pool manager to the *Unassigned Pool.*

Understanding Methods of Creating Pools

You can create or modify resource pool assignments by five methods in PeopleSoft Resource Management:

- Create a named resource.
- Add a generic resource directly to the pool.
- Pull a resource from the unassigned pool.
- Batch load resources and pool assignments.
- Transfer resources between pools.

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When you create a resource by using the Create Resources page or the Create Resources Program page, you specify the pools to which the resource belongs. Specifying the pool at the time of resource creation streamlines the process of assigning pools.

Understanding Generic Resources

Adding generic resources to a pool helps the pool manager model future capacity of a pool. For example, a pool manager may be given authorization to hire a database administrator (DBA) in two months. The manager can add the DBA to the pool now as a generic resource, thus enabling the DBA to be included in capacity planning against future demand.

Setting Up Resource Pools

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

This topic discusses how to set up resource pools.

Pages Used to Set Up Resource Pools

Page Name	Definition Name	Usage
Set Up Pool Administrators Page	RS_POOL_ADM	Define resource pool administrators.
Resource Pool Page	RS_RES_POOL	Add or modify resource pools.
Pool Hierarchy Page	RS_POOL_HRCHY	Establish the resource pool hierarchy.

Set Up Pool Administrators Page

Use the Set Up Pool Administrators page (RS_POOL_ADM) to define resource pool administrators.

Navigation:

Setup Financials/Supply Chain, and then **Product Related**, and then **Resource Management**, and then **Resource Pools**, and then **Setup RM Pool Administrators**

Field or Control	Description
Pool Administrator Id	Add at least one pool administrator during implementation to create pools and the pool hierarchy. You can choose any operator ID in the system. You can define any number of pool administrators, but it is recommended that you define no more than three.

Resource Pool Page

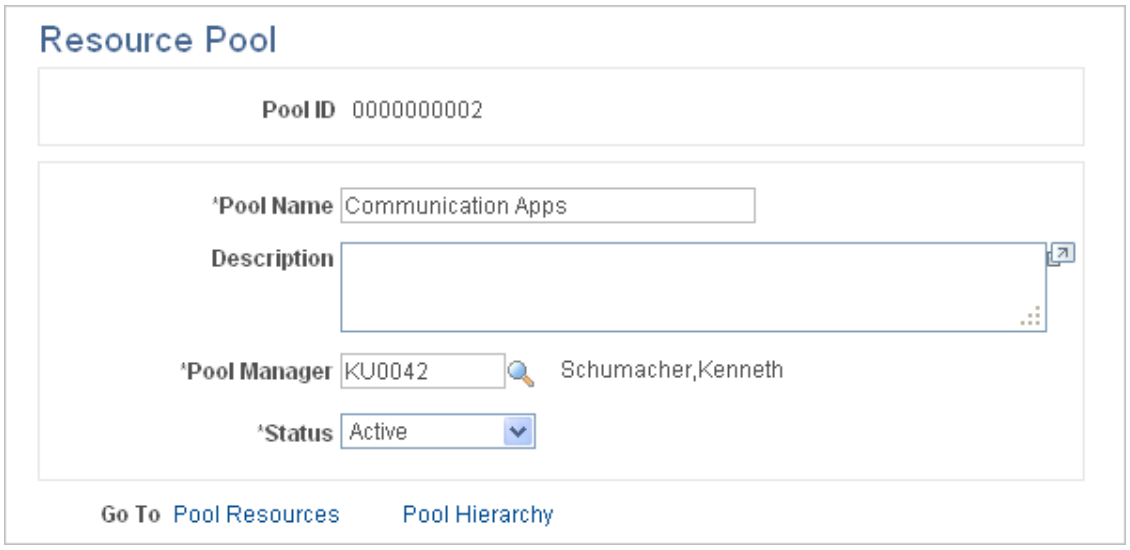
Use the Resource Pool page (RS_RES_POOL) to add or modify resource pools.

Navigation:

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Setup Financials/Supply Chain, and then **Product Related**, and then **Resource Management**, and then **Resource Pools**, and then **Setup RM Resource Pools**

This example illustrates the fields and controls on the Resource Pool page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Pool ID	Displays the system-generated pool identifier. This key field is assigned sequentially when you add a pool.
Pool Name	Enter a name for the pool, which you can modify when necessary.
Pool Manager	Enter the pool manager. You can select any employee in the system, even if the employee is not established as a resource in PeopleSoft Resource Management. Pool managers can receive workflow to approve assignments or allocations for resources in their respective pools.
Status	Select *Active* or *Inactive*. Pool managers can change the status of their own pools and any child pools. You can change inactive pools to an active status at any time. Only active pools appear in the pool hierarchy.
Pool Resources	Click to access the Pool Resources - Manage Pool Resources page to view and modify the resources of the selected pool.
Pool Hierarchy	Click to access the Pool Hierarchy page to establish the pool organization and relationships.

Pool Hierarchy Page

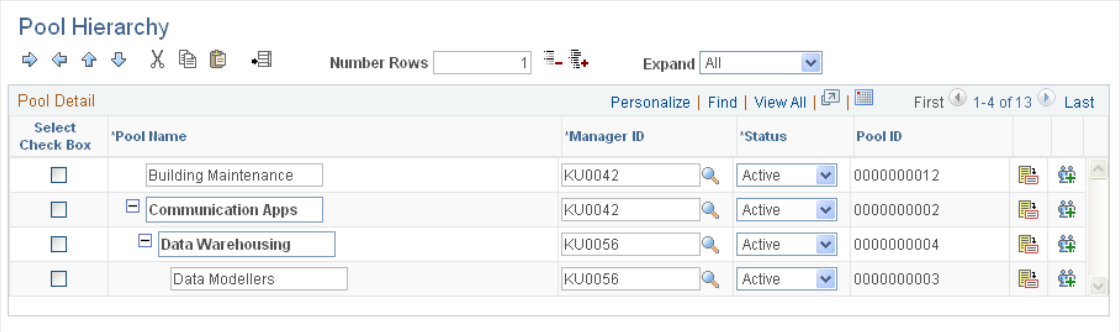
Use the Pool Hierarchy page (RS_POOL_HRCHY) to establish the resource pool hierarchy.

Navigation:

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Resource Management, and then **Manage Resource Pools**, and then **Resource Pool Hierarchy**, and then **Pool Hierarchy**

This example illustrates the fields and controls on the Pool Hierarchy page. You can find definitions for the fields and controls later on this page.



Select the check box in the first column of the grid to identify the row that you want to modify. You can indent or outdent the selected row, move the selected row up or down in the hierarchy, or add rows below the selected row.

Field or Control	Description
	Click the **Indent** icon to indent a row. This action makes the previous row a parent pool. You can not indent on the first pool in the list, and you can not indent more than one level from its parent row. Indenting a summary pool also indents all of its child pools.
	Click the **Outdent** icon to outdent a pool, which moves the selected row down one level. You cannot outdent a row that is already at the most outdented level. Outdenting a summary pool also outdents all of its children. Outdenting a row with siblings makes the selected row the parent of its siblings; the selected pool becomes a parent pool.
	Click the **Move Up** icon to move a row above the previous row. If the selected row is a parent pool, all of its child pools also move up. The pool that you move up inherits the more indented hierarchy level of the pool above and below the moved pool.
	Click the **Move Down** icon to move a pool below the following row. If the selected row is a parent pool, all of its child pools also move down. The pool that you move down inherits the higher hierarchy level of the pool above and below the moved pool.
Number Rows	Enter the number of rows that you want to insert below the selected row and click the **Add** icon to add the rows. The default number of rows is *1*.

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Field or Control	Description
Pool Name	Enter the pool name. Only a pool administrator and the pool manager can modify this field. Pool names are indented or outdented based on their relative hierarchical position.
Manager ID	Enter the pool manager's employee ID. Only a pool administrator can modify this field.
Status	Select *Active* or *Inactive* as the pool status. **Note:** When you inactivate a pool, the system checks to see if any open resource requests specify the pool that you want to inactivate. Inactivating the pool triggers the system to remove the pool from all resource requests with a status of *Open* that specify the pool.
	Click the **View Pool Details** icon to access the Resource Pool page and modify pool details. Only the pool manager, the administrator, or a pool manager from a higher pool in that branch of the hierarchy can access and modify this page.
	Click the **View Pool Resources** icon to access the Pool Resources - Manage Pool Resources page to view and update the selected pool's resources. Only the pool manager, the administrator, or a pool manager from a higher pool in that branch of the hierarchy can access and modify this page.

Managing Pool Resources

This topic discusses how to manage pool resources.

Pages Used to Manage Pool Resources

Page Name	Definition Name	Usage
Pool Resources - Manage Pool Resources Page	RS_POOL_MEMBER	View the resource information for the selected pool.
Pool Resource Detail Page	RS_MBR_DETAILS	View pool resource details and modify membership dates.
Add Named Resource Page	RS_ADD_NAMED	Add named resources to the pool.
Add Generic Resource Page	RS_ADD_GENERIC	Add generic resources to the pool.
Transfer Resource Page	RS_TRANSF_MBR	Transfer named resources from one resource pool to another.
Modify Resource Transfer Page	RS_MODIFY_TRANSF	Modify a pending resource transfer.

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Page Name	Definition Name	Usage
Manage Pool Resources - Delete Confirmation Page	EO_DEL_CONFIRM	Remove a resource from the pool and confirm the deletion. Pool Resources - Manage Pool Resources Page
Resource Pool History Page	RS_POOL_HISTORY	View the pool history for a particular pool. Pool Resources - Manage Pool Resources Page
Supply Category Analytics Page	RS_OCP_POOL_SELECT	View the Supply Category Analytics for a particular pool. Pool Resources - Manage Pool Resources Page
Transfer Assignments Page	RS_TRNSFR_ASSGNMNT	Transfer assignments from one resource to another in a particular pool. Pool Resources - Manage Pool Resources Page

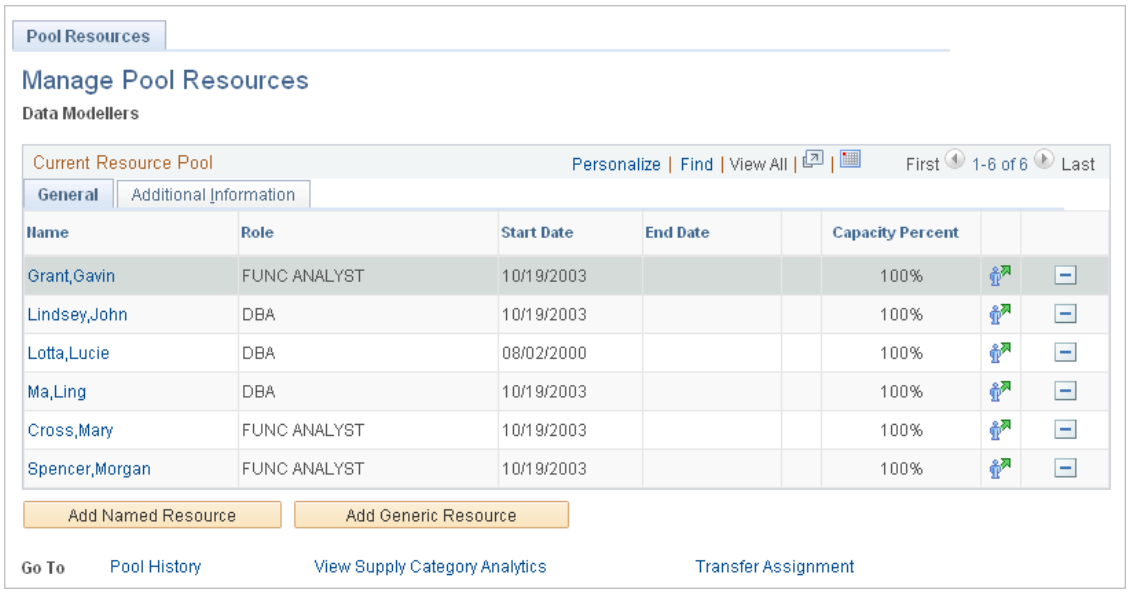
Pool Resources - Manage Pool Resources Page

Use the Pool Resources - Manage Pool Resources page (RS_POOL_MEMBER) to view the resource information for the selected pool.

Navigation:

Resource Management, and then **Manage Resource Pools**, and then **Manage Resource Pool Resources**

This example illustrates the fields and controls on the Pool Resources - Manage Pool Resources page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Name	Click a name link to access the Pool Resource Detail page and view the resource's role, region, and personnel status, add comments, and change pool membership dates and capacity percent.
Start Date and **End Date**	Displays the range of dates in which the resource belongs to the pool. If the resource belongs to the pool for multiple date ranges, the earliest start date and the latest end date appear. Date ranges that are in the past do not appear on this page. You can view historical information on the Resource Pool History page.
	The **Multiple Membership Dates** icon appears next to a date range if the resource has multiple future date rows for the resource pool.
Capacity Percent	Displays the resource's availability percentage from a capacity planning perspective. For example, if the resource is a full-time worker, the percentage is *100%*. If the resource only works half of the standard work week, the capacity percentage is *50%*. You can also use this field to represent a resource who works full-time but whose time is only half allocated to project work that is considered for capacity planning. In this case the capacity is *50%*. The percentage that appears is based on the active capacity percent for the current day that is specified on the Pool Resource Detail page for the resource.
	Click the **Transfer Resources** icon to transfer the resource to another pool.
	Click the **Delete** icon to delete the resource and the resource's history from the pool. Examples of when you might want to delete a generic resource from a pool are if the resource was created in error, if the manager's headcount was removed, or if you found a named resource to replace the generic resource. Deleting a generic resource from a pool also deletes all of the resource's history. Delete named resource only if the resource was added in error; otherwise, transfer the resource. If the named resource has been in the pool multiple times, deleting the resource removes only the resource's most current assignment entry, not the entire history. When you delete named resources from a pool, the system automatically adds them to the Unassigned Pool because each resource must belong to a pool in the system.
Add Named Resource	Click to access the Add Named Resource page and add a named resource to the pool.

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Field or Control	Description
Add Generic Resource	Click to access the Add Generic Resource page and add a generic resource to the pool.
Pool History	Click to access the Resource Pool History page to view pool history details. **Note:** Current resource assignments do not appear on the Resource Pool History page.
View Supply Category Analytics	Click to access the Supply Category Analytic parameters page to select pools and specify search options for the system to use to calculate supply category analytics.
Transfer Assignment	Click to access the Transfer Assignments page to view and transfer, in bulk, future-dated project and activity assignments. This is useful when pool managers know that they are transferring a resource from their pool and need to reassign any future work that is assigned to the resource.

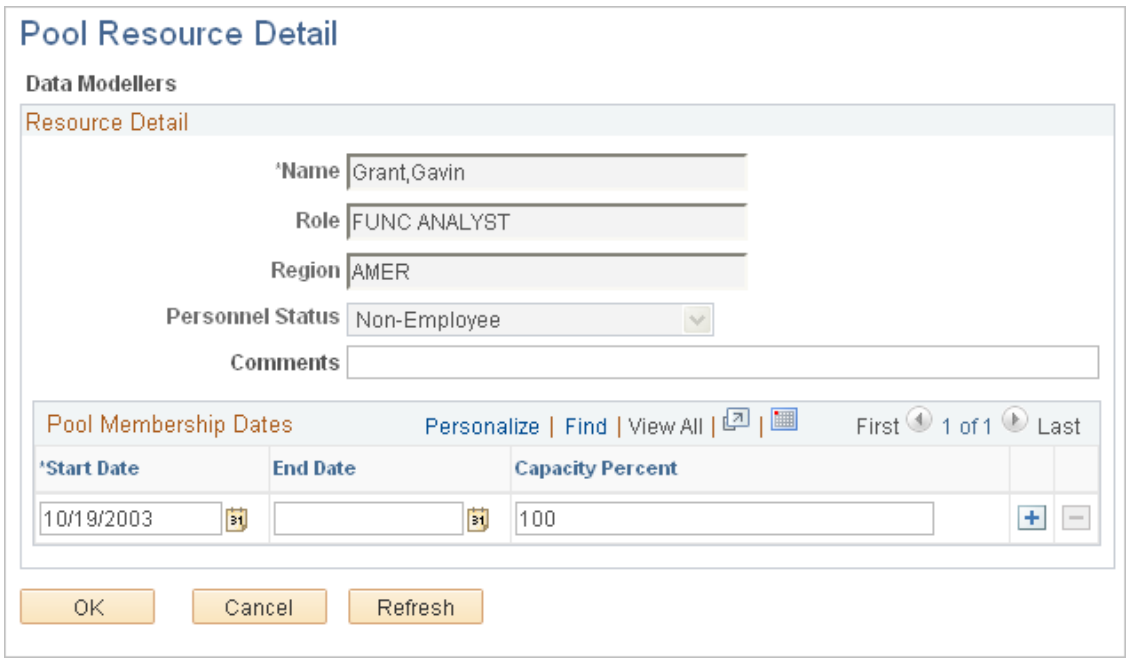
Pool Resource Detail Page

Use the Pool Resource Detail page (RS_MBR_DETAILS) to view pool resource details and modify membership dates.

Navigation:

Click a link in the Name column on the Pool Resources - Manage Pool Resources page.

This example illustrates the fields and controls on the Pool Resource Detail page. You can find definitions for the fields and controls later on this page.



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Pool Membership Dates

Any date periods with an end date that is greater than the current date appear in this grid. You can add different date ranges with different capacity percentages for the same resource.

Field or Control	Description
Start Date, End Date, and **Capacity Percent**	Enter the specific additional start and end dates for a resource to have multiple date ranges in the same resource pool. Date ranges cannot overlap in the grid and must not overlap with dates for that resource in any other pool besides the Unassigned Pool. After you specify multiple date ranges for a resource, the earliest start date and latest end date appear on the Pool Resources - Manage Pool Resources page. The capacity percent that appears on the Pool Resources - Manage Pool Resources page is current for today's date.

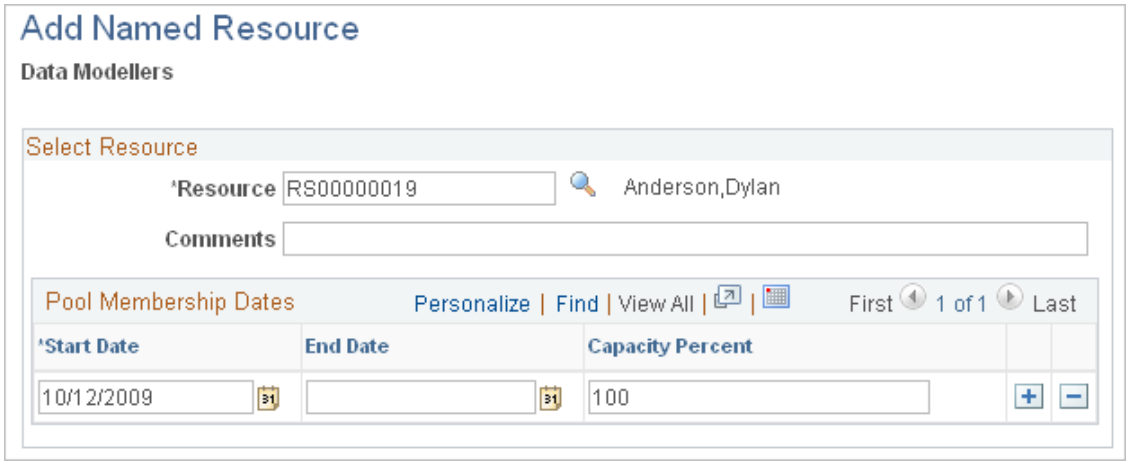
Add Named Resource Page

Use the Add Named Resource page (RS_ADD_NAMED) to add named resources to the pool.

Navigation:

Click the **Add Named Resource** button on the Pool Resources - Manage Pool Resources page.

This example illustrates the fields and controls on the Add Named Resource page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Resource	Click the **Lookup Employee** icon to search for a resource from the Unassigned pool. When you add named resources to the pool with this method, you can only select resources that are currently belong to the Unassigned pool.
Comments	Enter additional comments to describe the resource.
Start Date	Enter the start date of the resource for this pool. This field is required. The start date must be greater than or equal to the start date of the resource in the Unassigned pool and less than or equal to the end date of the resource in the Unassigned pool.
End Date	Enter the end date of the resource for this pool. This field is optional because upon hiring the resource, you may not know when the resource is going to leave the pool. If the resource is part of another pool in the future, the end date on this pool cannot overlap the resource's pool assignment in another pool.
Capacity Percent	Enter a percentage for the resource. This value represents the availability of the resource from a capacity planning perspective. For example, if the resource is a full-time worker, enter *100* for 100 percent. If the resource works only half of the standard work week, enter *50* for 50 percent. This field is required. The value must be greater than or equal to *0* and less than or equal to *100*.

Add Generic Resource Page

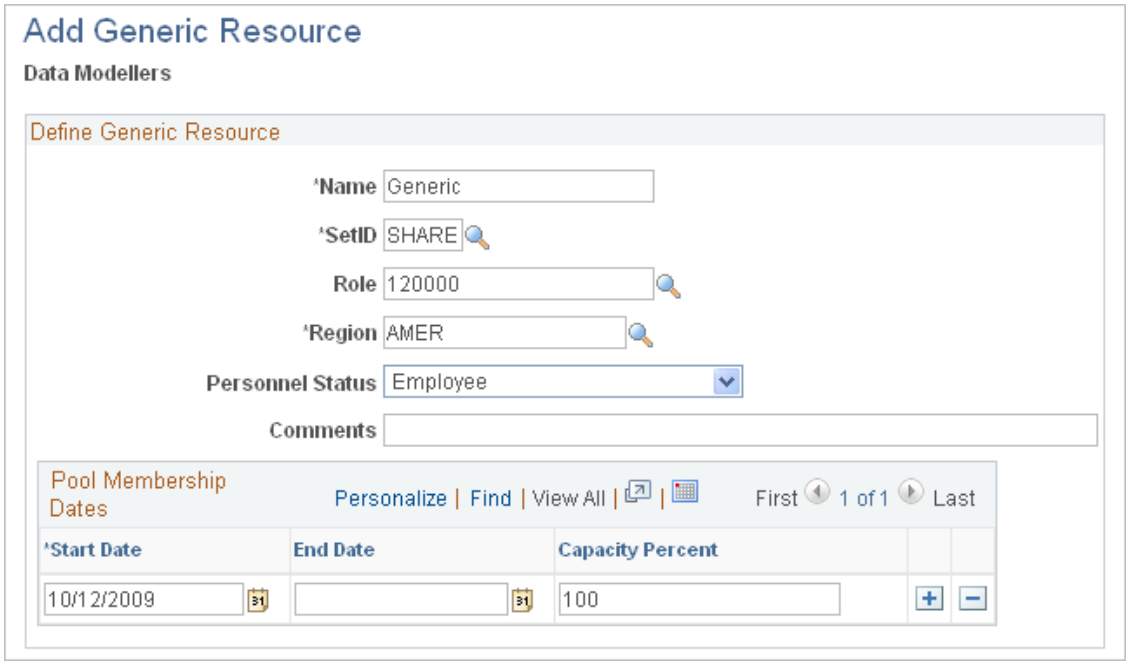
Use the Add Generic Resource page (RS_ADD_GENERIC) to add generic resources to the pool.

Navigation:

Click the **Add Generic Resource** button on the Pool Resources - Manage Pool Resources page.

This example illustrates the fields and controls on the Add Generic Resource page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Name	Enter a descriptive name of the resource that you plan to hire, such as *Generic Developer,* that will help you distinguish this resource from others in the list.
SetID and **Role**	Enter the appropriate SetID and role from the Project Role table (PROJ_ROLE). This value is the resource's role for that particular pool, such as *Staff Developer*. Although resources can have multiple roles in an organization based on the project, the value in this **Role** field is the primary role and is used for capacity planning.
Region	Enter the region in which the resource is needed. Available values are from the Region Code table (REGION_CD) for the PeopleSoft Resource Management region category ID.
Personnel Status	Select *Employee* or *Non-Empl* (non-employee, such as a contractor) to designate the personnel type of the generic resource.
Pool Membership Dates	Enter the dates and capacity percent in this grid for the generic resource.

Transfer Resource Page

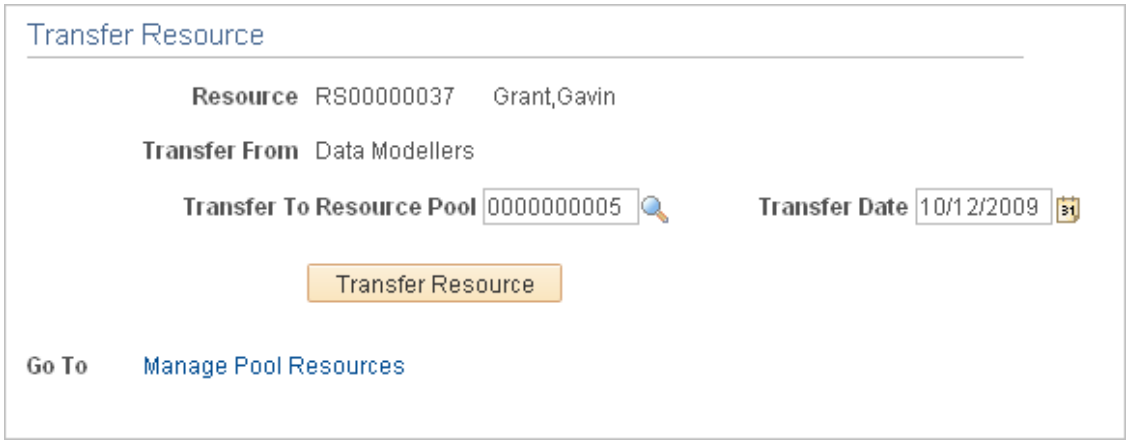
Use the Transfer Resource page (RS_TRANSF_MBR) to transfer named resources from one resource pool to another.

Navigation:

Click the **Transfer Resources** icon on the Pool Resources - Manage Pool Resources page.

This example illustrates the fields and controls on the Transfer Resource page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Resource	Displays the resource ID and resource name from the row in which you clicked the **Transfer Resource** icon on the Pool Resources - Manage Pool Resources page.
Transfer From	Displays the pool from which you navigated on the Pool Resources - Manage Pool Resources page.
Transfer To Resource Pool	Enter the resource pool to which you want to transfer the corresponding resource. You can select any active pool, including the *Unassigned Pool*. You can only select one pool. If you select the pool to which the resource currently belongs, an error message appears when you confirm the transfer.
Transfer Date	Enter the effective date of this transfer. You can enter any calendar date that is on or after the current date. **Note:** The transfer date is the start date of the resource in the transfer-to pool. The transfer-from pool is populated with the end date, which is the first calendar day preceding the transfer date. **Note:** You cannot enter a past date as the transfer date.

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Field or Control	Description
Transfer Resource	Click to complete the transfer resource process. The system checks to see if any pending Assignment Approval or Assignment Date Change workflow exists. If pending workflows exist, a warning message appears asking if you want to cancel the resource's pending Assignment Approval or Assignment Date Change workflow. Click **Yes** for the transfer process to cancel the pending (incomplete) workflow. Click **No** to cancel the transfer process and return to the Transfer Resource page. Oracle recommends that users manually resolve all outstanding assignment workflow before transferring a resource so they will know the potential resource assignments and date changes for the resource.

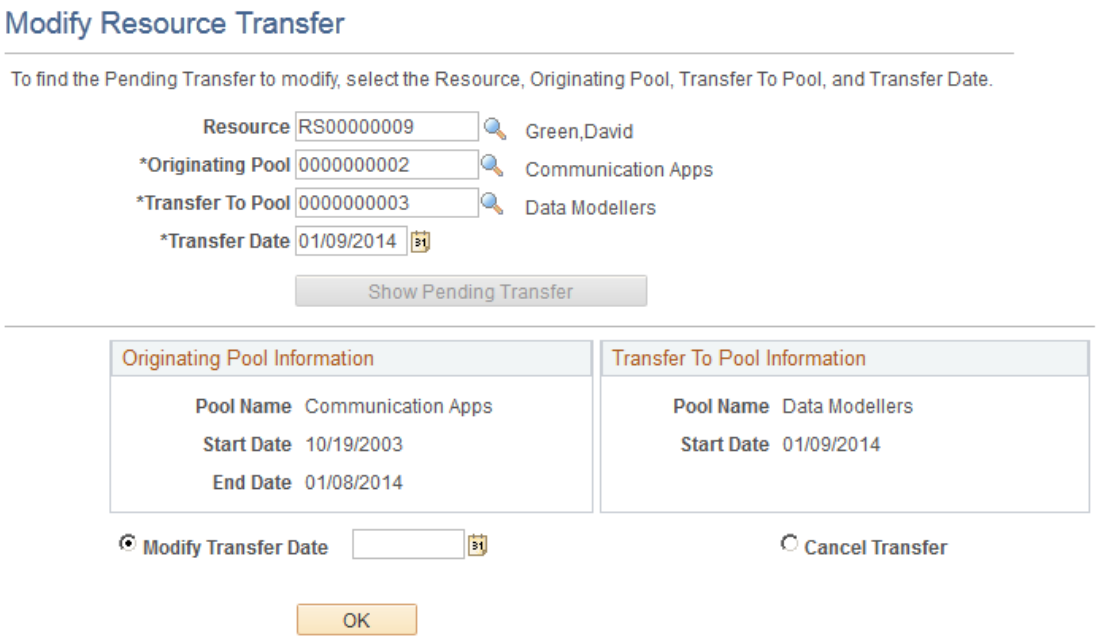
Modify Resource Transfer Page

Use the Modify Resource Transfer page (RS_MODIFY_TRANSF) to modify a pending resource transfer.

Navigation:

Resource Management, and then **Manage Resource Pools**, and then **Modify Resource Transfer**, and then **Modify Resource Transfer**

This example illustrates the fields and controls on the Modify Resource Transfer page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Resource	Enter the employee ID of the resource with the pending transfer.
Originating Pool	Enter the resource pool name from which this resource is scheduled for transfer.
Transfer To Pool	Enter the resource pool name to which this resource is scheduled for transfer.
Transfer Date	Enter the resource's original transfer date that you want to modify.
Show Pending Transfer	Click to view the **Originating Pool Information, Transfer to Pool Information,** and action buttons.
Modify Transfer Date	Select to modify the transfer date; enter the new transfer date.
Cancel Transfer	Select to cancel the transfer.
OK	Click to perform the action of modifying the transfer date or canceling the transfer.

Loading Resource Pool Information in Batch

This topic provides an overview of the Resource Pool Import utility.

Page Used to Load Resource Pool Information in Batch

Page Name	Definition Name	Usage
Mass Pool Changes Page	RS_MASSPOOL_RUN	View the status of submitted changes from the Microsoft Excel spreadsheet upload, submit a process to validate pool changes, and submit a process to purge the import table.

Understanding the Resource Pool Import Utility

Assigning pools and tracking pool information is critical to the success and effectiveness of capacity planning. You must be able to load large volumes of resource pool information quickly and efficiently. The Resource Import utility provides an easy way to accomplish this. These two scenarios are examples of when you would typically make batch changes to pool information:

- During implementation to load the initial large volumes of resource information.
- During reorganizations to quickly update pool assignments and rebuild the pool hierarchy in batch.

The system uses a Microsoft Excel file to import mass pool changes. The file is stored in the Excel directory on the drive where PeopleSoft PeopleTools are located. For example, if you store PeopleTools in *c:\pt848,* the Resource Pool Entry.xls spreadsheet is stored in *c:\pt848\excel.*

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

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- Resource Pool Import Utility Home Page: Select the actions to perform for the spreadsheet.
- Pool Modification: Add or modify resource pools.
- Resource Pool Assignments: Add, modify, or delete named resource pool assignments.
- Generic Resource Pool Assignments: Add, modify, or delete generic resource pool assignments.

Use the menu on the Mass Pool Changes page to manage the steps in the import process. To upload the Microsoft Excel file, use the **Submit Pool Changes** link on the Mass Pool Changes page.

To submit batch pool changes, the pool administrator completes these steps:

1. Load or update pool information to the Resource Pool Entry.xls spreadsheet.
2. Click the **Import Pool Data** button on the Resource Pool Import Utility Home Page sheet in the Excel file to initiate the import process.
3. Enter server address and access information to import the resource data and submit the process.

   The data is moved to PeopleSoft staging tables.
4. Access the Mass Pool Changes page in PeopleSoft Resource Management and click the **Submit Validation Process** link for the system to validate the data.
5. If errors occur during processing, click the **Fix Errors** link and correct the errors.
6. Validate the data again by clicking the **Submit Validation Process** link.
7. If errors are still present, repeat Steps 4 and 5 until no errors occur.
8. When no errors occur, click the **Submit Pool Changes** link on the Mass Pool Changes page.

Prerequisite

To use the Mass Pool Changes feature to load changes to resource pools into PeopleSoft Resource Management, users must have access to the WEBLIB_RS web library as part of their permission lists. To enable the Mass Pool Changes feature:

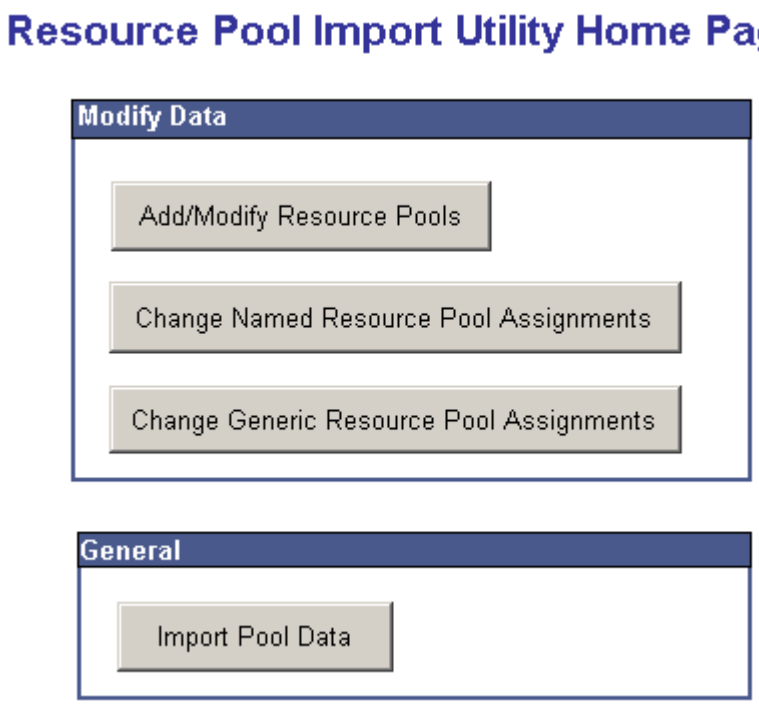
1. Select **PeopleTools**, and then **Security**, and then **Permissions & Roles**, and then **Permission Lists.**
2. Open the appropriate permission list that has access to the WEBLIB_RS web library.
3. Click the **Edit** link for the **WEBLIB_RS** web library name and select Full Access for the POOL_IMPORT.FieldFormula.IScript_Import_Pools function.

Navigating in the Resource Pool Entry Spreadsheet

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

This example illustrates the fields and controls on the Resource Pool Entry.xls file: Resource Pool Import Utility Home Page sheet. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Add/Modify Resource Pools	Click to add or modify resource pools.
Change Named Resource Pool Assignments	Click to add, delete, or change named resource pool assignments.
Change Generic Resource Pool Assignments	Click to add, delete, or change generic resource pool assignments.
Import Pool Data	Click to enter the appropriate server access information to import the resource pool data and submit the data for import.

Modifying Resource Pools in Batch

Access the Pool Modification sheet (Resource Management, Manage Resource Pools, Mass Pool Changes).

This example illustrates the fields and controls on the Resource Pool Entry.xls file: Pool Modification sheet. You can find definitions for the fields and controls later on this page.

Pool Modification

Specify new pools or changes to existing pools.
For the action of "Add", fill in all the information besides the Pool ID (since that will be system generated).
For the action of "Change", fill in the Pool ID and only the fields that need to change.

Return to home page.

Action	Pool ID	Pool Name	Manager Employee ID	Status	Parent Pool ID	Parent Pool Name	
Add		GSC1	KU0035	Active			Marketing Support
Add		GSC2	KU0023	Active			Financials
Add		GSC3	KU0015	Active			HR
Add		Oracle Sales Pool	KU0042	Active			Sales
Add		Oracle Sales Support	KU0023	Active		Oracle Sales Pool	Sales Support

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Field or Control	Description
Action	Available options are: *Add:* Select to add a resource pool. You must supply the pool name, manager employee ID, and status. The pool ID is generated by the system. *Change:* Select to modify existing pool information. The only required fields are the **Pool ID** and any other fields that you want to modify.
Pool ID	Enter a value only when you are modifying pool information.
Pool Name, Manager Employee ID, and **Status**	Enter values when adding a pool. **Status** can either be *Active* or *Inactive.*
Parent Pool ID and **Parent Pool Name**	Enter values for the parent pool of the pool that you are adding or changing, if applicable. This is used to build the hierarchy of pools in the system. If you do not enter a value and the action is *Add,* the new resource pool is placed at the highest (most outdented) level of the pool hierarchy.

Modifying Named Resource Pool Assignments in Batch

Access the Resource Pool Assignments sheet.

This example illustrates the fields and controls on the Resource Pool Entry.xls file: Resource Pool Assignments sheet. You can find definitions for the fields and controls later on this page.

Resource Pool Assignments

Specify named resource pool assignments.

Return to home page.

Action	Pool Id	Pool Name	Employee ID	Start Date	End Date	Capacity	
Add		GSC2	RS00000013	9/1/2005		100%	Add New Resource
Add		GSC2	RS00000014	9/1/2005	11/24/2005	100%	
Add		GSC3	RS00000015	9/1/2005			Global Services Asia Pac
Change	Pool2		KU0AF	9/1/2005			
Change	Pool1		RS00000017	9/1/2005			
Add		Oracle Sales Pool	RS00000018	9/3/2005		100%	
Add		Oracle Sales Support	KU0057	9/3/2005		75%	Sales Support Pool

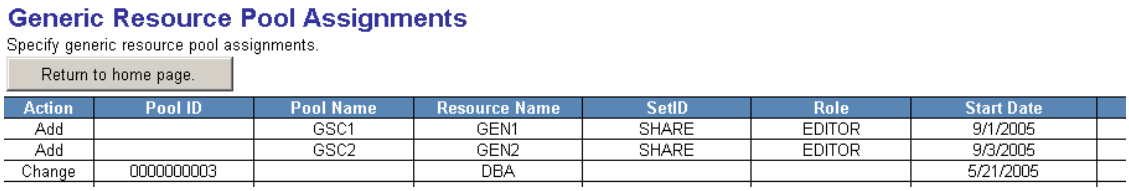
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Field or Control	Description
Action	Available options are: *Add:* Select to add a named resource to the pool. You must enter the employee ID, pool name or pool ID, start date, and capacity. **Note:** If the pool is newly added to the spreadsheet, you will not yet have a pool ID because the ID is system-generated. In this case, you must specify the pool name. When the process encounters a pool name without a pool ID in this spreadsheet, it assumes that you are referring to a newly created pool. If the pool name is not in the current Resource Pool Modification spreadsheet with an action of add, an error occurs, even if the pool name already exists in the system. If the pool that is being affected already exists in the system, you must enter a pool ID. *Delete:* Select to delete a named resource's pool assignment. You must enter the employee ID, start date, and pool ID. *Change:* Select to change an existing resource's assignment. You must enter the pool ID and employee ID. Enter additional data that you want to modify. **Note:** *Delete* and *Change* actions are valid only for existing pools, not for newly created pools that you are adding through the Pool Modification spreadsheet.

Modifying Generic Resource Pool Assignments in Batch

Access the Generic Resource Pool Assignments sheet.

This example illustrates the fields and controls on the Resource Pool Entry.xls file: Generic Resource Pool Assignments sheet. You can find definitions for the fields and controls later on this page.



Generic Resource Pool Assignments

Specify generic resource pool assignments.

Return to home page.

Action	Pool ID	Pool Name	Resource Name	SetID	Role	Start Date
Add		GSC1	GEN1	SHARE	EDITOR	9/1/2005
Add		GSC2	GEN2	SHARE	EDITOR	9/3/2005
Change	0000000003		DBA			5/21/2005

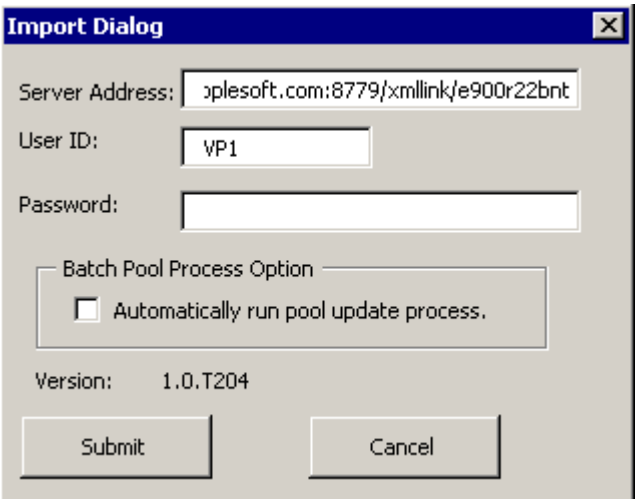
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Field or Control	Description
Action	Available options are: *Add:* Select to add a generic resource to the pool. You must enter the resource name, pool name or pool ID, start date, capacity, SetID, region, and personnel type. *Delete:* Select to delete a generic resource's pool assignment. You must enter the resource name, start date, and pool ID. *Change:* Select to change an existing generic resource's assignment. You must enter the pool ID and resource name. Enter additional data that you want to modify. **Note:** *Delete* and *Change* actions are valid only for existing pools, and not for newly created pools that you are adding through the Pool Modification spreadsheet.

Importing Resource Data

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

This example illustrates the fields and controls on the Import Dialog box. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Server Address	Enter the location of the server on which to load the pool information. Example: http://rt-lnx01.peoplesoft.com:8779/xmllink/e900r22bnt
User ID and **Password**	Enter the ID and password with which to log into the PeopleSoft system.

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Field or Control	Description
Automatically run pool update process	Select to automatically load the pool information directly into the pool transaction tables. If you do not select this option, the data is left in the staging tables. This option gives you the ability to run multiple imports without affecting the pools transactional tables. At a later time, you can run the update process to move the information from the staging table and load it into the pool transaction tables. **Note:** Selecting this option for the import process does not guarantee that the pool information will be updated automatically in the system. Before the information is taken from the staging tables and loaded into the pool tables, the validation process is run on the data to ensure that it does not violate any business rules. If violations occur, the system will not load the data into the transactional tables. At that point, access the Mass Pool Changes page, fix the errors, and then import.

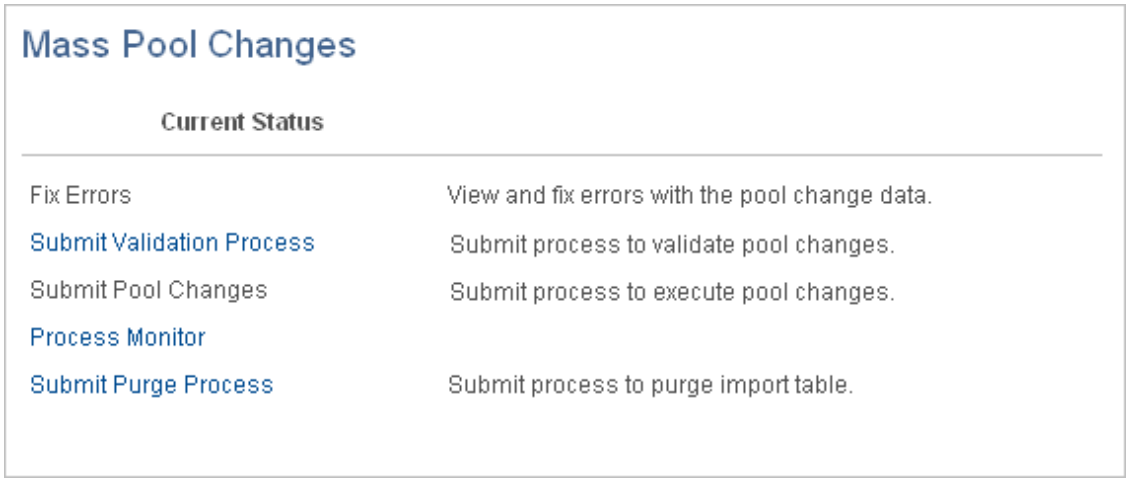
Mass Pool Changes Page

Use the Mass Pool Changes page (RS_MASSPOOL_RUN) to view the status of submitted changes from the Microsoft Excel spreadsheet upload, submit a process to validate pool changes, and submit a process to purge the import table.

Navigation:

Resource Management, and then **Manage Resource Pools**, and then **Mass Pool Changes**

This example illustrates the fields and controls on the Mass Pool Changes page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Current Status	Displays the current status based on the action and the Application Engine process results.
Fix Errors	Click this link to access the Validation Errors page to view and fix pool change data errors. The link is active only if the imported data contains errors. Click **OK** to accept the changes. **Note:** You cannot submit the pool changes until you clear all validation errors.
Submit Validation Process	Click to trigger the Batch Process to Resource Pool Application Engine process (RS_MASSPOOL) to validate the imported data. Click the **Process Monitor** link to review the process status. When the validation process completes: • The **Fix Errors** link is activated if the imported data has errors. • The **Submit Pool Changes** link is activated if the imported data has no errors.
Submit Pool Changes	Click to trigger the Batch Process to Resource Pool process to import the data into the system and update the transactional data with the changes. Click the **Process Monitor** link to review the process status. After submitting the pool changes, you can view the changes on the Manage Pool Resources page.
Process Monitor	Click to access the process monitor to view the status of the Batch Process to Resource Pool process for either pool validation or pool modifications.
Submit Purge Process	Click to trigger the Batch Process to Resource Pool process to purge the import tables in the system. You can not purge data after you submit the pool changes. Click this link when you can not fix the errors on the Validation Errors page and you want to import new data by using the Microsoft Excel file.

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18

Enabling Resource Matching and Cache Processes

Establishing Resource Groups

To establish resource groups, use the Resource Groups component (RS_RESOURCE_GROUPS).

This topic provides an overview of resource groups and discusses how to establish Resource Groups.

The tasks that are discussed in this section are required.

Pages Used to Establish Resource Groups

Page Name	Definition Name	Usage
Resource Group Definition - Resource Groups Page	RS_RESOURCE_GROUPS	Add or modify resource groups and select active resource groups.
Resource Group Definition - Resource Group Details Page	RS_RSRCGRP_ADD	Add or modify resource group details.

Understanding Resource Groups

Resource groups are collections of resources that you define by organizational unit, supervisor ID, or resource pool. You use them to limit a search for resources on the Express Search page and the Staffing Workbench - Fulfill Orders page. In addition, a manager selects the resources to appear on the Staffing Workbench - Manage Utilization page by specifying a resource group.

Users can access only the resource groups that they create.

Related Topics

- Establishing Resource Groups
  To establish resource groups, use the Resource Groups component (RS_RESOURCE_GROUPS).

Resource Group Definition - Resource Groups Page

Use the Resource Group Definition - Resource Groups page (RS_RESOURCE_GROUPS) to add or modify resource groups and select active resource groups.

Navigation:

- **Resource Management**, and then **Define User Options**, and then **Resource Group Setup**, and then **Resource Group Definition - Resource Groups**

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- **Resource Management**, and then **Define User Options**, and then **My Workbench Options**, and then **Workbench**

  Click **Add Resource Groups** on the My Workbench Options - Workbench page.
- **Resource Management**, and then **Express Search**, and then **Express Search**

  Click **Add Resource Groups** on the Express Search page.
- **Resource Management**, and then **Staffing Workbench**, and then **Manage Utilization**

  Click **Add Resource Groups** on the Staffing Workbench - Manage Utilization page.
- **Resource Management**, and then **Staffing Workbench**, and then **Fulfill Orders**

  Click **Add Resource Groups** on the Staffing Workbench - Fulfill Orders page.

This example illustrates the fields and controls on the Resource Group Definition - Resource Groups page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Active	Select the resource groups to appear as options in the **Resource Group ID** field (RS_RSRCGRP_NAME) on the Express Search page, the Staffing Workbench, and the My Workbench Options - Workbench page. The default value is *Active* (check box selected) for new resource groups.
Group ID and **Name**	Displays information about the resource group.
Edit	Click to access the Resource Group Definition - Resource Group Details page to view or edit the group.
Delete	Click to delete the group.
Add	Click to access the Resource Group Definition - Resource Group Details page to add a new resource group.

Resource Group Definition - Resource Group Details Page

Use the Resource Group Definition - Resource Group Details page (RS_RSRCGRP_ADD) to add or modify resource group details.

Navigation:

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

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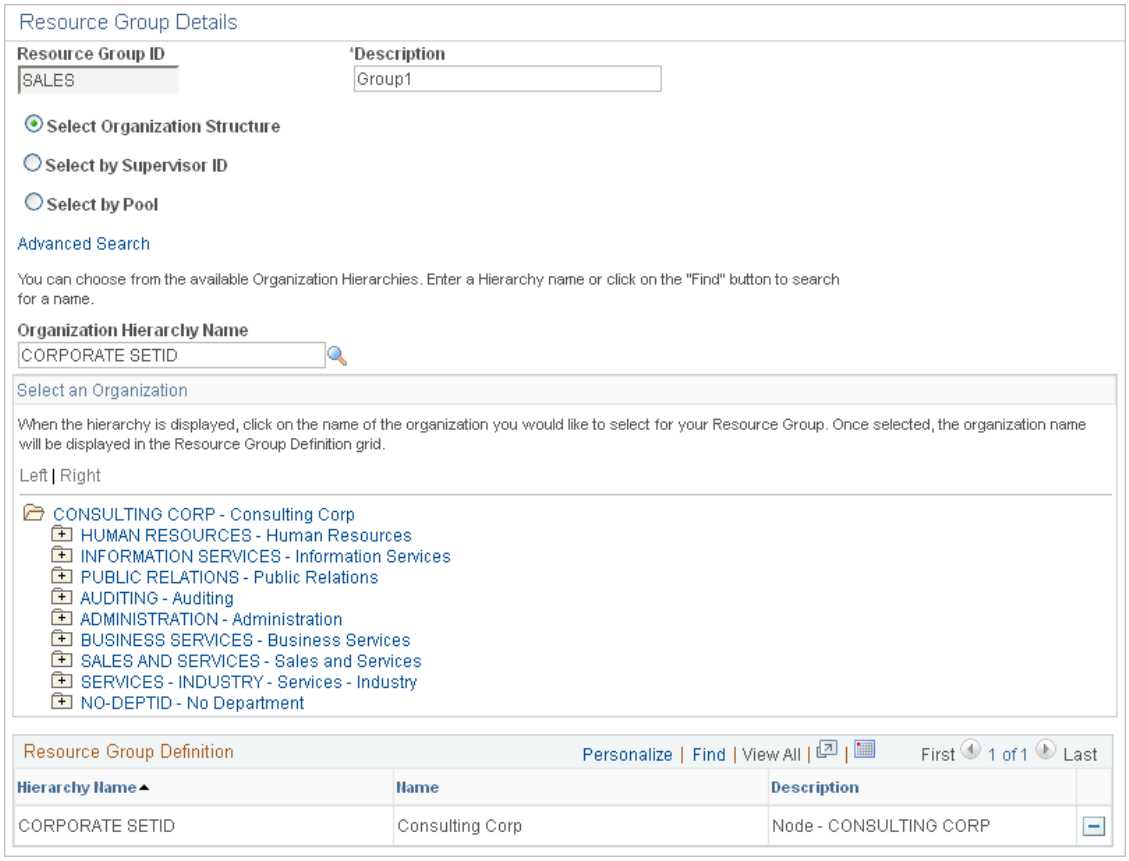
Field or Control	Description
Resource Group ID	Enter a unique group identifier. This is a required field that is not editable after you save the page.
Description	Enter a name that describes the resource group. This is a required field. If you designate the resource group as active on the Resource Group Definition - Resource Groups page, the resource group name is available for selection on the Express Search page, the Staffing Workbench, and the My Workbench Options - Workbench page.
Select Organization Structure	Select to establish a resource group based on organization units.
Select by Pool	Select to establish a resource group based on resource pools.
Select by Supervisor ID	Select to establish a resource group based on supervisor IDs. **Note:** You must enter a supervisor on the Update Employee Data - Employee Job page for all resources before you can use resource groups that are based on a supervisor ID.
Advanced Search or **Basic Search**	Select either method by clicking the respective link to search for organizations to include in the resource group. The **Advanced Search** or **Basic Search** options appear only when you create a resource group based on organization structure.
OK	Click the **OK** button to return to the Resource Group Definition - Resource Groups page. The new resource group appears in the **Available Groups** group box. Click **Save** on the Resource Group Definition - Resource Groups page to save new or modified resource groups.
Cancel	Click to discard the changes and return to the Resource Group Definition - Resource Groups page.

Finding Organizations by Using the Basic Search

Access the Resource Group Definition - Resource Group Details basic search page.

This example illustrates the fields and controls on the Resource Group Definition - Resource Group Details basic search page. You can find definitions for the fields and controls later on this page.

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Use this page to select organizations from the organizational unit tree to associate with the resource group.

Field or Control	Description
Organization Hierarchy Name	Enter the SetID that is associated with the organizational unit tree. Click the lookup button to search for the SetID by description. The search page contains a list of SetIDs that have an organizational unit tree associated with them. The tree enables you to navigate the organization's hierarchy and find the appropriate unit to associate with this group. You can select a tree node such as a group of departments, or a tree detail such as a specific department. When you select the SetID, the organizational unit tree appears in the **Select an Organization** group box.
Select an Organization	Expand the organizational unit tree to view all organizations. Select the desired organization to include in the resource group. You can select any level on the tree to include in the resource group You must select at least one organization for the resource group.

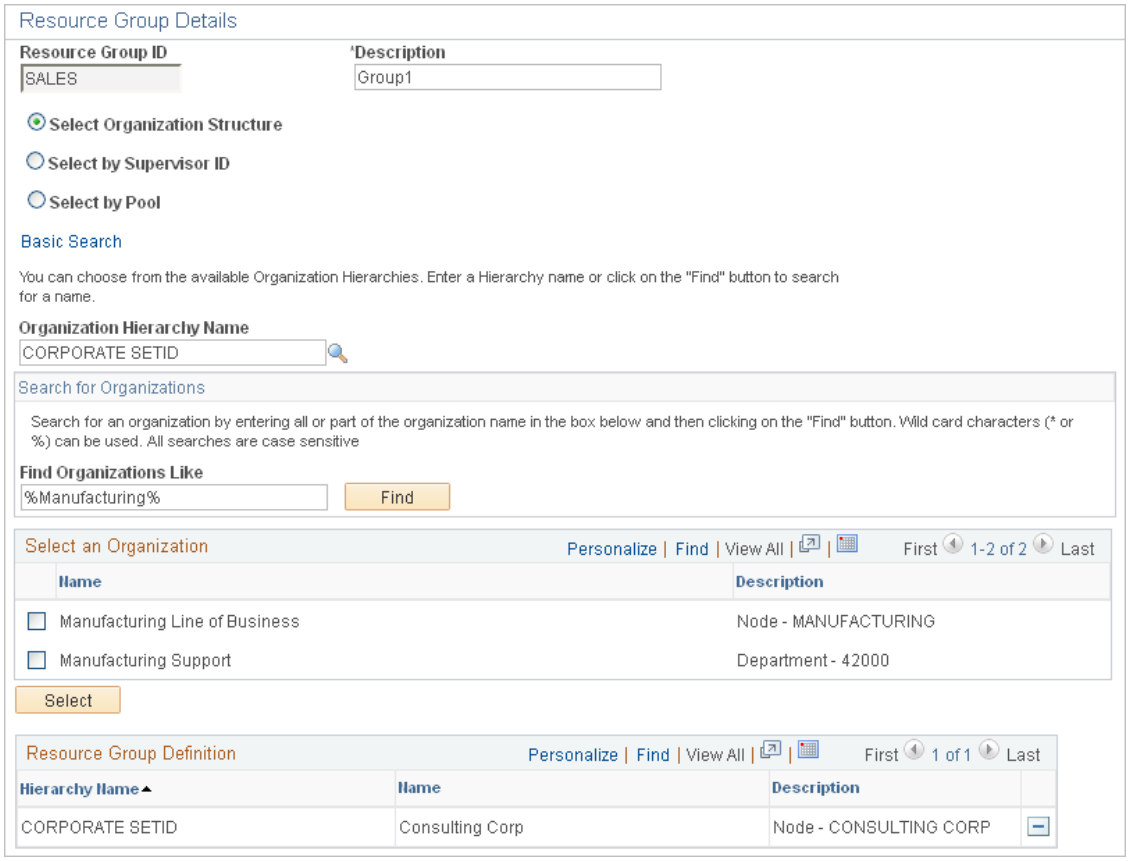
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Field or Control	Description
Resource Group Definition	Displays the SetID name, organization name, and organization description for each selection. Delete rows as needed.

Finding Organizations Using the Advanced Search

Access the Resource Group Definition - Resource Group Details advanced search page.

This example illustrates the fields and controls on the Resource Group Definition - Resource Group Details advanced search page. You can find definitions for the fields and controls later on this page.



Use this page to search for organizations to associate with the resource group.

Field or Control	Description
Organization Hierarchy Name	Enter the SetID that is associated with the organizational unit tree.

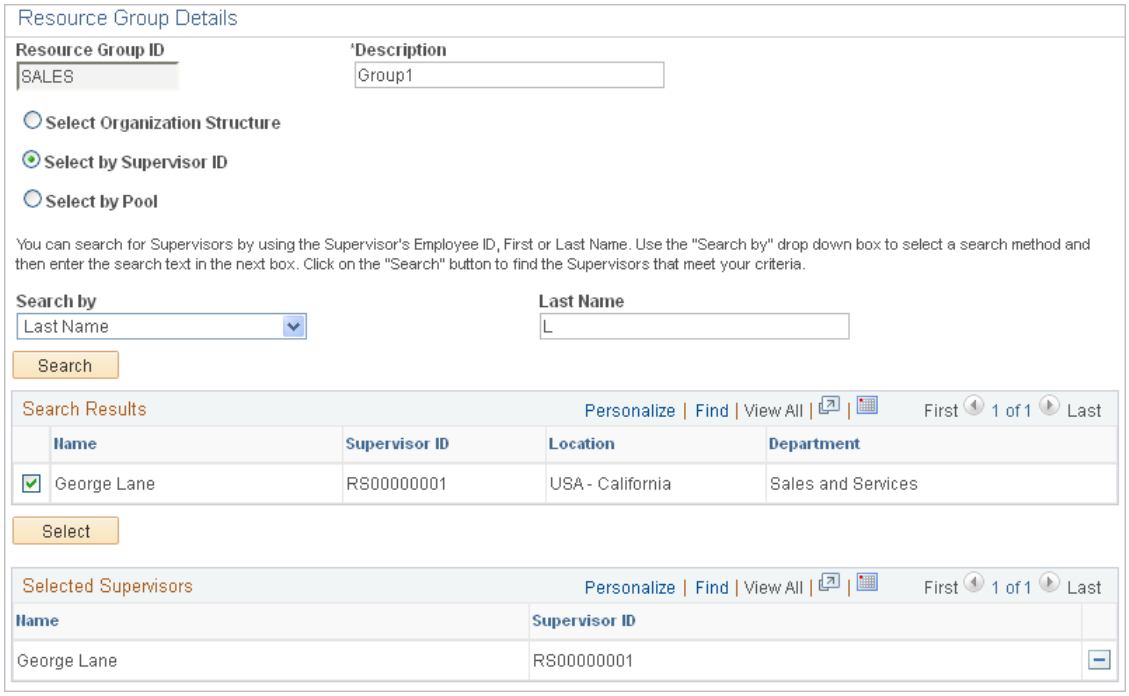
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Field or Control	Description
Find Organizations Like	Enter an organization name, or enter the first characters of the name followed by a wildcard *(* or %)*. To search using characters within the name, enter a wildcard, enter any contiguous characters, and then enter another wildcard. Searches are case-sensitive. **Note:** To view all organizations in the tree, use the Resource Group Definition - Resource Group Details basic search page.
Find	Click this button to perform the search. The list of organizations that match the search criteria appears in the **Select an Organization** grid.
Select	Click this button to add selections to the Selected organization group box.
Select an Organization	Select the check box next to organizations to include in the resource group. You can select tree nodes or tree detail values. You must select at least one organization for the resource group.

Creating Resource Groups by Supervisor ID

Access the Resource Group Definition - Resource Group Details page. Select the **Select by Supervisor ID** option.

This example illustrates the fields and controls on the Select by Supervisor ID view of the Resource Group Definition - Resource Group Details page. You can find definitions for the fields and controls later on this page.



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Use this page to create a resource group based on one or more supervisor IDs.

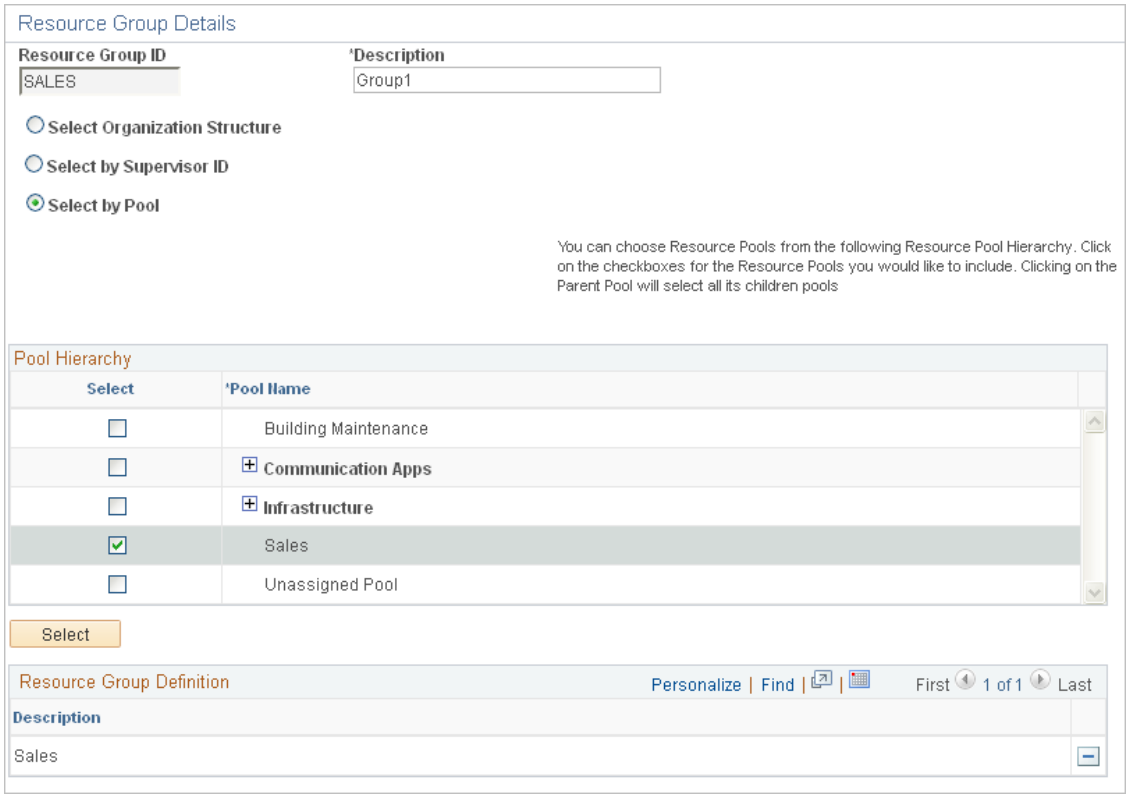
Field or Control	Description
Search by and **Last Name**	Select the search type and enter the supervisor's last name, first name, or employee ID. You can search using the first characters of the name or employee ID. To search using characters within the name or employee ID, enter the wildcard *(%),* enter any contiguous characters, and then enter another wildcard. A supervisor is available for selection if the supervisor's employee ID appears in the Supervisor ID field (SUPERVISOR_ID) on the Employee Job - Update Employee Data page for at least one eligible resource. Searches are not case-sensitive.
Search	Click this button to execute the search. The list of supervisors that match that search criteria appears in the **Search Results** group box.
Search Results	Select the check box next to one or more supervisors.
Select	Click this button to add selections to the **Selected Supervisors** group box. You must select at least one supervisor to establish the resource group.
Selected Supervisors	Displays the supervisor name and ID for each selection.

Creating Resource Groups by Resource Pool

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

This example illustrates the fields and controls on the Select by Pool view of the Resource Group Definition - Resource Group Details page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Pool Name	Select the pools to use to create the resource group from a pool hierarchy showing only active pools. You can select a parent pool or expand the hierarchy and select a specific pool. If you select a parent pool, the system automatically selects all of the pools that belong to the parent pool.
Select	Click this button to add the selected pools to the **Resource Group Definition** group box.

Defining Flexible Attributes

To define flexible attributes, use the Flexible Attributes Setup component (RS_ATTRIB_SETUP).

This topic provides an overview of flexible attributes and discusses how to specify flexible attributes.

> **Note**
>
> The tasks in this section are optional. If you do not use flexible attributes in PeopleSoft Resource Management, you do not need to complete these tasks.

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Page Used to Define Flexible Attributes

Page Name	Definition Name	Usage
Define Flexible Attributes Page	RS_ATTRIB_SETUP	Define flexible attributes.

Understanding Flexible Attributes

You can define and instantly implement a new attribute for resources and resource requests using a flexible attribute. If you modify the attribute, such as changing the valid values, the PeopleSoft Resource Management system immediately implements the changes.

Define Flexible Attributes Page

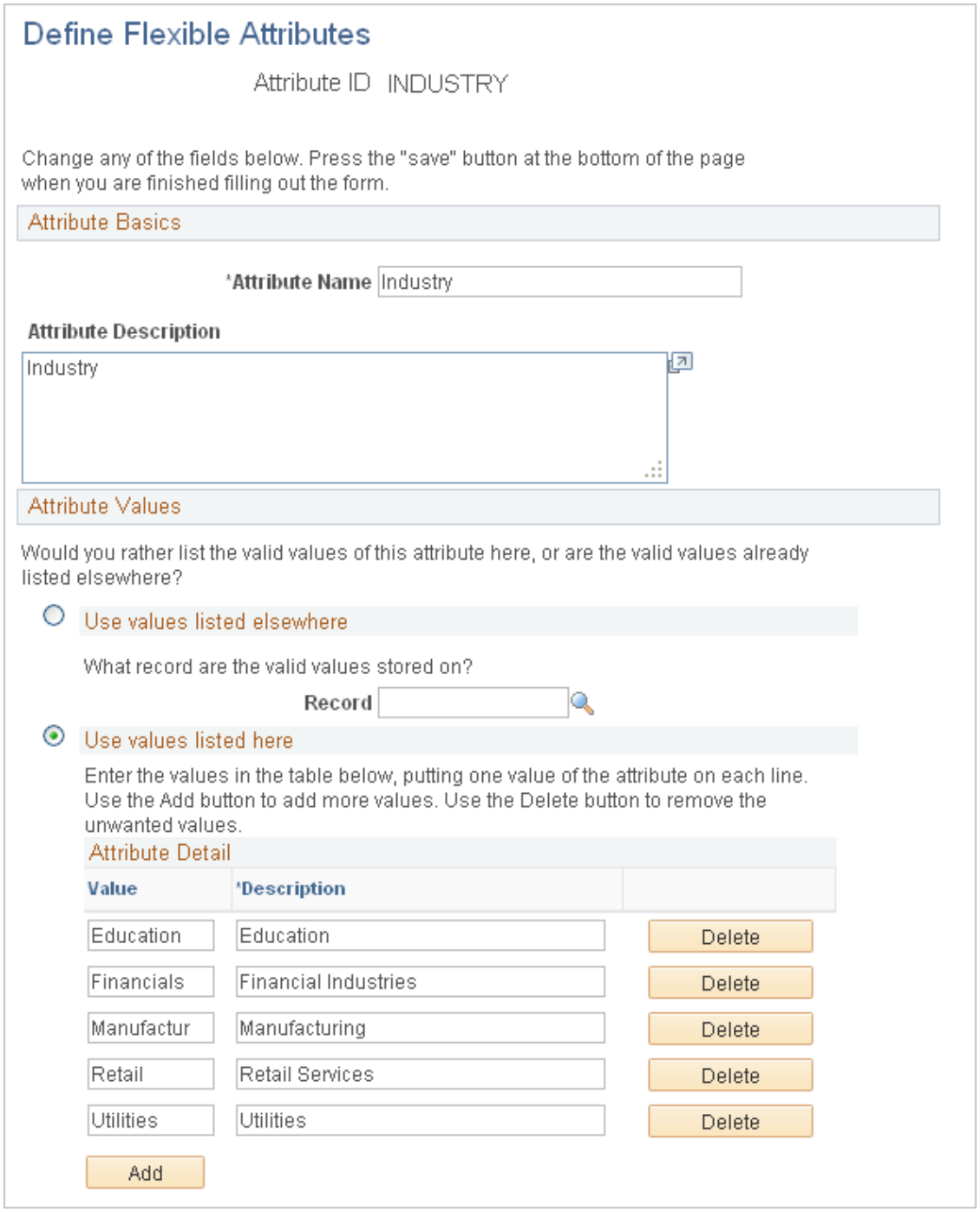
Use the Define Flexible Attributes page (RS_ATTRIB_SETUP) to define flexible attributes.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Resource Management**, and then **Setup RM Flexible Attributes**

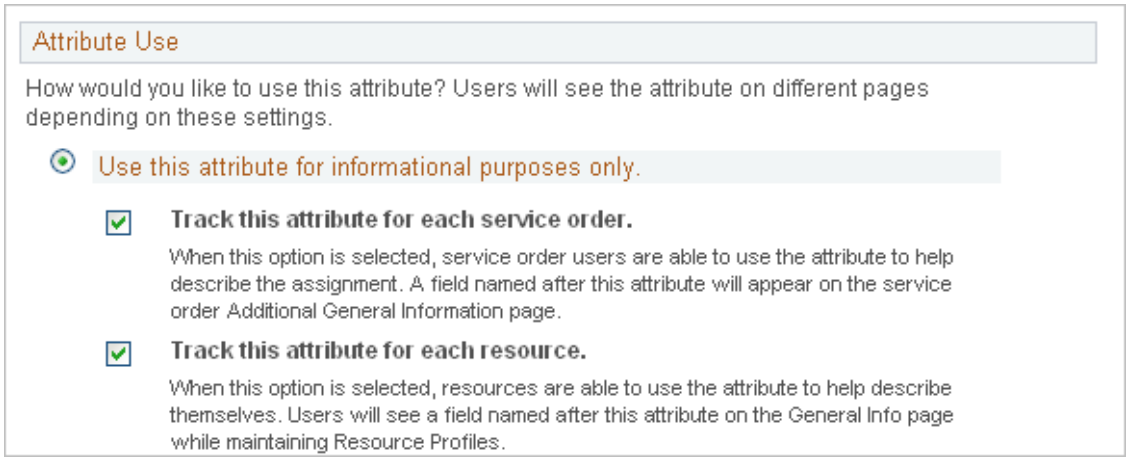
This example illustrates the fields and controls on the Define Flexible Attributes page (1 of 3). You can find definitions for the fields and controls later on this page.

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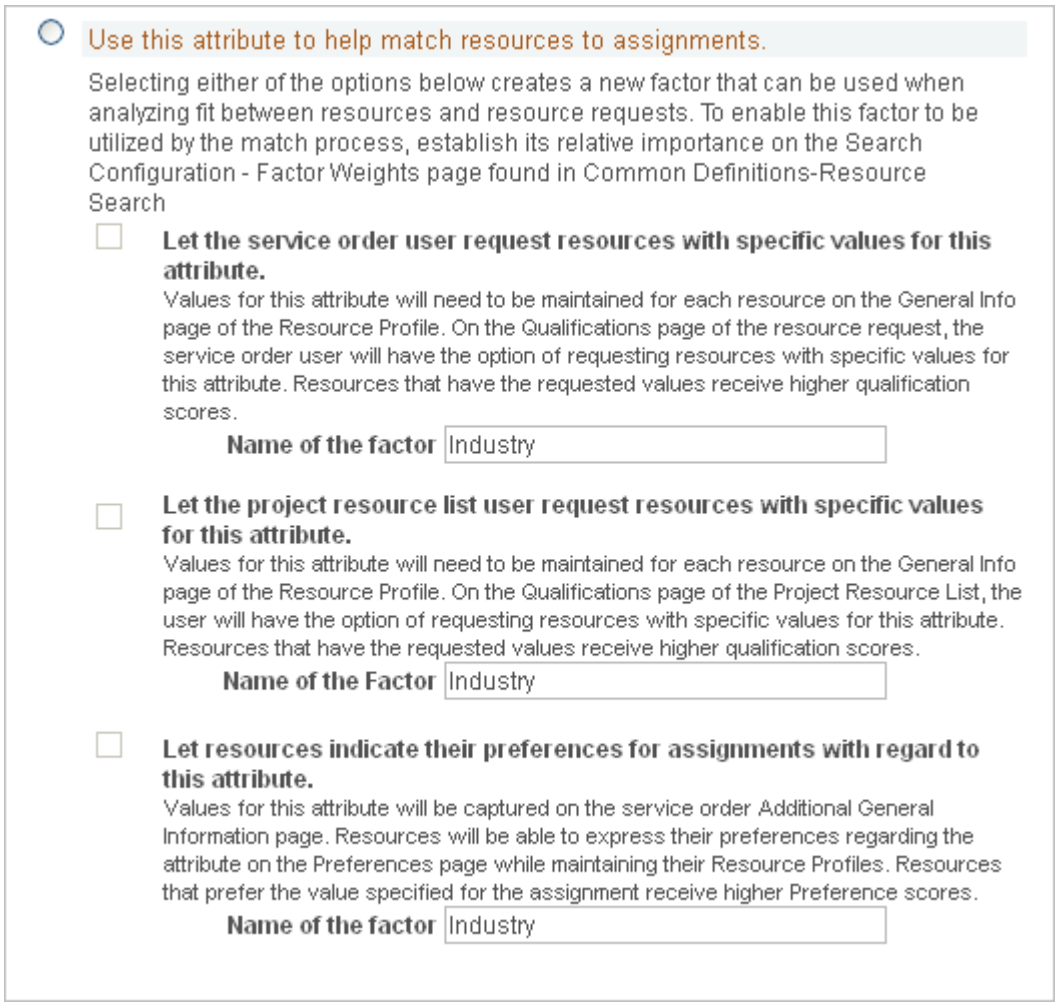


This example illustrates the fields and controls on the Define Flexible Attributes page (2 of 3). You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the Define Flexible Attributes page (3 of 3). You can find definitions for the fields and controls later on this page.



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Attribute Basics

Field or Control	Description
Attribute ID	Enter a unique identifier.
Attribute Name	Enter a name that is recognizable to users when the system prompts them to enter values for the attribute.
Attribute Description	Enter a description that is used for documentation only. The attribute description does not appear elsewhere in PeopleSoft Resource Management.

Attribute Values

In the **Attribute Values** group box, specify the record containing the valid values for an attribute, or define the values on this page.

Field or Control	Description
Use values listed elsewhere	Specify the table from which users select valid values for this attribute if you don't want to list the valid attribute values on this page. The table must be a valid PeopleSoft prompt table and have only one key field.
Use values listed here	Enter the attribute value name and description, and click **Add** to insert additional values. Use a name that is recognizable to users when the system prompts them to select attribute values for a resource or resource request. Select this option if you do not select the **Use values listed elsewhere** option.
Only one value	Select to permit users to specify only a single value of the attribute for resources or resource requests.
Many values	Select to permit users to specify multiple values of the attribute for resources or resource requests. Each flexible attribute can be defined to enable either a single value or multiple values for a resource or resource request. An example of a single-value resource attribute is region. Typically, each resource is assigned to only one region; therefore, you would define the region attribute to allow only one value for each resource. An example of a multiple-value resource attribute is industry specialty. Because a resource may have more than one industry specialty, the industry specialty attribute would allow multiple values for each resource.

Attribute Use

In the **Attribute Use** group box, specify how the attribute is used. Your selection controls where the attribute appears in PeopleSoft Resource Management. Modify the selection as business needs change.

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Field or Control	Description
Use this attribute for informational purposes only	Select if the attribute is for information only and is not used as a factor in the Resource Matching process to determine fit scores.
Track this attribute for each service order	Select to establish a service order attribute. The user specifies values for this attribute on the Service Order - Additional General Information page for the resource request.
Track this attribute for each resource	Select to establish a resource attribute. The resource can specify values for this attribute on the Resource Profile - General Info page.
Use this attribute to help match resources to assignments	Select to establish the attribute as a factor in the Resource Matching process to determine fit scores.
Let the service order user request resources with specific values for this attribute	Select to establish the factor as a Flexible Qualification factor. The attribute is used to: • Specify additional information on resource profiles. The resource can specify values for this attribute on the Resource Profile - General Info page. • Specify additional qualifications on resource requests. The resource request user can specify values for this attribute on the Qualifications tab of the Resource Requests page. • Create a new match factor used by the Resource Matching process to determine fit scores. The resource's fit score associated with this factor is included in the Qualifications factor family fit score. Enter the name of the factor—either the name that is established for the attribute or a different name—to appear on the Search Configuration - Factor Weights page, if the search type selected is *RSFSR* (Express Search/ Fulfill Orders) or *RSRSR* (Job Spy and Manage Utilization). **Note:** Users can select as many values as they need for a flexible qualification factor on a resource request. For multiple-value attributes, users indicate if each value is desired or required. For single-value attributes, users indicate an importance weighting of *Desirable* or *Very* desirable for each value. Users can also indicate that only resources with one of the requested single-value attributes will be considered.

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Field or Control	Description
Let the project resource list user request resources with specific values for this attribute	Select to enable users to specify a value for this attribute on the Update Generic Resource Qualifications page in PeopleSoft Program Management. If you select this option and specify a value for this flexible attribute on the Update Generic Resource Qualifications page, the system sends the value to the Qualifications tab of the: • Express Search page. • Generic Resource Request page. • Resource Requests page for requests that you create from the Manage Generic Resources page in PeopleSoft Program Management. This option appears only if you use PeopleSoft Program Management.
Let resources indicate their preferences for assignments with regard to this attribute	Select to establish this factor as a Flexible Preference factor. The attribute is used to: • Specify preferences on a resource profile. Resources can specify values for the attribute on the Resource Profile - Preferences page and rate their preference from *0–Very undesirable* to *4–Very desirable.* • Specify additional information on a resource request. The resource request user can specify values for the attribute on the Service Order - Additional General Information page. • Create a new match factor to include in Resource Matching calculations of factor fit scores. Resource Matching analyzes how well resource request attribute values match resource preferences. A resource's fit score that is associated with this factor is included in the Preferences factor family score for the resource request. Enter the **Name of the factor**—either the name that is established for the attribute or a different name—to appear on the Factor Weights page, if the search type selected is *RSFSR* or *RSRSR.*

Important

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

See Application Fundamentals: Defining Resource Management Installation Options.

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Setting Up and Maintaining the Search Framework and Resource Matching Cache Tables

This topic provides overviews of cache administration processes, Resource Matching work tables, the Search Framework, and search index automatic update processes.

Pages Used to Set Up and Maintain the Search Framework and Resource Matching Cache Tables

Page Name	Definition Name	Usage
Search Framework Settings Page	RS_SEARCH_CONFIG	Configure parameters for the Search Framework.
Factor Weights Page	RS_SRCH_FACT_WGHT	Define the relative importance of each factor within its family.
Cache Administration - Miscellaneous Page	RS_CACHE_MISC	Specify processes to refresh cache tables and create search indexes.
Cache Administration - Maintain Search Index Page	RS_SRCH_INDEX	Capture the parameters needed to create the search indexes.
Cache Administration - Summary Page	RS_CACHE_SUMMARY	Confirm the list of processes that you want to run or schedule for the future.
Search Index Agent Manager Page	FO_AGENT_MGR	View, start, and stop agent processes.

Understanding Cache Administration Processes

The Cache Administration Application Engine program (RS_CACHE_AD) manages the execution of cache and maintenance processes that are required periodically in PeopleSoft Resource Management. The cache processes update cache tables that are used by various PeopleSoft Resource Management activities such as fulfilling service orders, managing resource utilization, and capacity planning. The maintenance processes purge unnecessary data from the system such as obsolete resource schedules.

You can select processes and—using PeopleSoft Process Scheduler—run them immediately or schedule them to run at intervals during a time when system usage is low. You can run processes individually or they can be logically run in batch, such as by required interval.

Cache administration does not include processes that are typically required only at implementation (such as a process to load holidays) or as part of a normal business process (such as a process to create resources in batch).

Understanding Resource Matching Work Tables

Resource Matching uses temporary work tables when calculating availability factor fit scores and retrieving search results. To maintain optimal system performance you must routinely clear the tables of unnecessary data as part of your database maintenance procedure.

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Understanding the Search Index

Search Framework is used to search structured and unstructured data. Search Framework quickly calculates qualifications and preferences fit scores for each resource. PeopleSoft uses the Search Framework for these purposes:

- Resource Matching uses Search Framework to determine a resource's fit for a resource request for the all the factors except the Availability factor.
- The Express Search features uses the Search Framework to determine which resources meet the specified qualifications and keywords criteria and calculate a fit score.

The Search Framework is separate from the database. The indexing process is a snapshot of the database at one point in time and does not remain synchronized with the data stored in the database unless you routinely update the index. The system logs changes to resource requests and resource profiles in the Resource Management Log table (RS_SRCH_LOG). When the Create Search Index Application Engine program (RS_SRCH_INDX) runs, it updates the search index with the changes in the Resource Management Log table. Alternatively, you can create a new search index with current database information.

Use the Search Framework searching capabilities that are delivered with PeopleSoft Financials. If you do not use the Search Framework searching capabilities, PeopleSoft Resource Management cannot calculate fit scores for resources, find the best resources for resource requests, find the best requests to fit resources.

How PeopleSoft Resource Management Creates the Search Index

The PeopleSoft product delivers a standard searching template for these search types. However, PeopleSoft Resource Management customers must define their own search criteria for their organization as part of the implementation process. To optimize searching capabilities and performance, the system extracts data from PeopleSoft Resource Management records via PS Query and places the data into an XML file. The XML file is sent to the Search Framework server for indexing.

The system can also extract information from electronic attachments such as resource resumes. However, the creation of search indexes may be slower when electronic documents are processed. To optimize performance when resume searches are needed, PeopleSoft Resource Management provides a field in the Applicant and Employee components into which users can paste resume ASCII text. Using this method (instead of electronic attachments) reduces search index creation time. Even if users paste their resumes this way, they can still attach electronic resumes to the applicant and employee records to present them to customers.

The Search Index Creation process (PTSF_GENFEED) captures search definitions and generates the appropriate index files (XML). The system applies a key to the templates according to a Key field (SRCH_TYPE_CD). This key is used to identify the correct index files for the Search Framework.

When configuring the search types, you need to define the following attributes:

- The availability algorithm to be used
- Factor weights
- The list of configurable fields and settings used in the search type

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> **Note**
>
> You can define factor weights as part of the search configuration and factor family weights in the actual search pages.

Reverse Searching

Job Spy and Manage Utilization is a reverse search. Reverse searching consists of searching orders, customers, and contacts that would be a good match for a particular resource.

Forward Searching

Express Search and Fulfill Orders are forward search. Forward searches consist of searching resources that meet certain criteria, such as required job order and desired qualifications. Forward searches calculate both the resource qualification and preference scores. These searches can also provide resource availability information.

The choice of availability algorithm is defined in the search type configuration. For an availability algorithm to be used with a search type, the resource calendar must be current.

For additional information about PeopleSoft Search, *see PeopleSoft Application Fundamentals*, PeopleSoft Search for Financial and Supply Chain Management

Distance Searches

To enable the Distance Search feature, a developer must populate the geocode table to map each postal code to its latitude and longitude.

Developer Guidelines:

1. Locate files containing postal codes, cities, states, latitude, and longitude for the countries to which your organization operates and download them. Many web sites offer these files for free or a small fee. You can also subscribe to a geocoder web service and create your own geocoded files. The key is to create a file containing postal code, city, state, country, latitude, and longitude in a CSV (spreadsheet) format.
2. Modify the file layout and AE process to populate the geocode table
    a. Modify the file layout RS_GEOCODE_CITY in Application Designer to match the layout and location of the file created in step one.
    b. Open the RS_GEOCODE AE process in Application Designer
    c. Change the input file name and path to match the file downloaded from the internet
    d. Run the process to read the input file and insert the data into the RS_GEOCODE_CITY table.

Normally this only needs to run one time because city locations don’t normally change. It may be necessary to download and import a new file when new cities or postal codes are added to the geocode databases. The RS_GEOCODE_CITY table serves as input to the Search Framework index building processes as well as the location prompt tables.

Prerequisites

To use the Search Framework, you must:

- Establish and maintain the search index by running the Cache Administration program to create or update an index of competencies, accomplishments, work experience, and default resume-attachment information for each eligible resource.

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There are two types of searches you establish: forward, which is used for Express Search, Staffing Workbench - Fulfill Orders, and Pool Manager Workbench; and reverse, which is used for Staffing Workbench - Manage Utilization and Job Spy.

- Configure the Application server and Process Scheduler.
- Install and configure the Search Framework. Configure the Search Framework to connect to the Search server.

Search Index Automatic Update Processes

PeopleSoft Resource Management provides two Application Engine processes that work together to monitor data changes and automatically trigger the Create Search Index program to update the search index:

- The Search Index Agent Application Engine process (FO_SRC_AGENT), known as the agent process.
- The Automatic Agent Monitoring Application Engine process (FO_AGENT_DMN), known as the daemon process.

> **Note**
>
> This section discusses one option for maintaining the search index. Alternatively, you can use the Maintain Search Index page to create or update the index, independent of the Search Index Agent and Automatic Agent Monitoring processes.

The Agent Process

Agent processes monitor data changes and determine the best time to trigger the Create Search Index program to update the search index. You enable agents for PeopleSoft Resource Management search types (RSFSR and RSRSR) on the Search Settings page. The system creates one agent for each search type that you enable on the Search Settings page.

The Search Index Agent process has no run control page. The agent creates a run control ID for the Create Search Index program when it triggers the process. The run control ID is a concatenation of the search type code and language code. If this run control ID already exists when the agent starts, the system deletes the existing run control and creates a new one by using the same run control ID and the updated run control options. The agent uses the same process instance ID as the Create Search Index program that it triggers. If the Create Search Index program fails, the agent process also fails.

Administrators use the Search Index Agent Manager page to view the status of agent processes, and start and stop agent processes. Agent processes can be in a status of:

- Running (RUN)
- Starting (STAR)
- Stopping (STOP)
- Stopped (END)
- Time Out (TOUT)

The Daemon Process

The daemon process monitors the status of the agents, and cancels and reschedules any inactive processes. An inactive agent process is one that does not have an end status but has

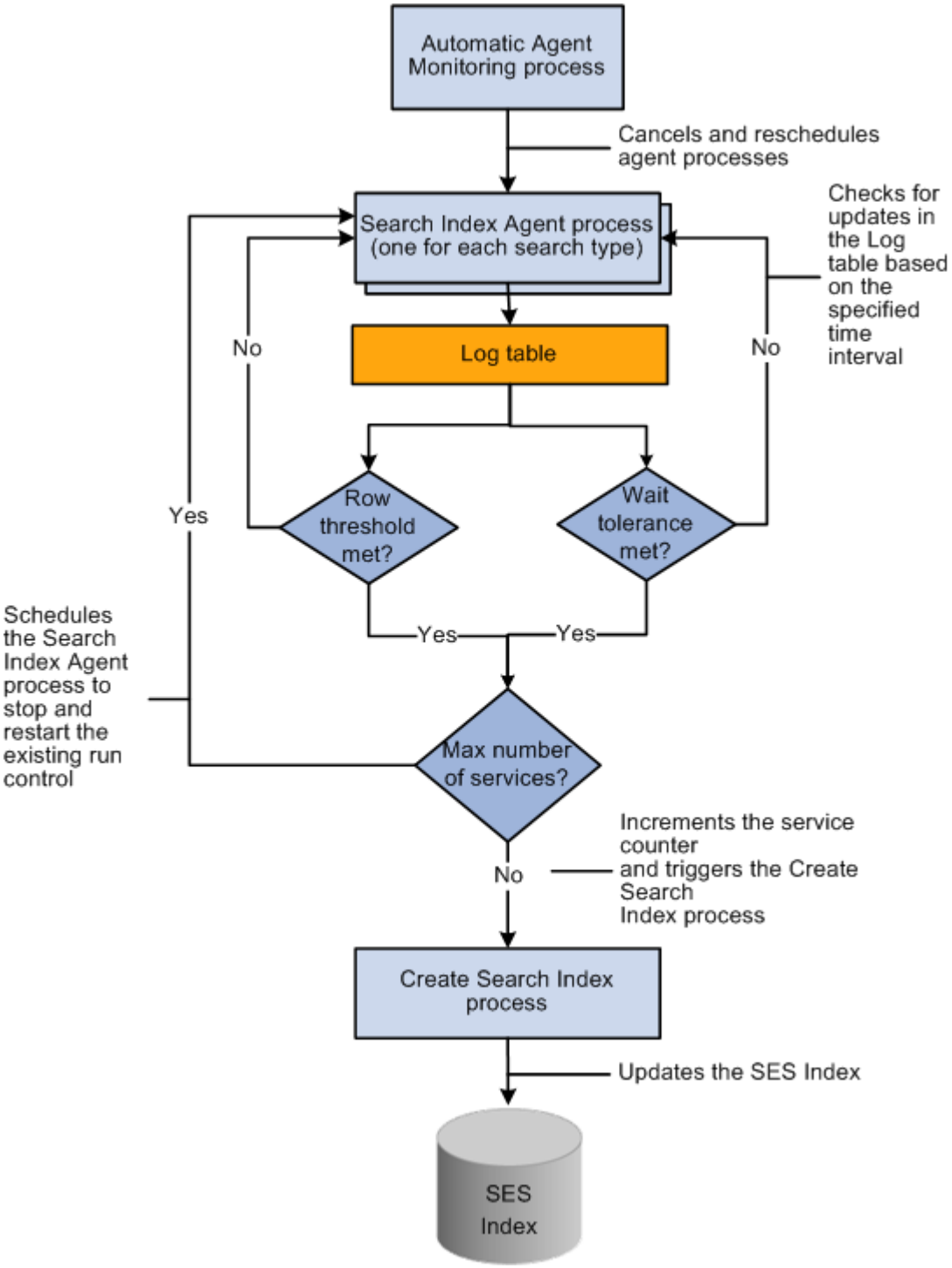
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shown no activity for a period of two sleep intervals plus two minutes. The sleep interval is defined in seconds in the Sleep Interval (secs) field on the Search Settings page.

Process Flow

This diagram shows the relationship between the Automatic Agent Monitoring, Search Index Agent, and Create Search Index processes:

This diagram shows the relationship between the Automatic Agent Monitoring, Search Index Agent, and Create Search Index processes:



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Prerequisites

To use the search index automatic update processes, administrators must:

- Configure the Process Scheduler to run enough process types and processes simultaneously to cover the needs of all server agents and any other Application Engine processing requirements.
- Set up the daemon group in PeopleTools and associate the group to the appropriate Process Scheduler definition.

> **Note**
>
> Oracle recommends that you configure the Automatic Agent Monitoring process on the same Process Scheduler as the Search Index Agent process and Create Search Index program. This prevents the Automatic Agent Monitoring process from trying to trigger the Search Index Agent process if the Process Scheduler is down.

See *PeopleTools : PeopleSoft Process Scheduler,* "Setting Server Definitions," Defining Daemon Groups.

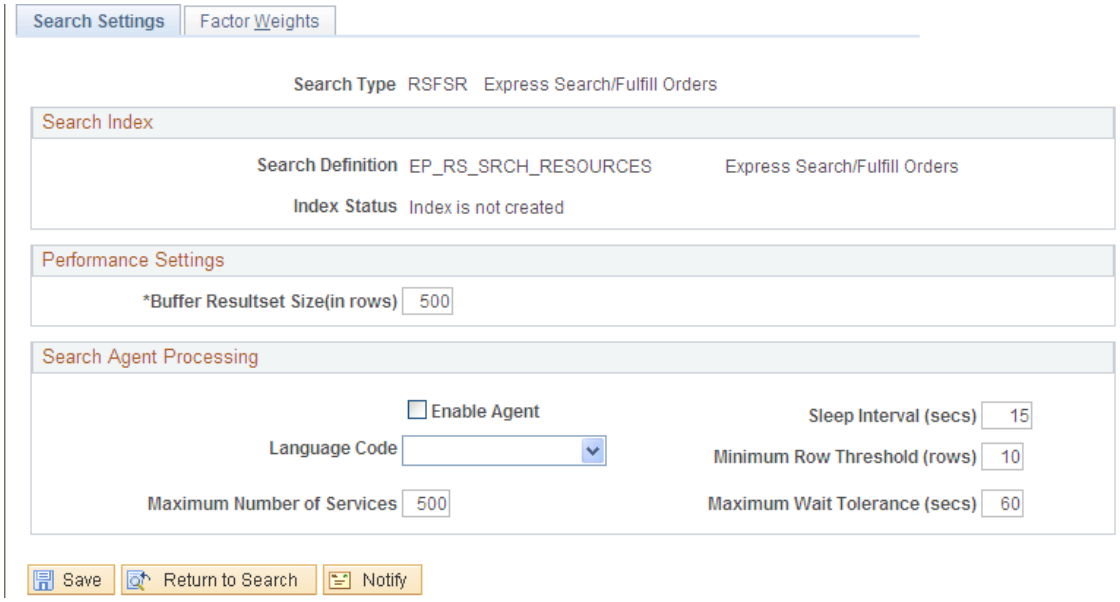
Search Framework Settings Page

Use the Search Settings page (RS_SEARCH_CONFIG) to configure parameters for the Search Framework.

Navigation:

Set Up Financials/Supply Chain, and then **Common Definitions**, and then **Resource Search**, and then **Search Configuration**, and then **Search Settings**

This example illustrates the fields and controls on the Search Setting Page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Search Type	Displays the type of search that you selected on the Search Configuration search page: • **RSFSR** (Express Search/Fulfill Orders) This search type is also used for Pool Manager Workbench searches. • **RSRSR** (Job Spy and Manage Utilization)

Performance Settings

Field or Control	Description
Buffer Resultset Size (in rows)	Enter a value that determines the size of the result set. The buffer result set size determines the number of documents that Search Framework will fetch during each search. This result set may differ from the actual result set shown on the page. The primary reason for this is because the availability calculation occurs after the search is complete, and this calculation occurs only for the items that Search Framework returns. Therefore, if you specify a large buffer result set size, you have less of a possibility of missing an item in the result set that is more available than other items in the result set that appear on the page. The disadvantage of increasing the buffer result set size is that the system will calculate availability on more items, which can adversely affect system performance. PeopleSoft Resource Management delivers default values of *500* for the forward search and *300* for the reverse search. You determine the correct balance between accuracy and performance based on the needs of your organization.

> **Note**
>
> You must also set the Maximum Number of Results in the Oracle Search Framework Administration Console. It should be larger than the maximum search result set desired on the search pages and greater than the largest Buffer Result set Size in the Search Configuration component.

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Search Agent Processing

Field or Control	Description
Enable Agent	Select to enable the Search Index Agent process for this search type. When you select this option, a row appears on the Search Agent Index Manager page that enables you to stop and start the agent. The default value is deselected. You enable a separate agent for each search type.

The remaining fields in the group box are required if you select the Enable Agent option.

Field or Control	Description
Sleep Interval (secs)	Enter the frequency with which the Search Index Agent process checks for updates in the Resource Management Log table (RS_SRCH_LOG).
Language Code	*All Languages:* Select for the Create Search Index program to update all installed languages on each run. This option appears only if you installed multiple languages. Select a specific language for the Create Search Index program to update only one language. Only installed languages are available for selection. **Note:** If you installed multiple languages and only select one language in this field for the Create Search Index program to update, the search data for all other languages will be outdated in the system until the next time that you create the full index. This is because the Resource Management Log table is cleared of all previous changes each time the Create Search Index program runs.
Minimum Row Threshold (rows)	Enter the minimum number of rows needed to trigger the Create Search Index program.
Maximum Number of Services	Enter the maximum number of times that the agent will cycle through the sleep interval before rescheduling itself and then shutting itself down. The agent increments a counter (SVC_COUNTER) by one every time that it completes an interval. When the counter is equal to the value that you specify in this field, the agent schedules itself to start again, and then ends the current process.
Maximum Wait Tolerance (secs)	Enter the maximum amount of time that a row of data waits before it is updated in the Search Framework collection by the Create Search Index program.

All of the fields in the **Search Agent Processing** group box are disabled when the agent is in a status of Running, Stopping, or Starting. If the agent fails or is canceled, the fields remain disabled until an administrator accesses the Search Index Agent Manager page to change the

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run status to Time Out. The fields in this group box are available when the run status is Time Out

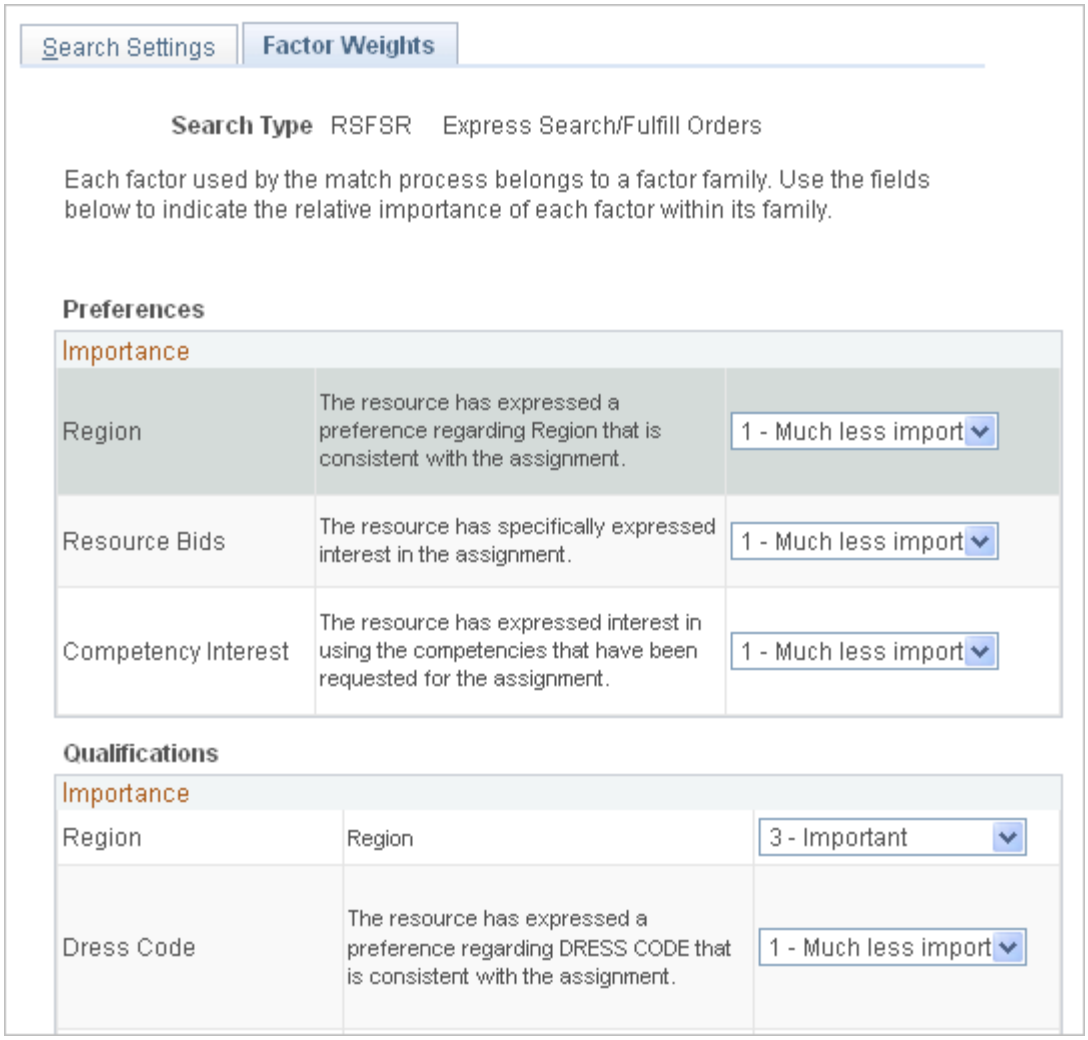
Factor Weights Page

Use the Factor Weights page (RS_SRCH_FACT_WGHT) to define the relative importance of each factor within its family.

Navigation:

Set Up Financials/Supply Chain, and then **Common Definitions**, and then **Resource Search**, and then **Search Configuration**, and then **Factor Weights**

This example illustrates the fields and controls on the Factor Weights page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Preferences and **Qualifications**	Enter the relative importance of each individual factor in the Resource Matching calculation of the Preference and Qualifications factor family fit scores. Available values are: *0 - Not at all important* *1 - Much less important* *2 - Less important* *3 - Important* *4 - More important* *5 - Much more important*

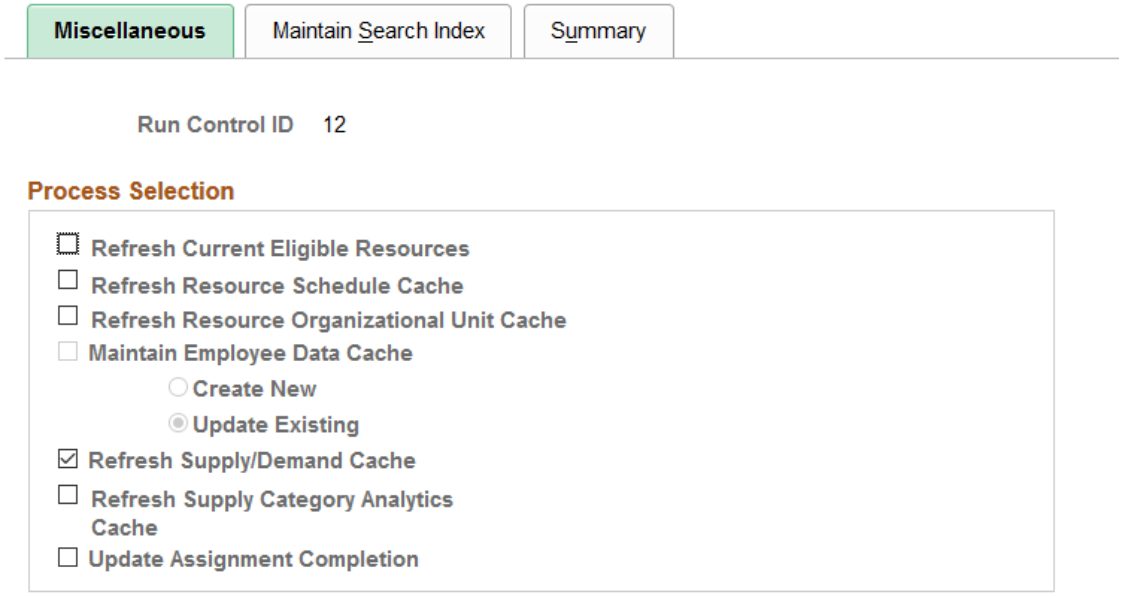
Cache Administration - Miscellaneous Page

Use the Cache Administration - Miscellaneous page (RS_CACHE_MISC) to specify processes to refresh cache tables

Navigation:

Set Up Financials/Supply Chain, and then **Common Definitions**, and then **Resource Search**, and then **Cache Administration**, and then **Miscellaneous**

This example illustrates the fields and controls on the Cache Administration — Miscellaneous Page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Refresh Resource Organizational Unit Cache	Select to update the Resource Organizational Unit Cache table (RS_WORKER_ORG) that stores organization information from the specified organization tree. The program is required when: • Implementation occurs. • Resources are created individually using the Establish Employee As Resource component (RS_WRKR_CREATE). • Resources are created in batch by using the Create Resources process. • A node or detail value changes on the organization tree. • A new organization tree is implemented. • A resource's organization unit value changes, such as the resource's department. Run this program nightly.
Update Assignment Calendar	This check box is available only if the **Synchronous Calendar Update** check box is not selected in the Resource Management Installation page. Select this option to invoke the calendar update process (RS_APPTUPD). This creates or updates the calendar entries for all the assignments in Assigned, Pending Approval and Reserved status for which the calendar entries were not created or updated.
Refresh Resource Schedule Cache	Select to update the Resource Schedule Cache table (RS_DF_WRKR_DATE) that is used to track a resource's schedule. The program purges old availability date and ineligible resource data. This program runs automatically for a resource when the resource's schedule changes. Run the program manually for all resources as required. It is required when: • Implementation occurs. • Standard hours change on the Update Employee page. • New holidays are added to the holiday schedule and loaded by using the Holiday Load Application Engine process (RS_HOLIDAY). **Note:** There is an effect on resource calendars and availability if you change the **Do not schedule assignments on Holidays** installation option. After you change this option, you must run these two processes in this order: Holiday Load process and Cache Administration - Refresh Resource Schedule Cache.

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Field or Control	Description
Refresh Current Eligible Resources	Select to update the Eligible Resource Cache table (RS_ELGBL_WRKR) with current eligible resource information. In addition to tracking the current, eligible resources, the table stores the resource's job-related information such as job code, location, and bill rate. The program is required when: • Routine changes are made to a resource's job-related information. • Resources are created in batch by using the Create Resources Application Engine process (RS_CW). Run this program nightly and as required.
Maintain Employee Data Cache	This field does not apply to PeopleSoft Resource Management.
Refresh Supply/Demand Cache	Select to update the cache tables for both supply and demand. The system triggers a message to update the Supply Cache table (RS_SUP_CACH) when you establish employees as resources and add them to resource pools in PeopleSoft Resource Management, and when resources are removed or inactivated. You must update the Demand Cache table (RS_DMD_CACH) when new generic resource requests are created and when new resource assignments are created in PeopleSoft Program Management. **Note:** Application messages automatically update the resource supply and project demand information in near real time. The application messages are delivered inactive. You must activate the message to update the cache tables at run time. The messages are RS_DMD_CACHE_SYNC and RS_SUP_CACH_SYNC.
Refresh Supply Category Analytics Cache	Select to update the RS_POOLRES_DATE and RS_GENRES_TMP cache tables for supply category analytics for all resources.
Update Assignment Completion	Select to automatically complete or cancel all resource assignments with an end date prior to the date the process is run. The system will also add the processed assignments to the resource history list. **Note:** All resource assignments with an Active status will be set to Complete. All resource assignments with a status of Interview, Propose, Reserve or Pending Approval will be set to Cancel.
Save	Click to save the run control, or select **Miscellaneous,** or **Summary** to access other Cache Administration pages.

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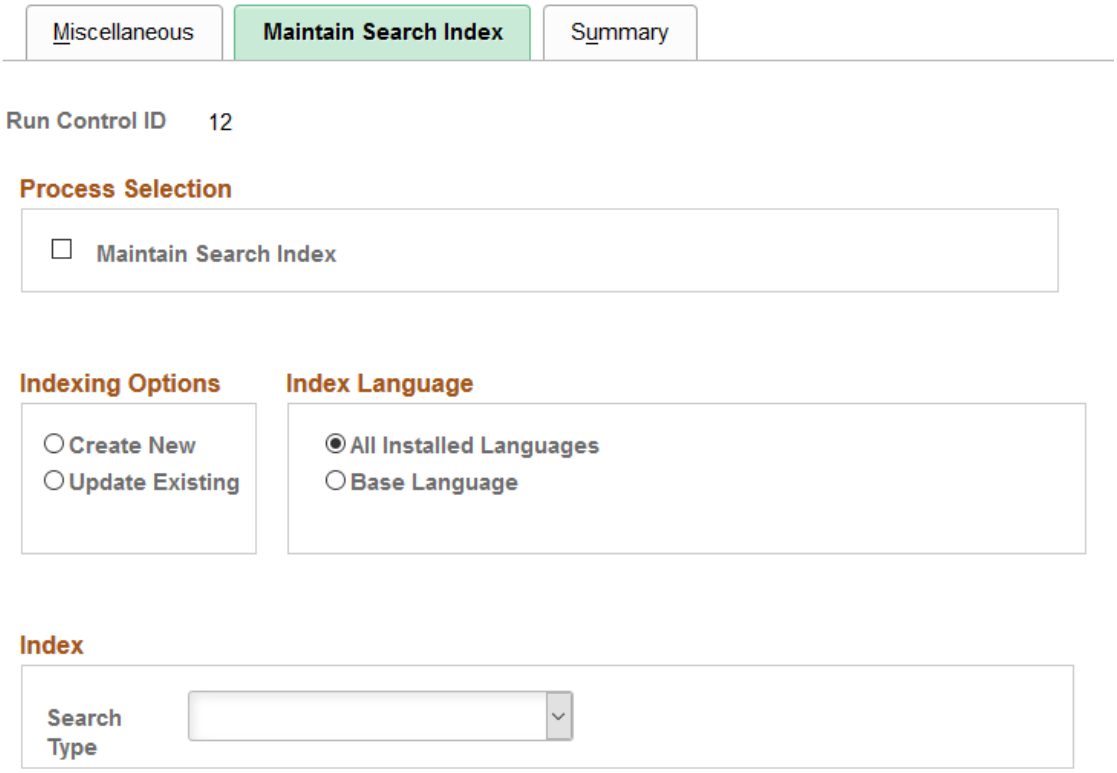
Cache Administration - Maintain Search Index Page

Use the Cache Administration - Maintain Search Index page (RS_SRCH_INDEX) to capture the parameters needed to create the search index files.

Navigation:

Set Up Financials/Supply Chain, and then **Common Definitions**, and then **Resource Search**, and then **Cache Administration**, and then **Maintain Search Index**

This example illustrates the fields and controls on the Cache Administration - Maintain Search Index page . You can find definitions for the fields and controls later on this page.



Process Selection

Field or Control	Description
Maintain Search Index	Select to create, update the search index as part of this Cache Administration run control.

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> **Note**
>
> Optimize Indexes feature has been removed from the Maintain Search Index page. It is now maintained centrally within the Search Framework. See the product documentation for *PeopleTools: Search Technology*Administering PeopleSoft Search Framework, Administering Search Definitions and Search Categories.

Indexing Options

Field or Control	Description
Create New	Select this option and run the process as often as you want to refresh the search index with current database information. This option deletes the existing index and creates a new one. Use this option to routinely replace the search index.
Update Existing	Select to update the existing index without deleting it by inserting new documents and updating documents that changed since the last time the update process ran.

> **Note**
>
> This page provides one option for scheduling search index updates. Alternatively, you can enable the Search Index Agent process to monitor data changes and automatically trigger the Create Search Index program to update the search index.

Index Language

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

Field or Control	Description
All Installed Languages	Select to create a collection for each installed language.
Base Language	Select to specify just the base language **Note:** If you installed multiple languages and only select base language for the Create Search Index program to update, the search data for all other languages will be outdated in the system until the next time that you create the full index. This is because the Resource Management Log table is cleared of all previous changes each time the Create Search Index program runs.

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Index

Field or Control	Description
Search Type	Enter a search type of *Express Search/Fulfill Orders* or *Job Spy and Manage Utilization* to create an index for searches in PeopleSoft Resource Management. **Note:** Before you can run the Cache Administration process you must first deploy the search definition corresponding to the search type selected. Use the Deploy Search Definition page to deploy the search definition to the Search server. The search definition must be deployed before building the index for the first time. Navigation - PeopleTools, Search Framework, Administration, Deploy/Delete Object.
Save	Click **Save** to save the run control, or select **Miscellaneous,** or **Summary** to access other Cache Administration pages.

The length of time it takes to update the index depends on the number of active resources and language translations that are processed.

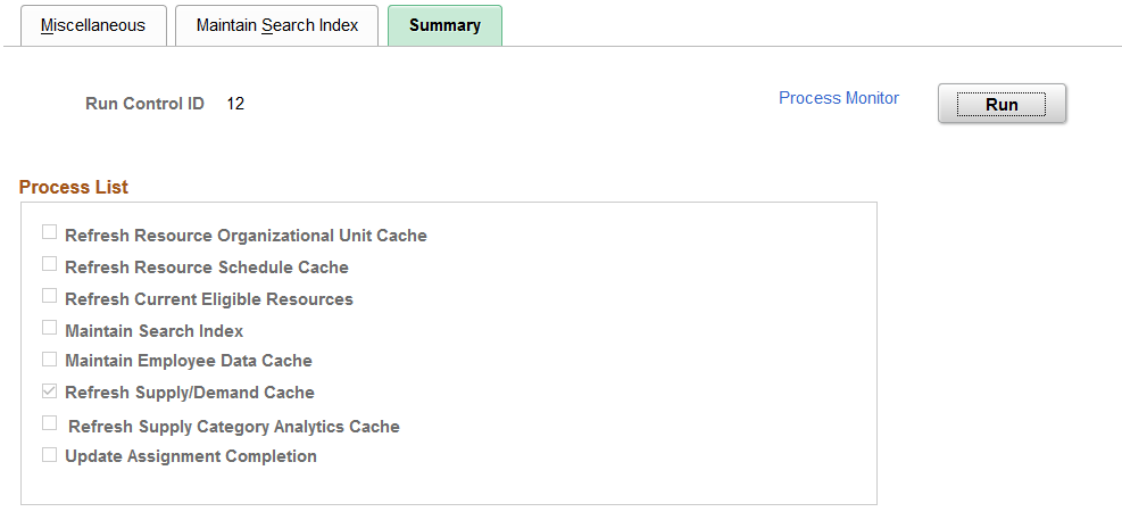
Cache Administration - Summary Page

Use the Cache Administration - Summary page (RS_CACHE_SUMMARY) to confirm the list of processes that you want to run or schedule for the future.

Navigation:

Set Up Financials/Supply Chain, and then **Common Definitions**, and then **Resource Search**, and then **Cache Administration**, and then **Summary**

This example illustrates the fields and controls on the Cache Administration – Summary page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Run	Click to save the run control and proceed to the Process Scheduler Request page to run the program or schedule it to run later.
Save	Click to save the run control but not run the program.
Process Monitor	Click to review the status of the process scheduler job.

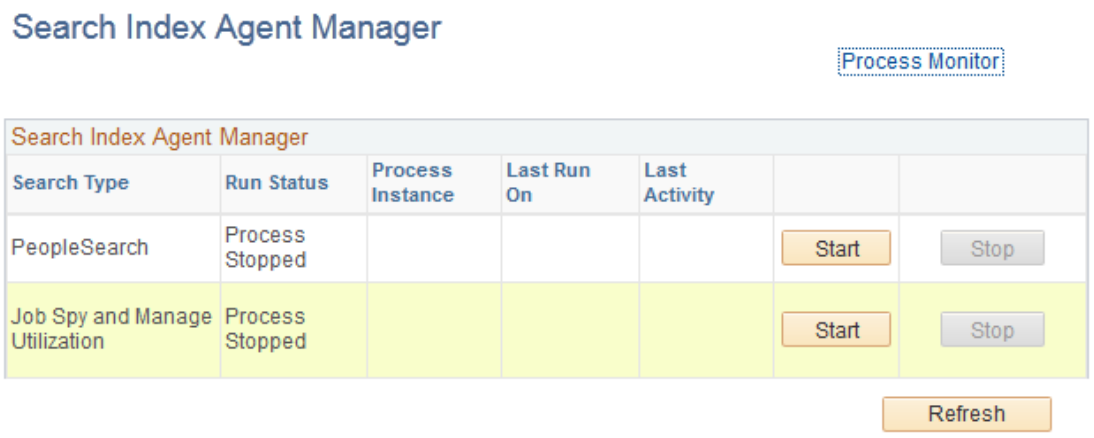
Search Index Agent Manager Page

Use the Search Index Agent Manager page (FO_AGENT_MGR) to view, start, and stop agent processes.

Navigation:

Setup Financials/Supply Chain, and then **Common Definitions**, and then **Resource Search**, and then **Search Index Agent Manager**

This example illustrates the fields and controls on the Search Index Agent Manager page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Run Status	Displays the agent run status of Error, Running, Starting, Stopping, Stopped, or Time Out.
Process Instance	Displays the process instance ID of the running agent process. This same process instance ID is used by the Create Search Index program that is invoked by the agent. When you click the **Start** button to start the agent, and the previous run status is Time Out, the agent cancels the previous process instance ID and assigns a new one.
Last Run On	Displays the last time that the agent triggered the Create Search Index program.

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Field or Control	Description
Last Activity	Displays the last time that the agent checked the Resource Management Log table to determine if any action was necessary.
Start	Click to start the agent and create a new process instance ID if the previous run status was Time Out.
Stop	Click to stop the agent. This button is disabled if the run status is Stop or Time Out.
Refresh	Click to trigger the Search Index Agent process to: • Refresh the data on the page. • Determine the amount of time since the last activity. If the agent's run status is Run, Start, or Stop, and the last activity is earlier than 120 seconds plus a sleep interval (as defined on the Search Framework Settings page), the agent's run status changes to Time Out.

Warning

Do not manually change the run control record for the Create Search Index program while the Search Index Agent process is running. Doing so will result in inconsistent search data because the Create Index Agent process will update different data than is specified for the agent.

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19

Maintaining Resource Profiles

Understanding Resource Profile Maintenance

The resource profile captures an inventory of a resource's qualifications and preferences to calculate the resource's fit scores. The profile also provides general employee data, such as contact information, weekly work days, or assignment restrictions.

The foundation for a resource's profile is the employee or non-employee data (such as employee ID, name and contact information, and qualifications) that is stored in the employee source database. Information about the resource, such as flexible resource attribute values and work experience, is also maintained in the resource profile.

This section lists a prerequisite and discusses:

- Use of resource profiles.
- Resource profile design.

Prerequisite

You must establish employees and non-employees as resources in PeopleSoft Resource Management before you can work with their resource profiles.

See Understanding Resources.

Use of Resource Profiles

Resource profile maintenance is typically the responsibility of the resource manager and the resource. The unique security specifications for each PeopleSoft user role determine whether a user can modify only the user's own profile or view and modify other resource profiles. You can control the list of roles with permission to modify resource profiles.

This table lists the folder navigation paths that access the resource profile:

Navigation	Description
Resource Management, Maintain Resource Profiles, My Profile	Used by resources to view and modify their own profile information.
Resource Management, Maintain Resource Profiles, Profiles	Used by resource managers or other users with appropriate access to view and modify a resource's profile.
Resource Management, Maintain Resource Profiles, Review Profiles	Used by staffing coordinators or other users with appropriate access to review a resource's profile.

The appearance of the Resource Profile component depends on the navigation path that you choose and the resource profile display options that are established in the **Profile Display Options** group box on the Installation Options - Resource Management page during implementation. The resource profile that appears when you view your own profile is the profile

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that is associated with your user login. To access profile information for other resources, you can select the profile by looking up the resource's name or employee ID.

Resource Profile Design

Personal data and qualification information is maintained in the employee source database. If you integrate with Human Capital Management (PeopleSoft HCM) and you select a link to update qualification information that is stored in the employee source database, you access the appropriate PeopleSoft HCM pages by using the Single Signon feature. The information in PeopleSoft Resource Management data tables is updated in near real time.

If the Financials database is the employee source database, then the qualification records can be modified in the resource profile pages that are discussed in this topic. You can modify other information in the resource profile that is maintained specifically for PeopleSoft Resource Management if your user ID is associated with a role that has the appropriate security access.

Qualifications in PeopleSoft HCM

If PeopleSoft HCM is the source database for the competencies, interests and other qualifications in a resource profile, then you can update and save qualification data in the Person Profile component (JPM_PERSON_PROFILE) in the PeopleSoft HCM system and return to the resource profile in PeopleSoft Resource Management. An application message sends the data from PeopleSoft HCM to the Financials database.

When a user selects an update link from the resource profile, if the resource has more than one profile type in PeopleSoft HCM Profile Management, then the Select Profile Type page opens in HCM. You must select the *Person* profile type to integrate the PeopleSoft Resource Management profile with the PeopleSoft HCM profile. The Profile Details page opens so that you can modify the qualification details in PeopleSoft HCM.

When managers update other types of user profiles, they access the Person Profile component (JPM_PERSON_PROFILE) in PeopleSoft HCM.

See *PeopleSoft HCM 9.2 documentation: Manage Profiles,* "Managing Profiles," Maintaining Profiles.

During PeopleSoft Resource Management implementation on the Resource Setup - Common Installation Options page, you determine the competency evaluation type that appears in the resource profile and is used by Resource Matching. Available evaluation types, such as *Self, Supervisor,* and *Mentor,* are based on the translate values in the Evaluation Type field (EVALUATION_TYPE) properties. The default value is *Self.* The resource profile shows only the latest competency evaluation.

For the competency information in PeopleSoft HCM to update the resource profile in PeopleSoft Resource Management, the evaluation type in PeopleSoft HCM must match the evaluation type that is selected during Resource Management implementation. If the evaluation type that the PeopleSoft Resource Management system uses is different than the evaluation type in PeopleSoft HCM, the competency information that appears in the resource profile may not match the competency information in the resource evaluation in PeopleSoft HCM. For example, if you use the *Supervisor* evaluation type in PeopleSoft Resource Management and you use the *Self* evaluation type in PeopleSoft HCM, then changes to the self evaluation in HCM are not reflected in the resource profile.

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> **Note**
>
> The PeopleSoft HCM profile can store many different evaluation types. If you modify the evaluation types that are available for selection in PeopleSoft HCM, also modify the evaluation types in PeopleSoft Resource Management to keep the two databases synchronized.

See *PeopleSoft HCM 9.2 documentation: Manage Profiles,* "Setting Up Profile Management," Defining Instance Qualifiers.

See *PeopleTools documentation: System and Server Administration,* "Using PeopleTools Utilities," Using Administration Utilities, Translate Values.

Qualifications in PeopleSoft Resource Management

If the Financials database is the employee source database, select the **Add/Update** link for the **Competencies and Interests** region of a resource profile to access the appropriate pages for updating this information in the Financials database.

If competency change notification workflow is enabled in the Resource Setup - Common Installation Options page, then the system sends an email notification to the resource manager who is defined in the Job record (JOB) when qualifications are modified in the resource profile. This workflow applies only if you use the Financials database as the employee source database for the resource.

Employee Source Database Tables

This table contains the categories of information in the resource profile and the tables that store the source data.

If you use PeopleSoft HCM as the employee source database, application messages send resource profile data from the HCM database to the corresponding table in the Financials database. Corresponding table names in the two databases may not be identical.

Resource Profile Category	Employee Source Database Tables
Objective: A brief description summarizing the resource's work objectives and background.	Objective information is stored in the Objective field (WORKER_SUMMARY) in the Resource Management Worker Table record (RS_WORKER_TBL). Objective information is stored only in the Financials database.

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Resource Profile Category	Employee Source Database Tables
Areas of specialty: The competencies or competency categories that are a resource's strengths or areas of expertise.	Specialty values are stored in these database tables: • Resources' specialties are stored only in the Financials database in the Worker Specialties record (RS_WRKR_SPECS). • Valid competency values are stored in the Competencies Table record (COMPETENCY_TBL) in the Financials database or in the Content Items record (JPM_CAT_ITEMS) in the HCM database. • Competency types are stored in the Competency Types record (RS_TYPE_TBL) in the Financials database or in the Content Group Type record (JPM_CAT_GROUPS) in the HCM database.
Work experience: Any type of work that the resource has performed. It is updated automatically each time a resource receives a new assignment. It can also be updated manually. This category includes resumé attachments.	Work experience information is stored only in the Financials database in the Worker Table record (RS_WORK_HISTORY). Resumé document attachments are stored on the File Transfer Protocol file server. Information about the attachments, such as employee ID, description, and default resumé flag, are stored only in the Financials database in the Resource Management Attachments record (RS_ATTACHMENTS).

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Resource Profile Category	Employee Source Database Tables
Qualifications: A resource's competencies and accomplishments.	Competencies and interests are stored in these database tables: • Resources' competencies are stored in the Person Competencies record (COMPETENCIES) in the Financials database or in the Profile Items record (JPM_JP_ITEMS) in the HCM database. • Valid competency values are stored in the Competencies Table record (COMPETENCY_TBL) in the Financials database or in the Content Items record in the HCM database. • Resource evaluation types are stored in the Person Competency Evaluation record (RS_EVALUATIONS) in the Financials database or in the Profile Items record in the HCM database. • Review rating values are stored in the Review Ratings record (REVW_RATING_TBL) in the Financials database and the HCM database. • Rating model values are stored in the Rating Model record (RATING_MDL_TBL) in the Financials database and the HCM database. • If you use Financials as the employee source database, competency types are stored in the Competency Types record (RS_TYPE_TBL). If you use PeopleSoft HCM as the employee source database, PeopleSoft Resource Management displays competency information from the Worker Competencies View record (RS_WRKR_COMP_VW). This view is restricted to show only the latest evaluations of competencies. The evaluation type that appears, such as *Self*, *Peer*, or *Supervisor*, is specified on the Resource Setup - Common Installation Options page. **Important:** Do not include a rating for the same competency in more than one evaluation with the same effective date. For example, if you rate the Expertise competency in one self-evaluation, do not include the Expertise competency for a different self-evaluation for the same resource with the same effective date.

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Resource Profile Category	Employee Source Database Tables
	Values for education, licenses and certificates, language, professional memberships, honors and awards, and tests are stored in these database tables: • Resources' qualifications are stored in the Person Accomplishments record (ACCOMPLISHMENTS) in the Financials database or in the Profile Items record in the HCM database. • Valid qualification values are stored in the Accomplishments Table record (ACCOMP_TBL) in the Financials database or in the Content Items record in the HCM database.
Preferences: A resource's individual preferences for assignments; can include flexible attributes that are defined by the organization.	Preferences are stored only in these Financials database fields and tables: • Maximum travel distance is stored in the Distance field (DISTANCE) in the Worker Table record (RS_WORKER_TBL). • Resources' preference attribute IDs and value IDs are stored in the Flexible Worker Preferences record (RS_WRKR_PREFS). • Resources' attribute preferences are stored in the Attributes record (RS_ATTRIBUTES). • Valid values for each resource preference attribute are stored in the Attribute Values record (RS_ATTRIB_VALS).

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Resource Profile Category	Employee Source Database Tables
General information: A resource's address, phone numbers, job information, passports and visas, weekly work days, home airport, assignment restrictions, and other resource attribute values.	Address and job information are stored in these database tables: • If you use the Financials database as the employee source database: – Resource names, addresses, and personnel status are stored in the Personal Data record (PERSONAL_DATA). – Name and address effective dating information is stored in the Effective Dated Personal Data record (PERS_DATA_EFFDT). • If you use PeopleSoft HCM as the employee source database: – Personnel status is stored in the Person Record record (PERSON) and sent to the Personal Data record in the Financials database. – Personnel status effective dating information is stored in the Effective Dated Personal Data record (PERS_DATA_EFFDT). – Resource names are stored in the Person Names record (NAMES) and sent to the Personal Data record and the Effective Dated Personal Data record in the Financials database. – Addresses are stored in the Addresses record (ADDRESSES) and sent to the Personal Data record and the Effective Dated Personal Data record in the Financials database. • Job information is stored in the Job record in the Financials database and the HCM database. • Email addresses are stored in the User Email record (PSUSEREMAIL). **Note:** General information that is stored in PeopleSoft HCM must be maintained in PeopleSoft HCM. These values cannot be updated directly in the resource profile. Passport and visa information are stored in these database tables: • Passport information is stored in the Passport record (CITIZEN_PSSPRT) in the Financials database and the HCM database. • Visa information is stored in the Visa Data record (VISA_PMT_DATA) in the Financials database and the HCM database. Phone information that is used by PeopleSoft Resource Management is stored only in the Financials database in the Worker Phone record (RS_WRKR_PHONE).

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Resource Profile Category	Employee Source Database Tables
	Weekly work days that are used by PeopleSoft Resource Management, home airport, and assignment restrictions are stored only in the Financials database in the Worker Table record (RS_WORKER_TBL). Resource qualifications can include flexible attributes defined by the organization. Flexible resource qualification information is stored only in the Financials database. This list describes the source data for each flexible resource qualification field: • The resource's qualification attribute ID and value ID are stored in the Financials database in the Attribute ID and Value ID record (RS_WRKR_AT_VAL). • Valid values for each flexible resource qualification attribute are stored in the Financials database in the Attribute Values record (RS_ATTRIB_VALS). • The flexible qualification attributes are stored in the Financials database in the Attributes record (RS_ATTRIBUTES).
Resource profile (summary): A single, display-only page.	The sections that appear are selected on the Installation Options - Resource Management page during implementation.
Supply categories (Additional Resource Information):	Additional resource information is stored only in the Financials database. • Project role and region are stored in RS_WORKER_TBL. • RS_WRKR_POOL_VW is used to get the resource pool information.

Maintaining Resource Profiles

The resource profile is a dynamic record designed for periodic review and update by the resource and resource manager to reflect changes in the resource's qualifications. You view or modify various parts of a resource's profile when you establish and maintain the resource.

This topic discusses how to maintain resource profiles.

Pages Used to Maintain Resource Profiles

Page Name	Definition Name	Usage
Profiles - Overview Page	RS_ERES_OVERVW	View or modify a resource's objectives, areas of specialty, and additional resource information.
Profiles - Work Experience Page	RS_ERES_WORK_HIST	View a resource's work experience information.

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Page Name	Definition Name	Usage
Work Experience (edit) Page	RS_WORK_HIST_EDIT	Add or modify a resource's work experience entries. Profiles - Work Experience Page
Profiles - Qualifications Page	RS_ERES_COMP_ACOMP	View or modify a resource's qualifications that are stored in the employee source database.
Profiles - Preferences Page	RS_ERES_PREFS	View or modify resource preference information.
Profiles - General Info Page	RS_ERES_GEN_INFO	View or modify a resource's contact information, job, passports and visas, weekly work days, home airport, assignment restrictions, and flexible resource attribute values.
Profiles - Secure Data 1 Page	RS_SEC_DATA 1	Enables you to secure or unsecure data tabs based on the preference selected in the Installation options. Maintain Resource Profile Page
Profiles - Secure Data 2 Page	RS_SEC_DATA 2	Enables you to secure or unsecure data tabs based on the preference selected in the Installation options. Maintain Resource Profile Page
Profiles - Resource Profile Page	RS_RES_PROF_RVW	Review consolidated resource profile information in a resumé format.
<Resource> Contact Information Page	RS_RES_PROF_CONTCT	Review a resource's address and telephone information. Profiles - Resource Profile Page

Maintain Resource Profile Page

Use the Profiles – Secure Data 1 page (RS_SEC_DATA 1) to enable you to secure or unsecure data tabs based on the preference selected in the Installation options.

Navigation:

- **Resource Management**, and then **Maintain Resource Profiles**, and then **Maintain Resource Profile**
- Click Secure Data 1 on any Resource Profile page.

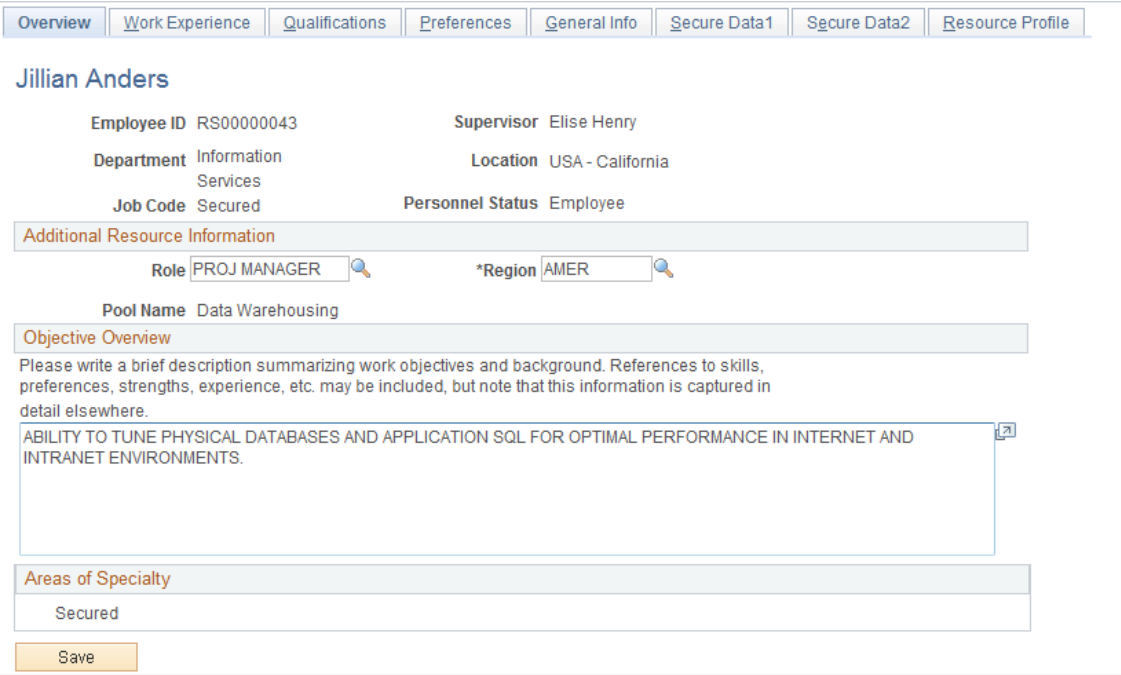
Use the Profiles - Secure Data 2 page (RS_SEC_DATA 2) to enable you to secure or unsecure data tabs based on the preference selected in the Installation options.

Navigation:

- **Resource Management**, and then **Maintain Resource Profiles**, and then **Maintain Resource Profile**
- Click Secure Data 2 on any Resource Profile page.

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This example illustrates the fields and controls on the Profiles – Secure Data 1 and Secure Data 2 pages. You can find definitions for the fields and controls later on this page.



If a user has security access to a secure data tab, only that tab will be visible on the Maintain Resource Profile, Profile page. If they do not have access to any of the secure data tabs, then the tabs will not be visible on this page.

> **Note**
>
> If a field is placed on either secure data tab in the setup options, it is considered as a secure field. The position and headers/titles of these secure fields on their original tabs will remain the same. However, the actual data is replaced with the word SECURED. If a field is not placed on a secure data tab, then it will be visible throughout the tabs in their current place in the resource profile.

The information defined in the Resource Profile page is based on the secure profile data options set by the administrator. For example, if a particular field, such as job code, was selected as secured by the administrator, then you will not be able to view the job code. Instead, the text SECURED will appear for the particular field.

Profiles - Overview Page

Use the Profiles - Overview page (RS_ERES_OVERVW) to view or modify a resource's objectives, areas of specialty, and additional resource information.

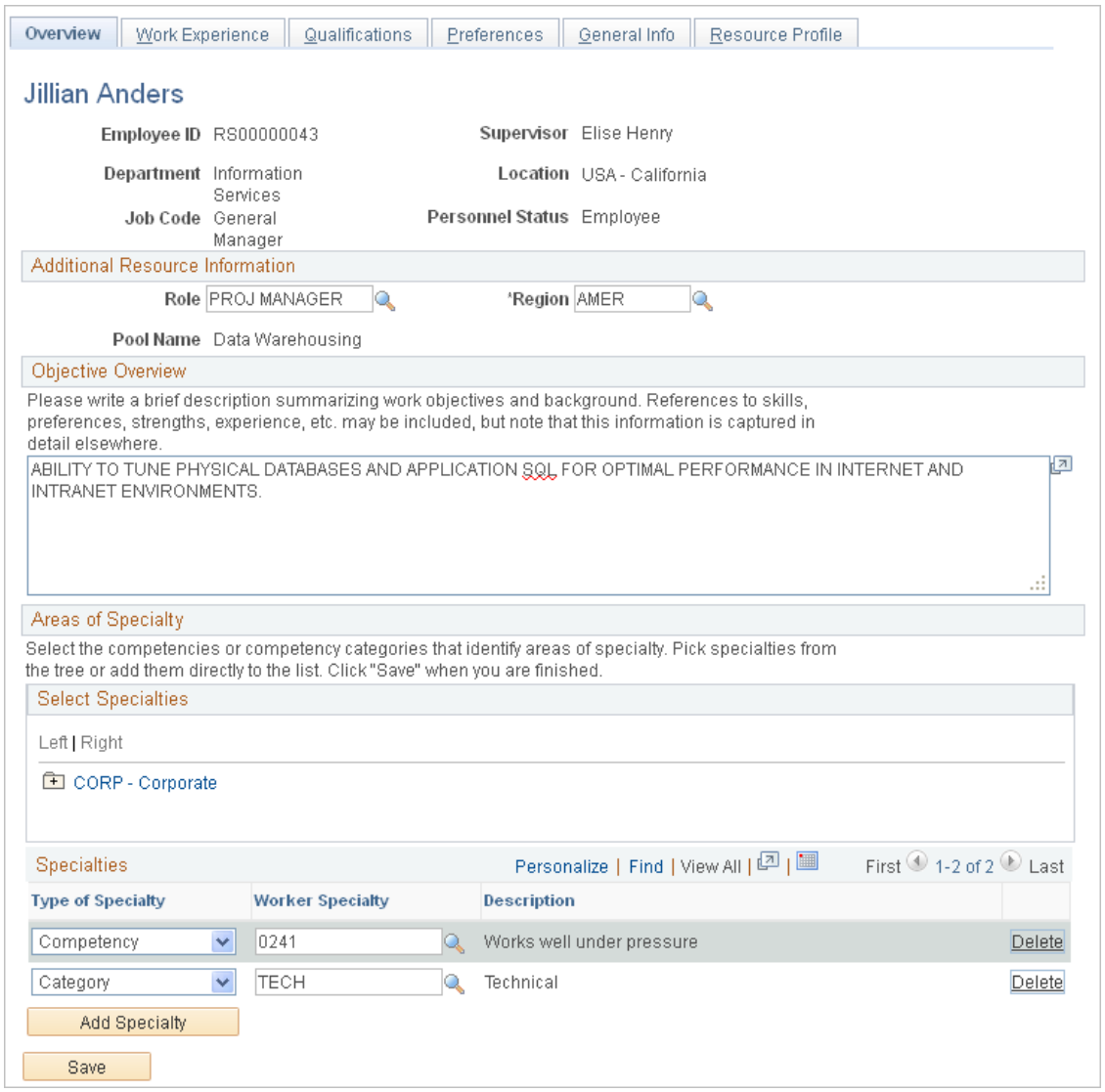
Navigation:

- **Resource Management**, and then **Maintain Resource Profiles**, and then **Profiles**, and then **Overview**

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- **Resource Management**, and then **Maintain Resource Profiles**, and then **My Profile**, and then **Overview**

This example illustrates the fields and controls on the Profiles – Overview page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> In the Overview tab, the Job code has been set to 'SECURED', as the job code field is placed on the secure data tab in the setup options. The position and headers/titles of the secure fields on their original tabs remain the same. If a field is not placed on a secure data tab, then it will be visible throughout the tabs in their current place on the resource profile. Similar functionality applies for all the other tabs in the Maintain Resource Profiles.

See Application Fundamentals: Setting Up Cross-Application Installation Options.

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Field or Control	Description
Additional Resource Information	Enter the project role and region for the resource. This data is initially populated when the resource is established as a PeopleSoft Resource Management resource. You can update it on this page. The **Pool Name** field is not editable. To change the pool to which the resource belongs, the pool manager must transfer the resource from his or her current pool. See Managing Pool Resources.
Objective Overview	Enter a summary of work objectives and background that a staffing coordinator can use when considering the resource for an assignment.
Select Specialties	Enter specialties from the Competency tree that reflect relevant professional expertise. Specialties provide a means to highlight primary skills. Many resources have a long list of competencies ranging from technical to interpersonal skills; specialties; however, focus attention on core competencies. If you select a node from the tree, the specialty appears in the **Specialties** grid with the specialty type value *Category*. If you select a detail value, the specialty appears with the specialty type value *Competency*. **Note:** You can select specialties from the tree or click the **Look up Worker Specialty** icon.
Type of Specialty	Enter a type: *Category:* Select if the specialty represents a broad area of competency, such as managerial experience. *Competency:* Select if the specialty represents specific competencies that the resource possesses, such as strategic planning or project management experience.
Worker Specialty	Enter the individual competency or category of competency that the resource possesses.
Delete	Click to delete the competency or category from the resource profile.
Add Specialty	Click to add additional competencies or categories as specialties.

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

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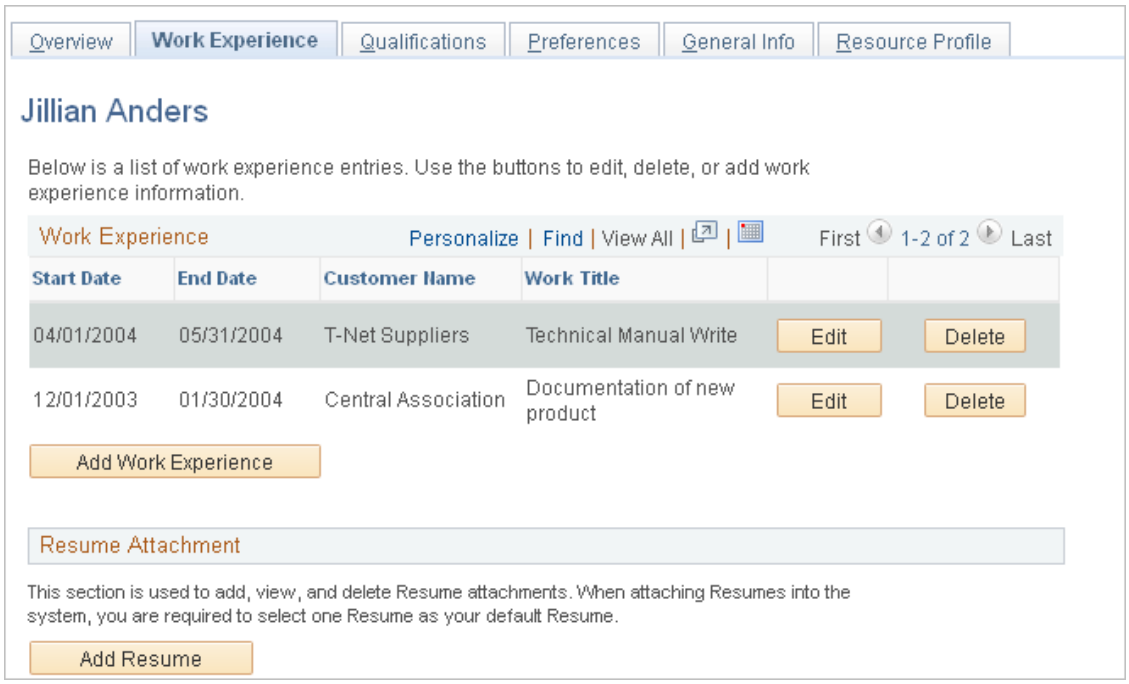
Profiles - Work Experience Page

Use the Profiles - Work Experience page (RS_ERES_WORK_HIST) to view a resource's work experience information.

Navigation:

Click **Work Experience** on any Resource Profile page.

This example illustrates the fields and controls on the Profiles - Work Experience page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> Resource Matching uses the **Work Description** field on the Work Experience edit page to calculate Work Experience factor fit scores.

A resource's past, present, and future work assignments appear on the page. The system automatically adds a work experience entry to the page each time the resource placed on an assignment in the status *Assigned* or *Pending Approval* in PeopleSoft Resource Management. You can modify or enhance the entry for further clarity.

If a resource's assignment is canceled before the start date, the system automatically deletes the work experience entry from this page. If the assignment is canceled after the start date but before the assignment end date, the system automatically changes the work experience end date to the assignment cancellation date.

You can manually create work experience entries to record previous work experience that occurred at another company or before implementing PeopleSoft Resource Management.

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Field or Control	Description
Start Date and **End Date**	Displays past, current, or future assignment dates.
Customer Name and **Work Title**	Displays the customer and description for the assignment.
Edit	Click to access the Work Experience edit page to modify the work experience line.
Add Work Experience	Click to access the Work Experience edit page to enter new work experience information by adding any work information that is not initiated in PeopleSoft Resource Management. Work experience that you add here does not appear on the resource schedule; however, it is used by Resource Matching and can be reviewed by users who evaluate candidates.

Resume Attachment

Click **Add Resume** to add a resumé attachment.

Field or Control	Description
File Name	Click the link to open the resumé document attachment for the resource.
Browse	Click to browse through directories and locate the appropriate resumé document. Highlight the document and click **Open** to populate the attachment box with the document directory path.
Upload	Click to upload the selected document to the resource profile.
Default	Designates the default resumé document. If multiple resumé documents are available, specify the default for use by Resource Matching.
Delete	Click to remove the resumé document attachment from the resource profile.

Profiles - Qualifications Page

Use the Profiles - Qualifications page (RS_ERES_COMP_ACOMP) to view or modify a resource's qualifications that are stored in the employee source database. The check boxes at the top of each of the group boxes enable you to choose which of the resource's competencies or accomplishments must be considered when a search is made for matching service orders in the Manage Utilization page. If you choose not to consider any competencies or accomplishments, clear the **Include** <Competencies or Accomplishments> **for Search** check box displayed at the top of each of the group boxes on the Profiles - Qualifications page.

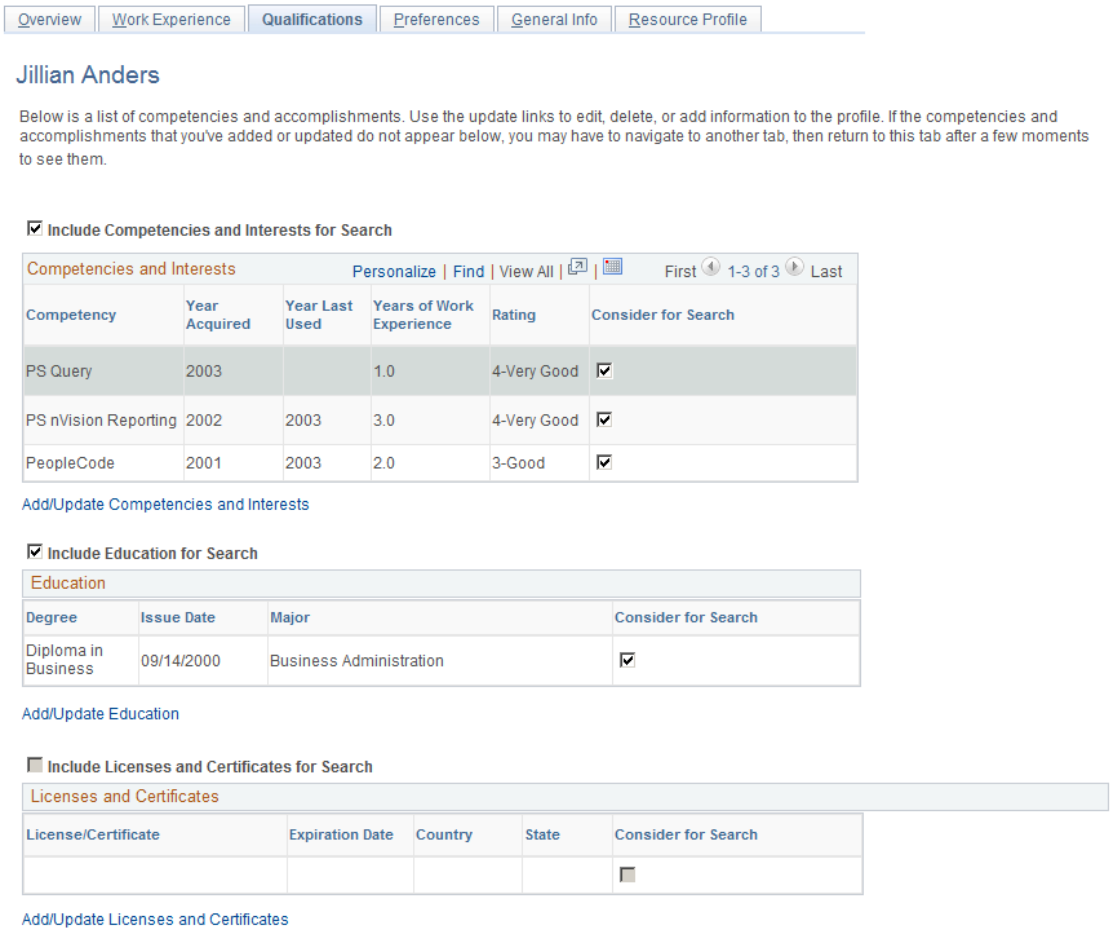
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> **Note**
>
> If you want to include specific competencies or accomplishments in the search, select the check boxes inside the group box and also the check box at the top of the group box. If the check box at the top of group box is not selected, the specific competencies and accomplishments that you selected will not be considered to be included in the search.

Navigation:

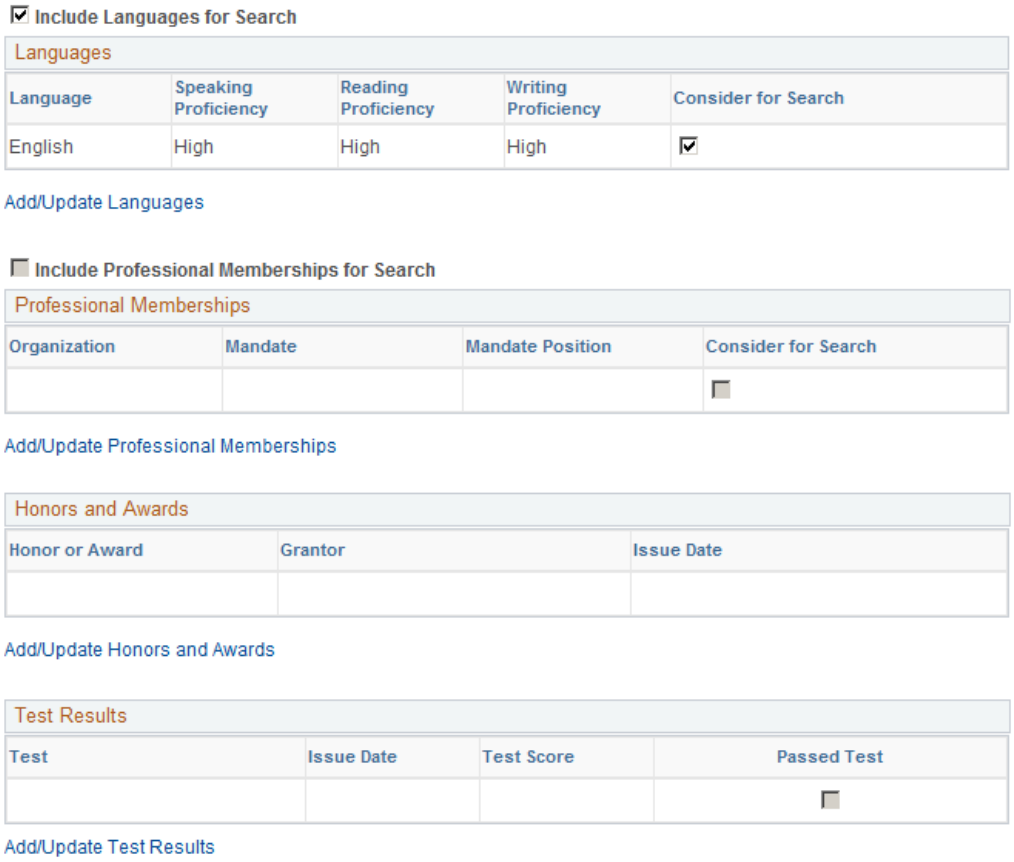
Click **Qualifications** on any Resource Profile page.

This example illustrates the fields and controls on the Profiles - Qualifications page (1 of 2).



This example illustrates the fields and controls on the Profiles - Qualifications page (2 of 2).

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Updating Qualification Information in PeopleSoft HCM

If PeopleSoft HCM is the employee source database, click the **Add/Update** link in a qualification region to access PeopleSoft HCM by using the Single Signon feature. There, you can make modifications, save your changes, and then return to the resource profile in PeopleSoft Resource Management.

Updating Qualification Information in PeopleSoft Resource Management

If the Financials database is the employee source database, click an **Add/Update** link to access the PeopleSoft Resource Management pages that you use to modify resource qualifications. This topic is discussed in more detail elsewhere in this topic.

Profiles - Preferences Page

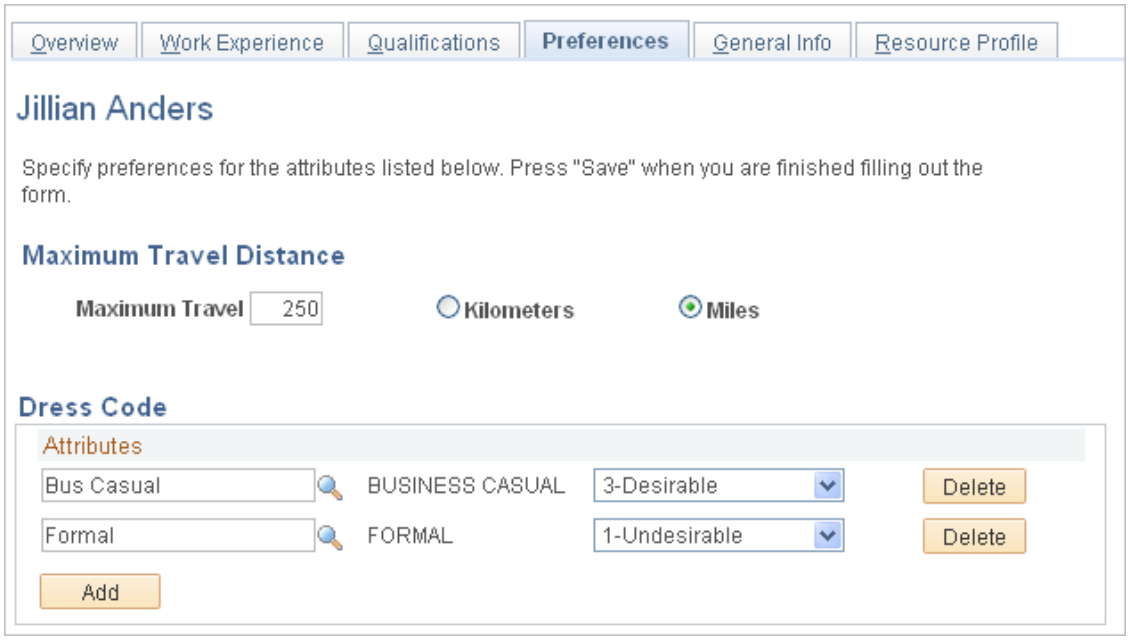
Use the Profiles - Preferences page (RS_ERES_PREFS) to view or modify resource preference information.

Navigation:

Click **Preferences** on any Resource Profile page.

This example illustrates the fields and controls on the Profiles - Preferences page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Maximum Travel, Kilometers, and **Miles**	Enter the distance that the resource prefers not to exceed when traveling to an assignment, and select the unit of measure. Maximum travel distance is for information only. It is not used by Resource Matching or any other PeopleSoft Resource Management processes.

If the organization establishes a flexible preference attribute, it appears on this page for the resource to specify values and preference levels. For example, if there is a flexible preference attribute called Work Region, the resource can specify a level of desire to work in each of the various regions.

Field or Control	Description
<Flexible Preference Attribute>	Enter values that represent preferences for each attribute and enter the preference levels. **Note:** The preference level values are defined on the interest rating model (INT) during implementation. The Resource Matching process uses the INT values to calculate the Flexible Preference factor. An administrator can modify the INT values as required. If you integrate with PeopleSoft HCM, rating models are maintained in the HCM database. If you use the Financials database as the employee source database, rating models are maintained in PeopleSoft Resource Management. See Establishing Application Setup Tables for Competencies.
Add	Click this button to add flexible preference attribute values.

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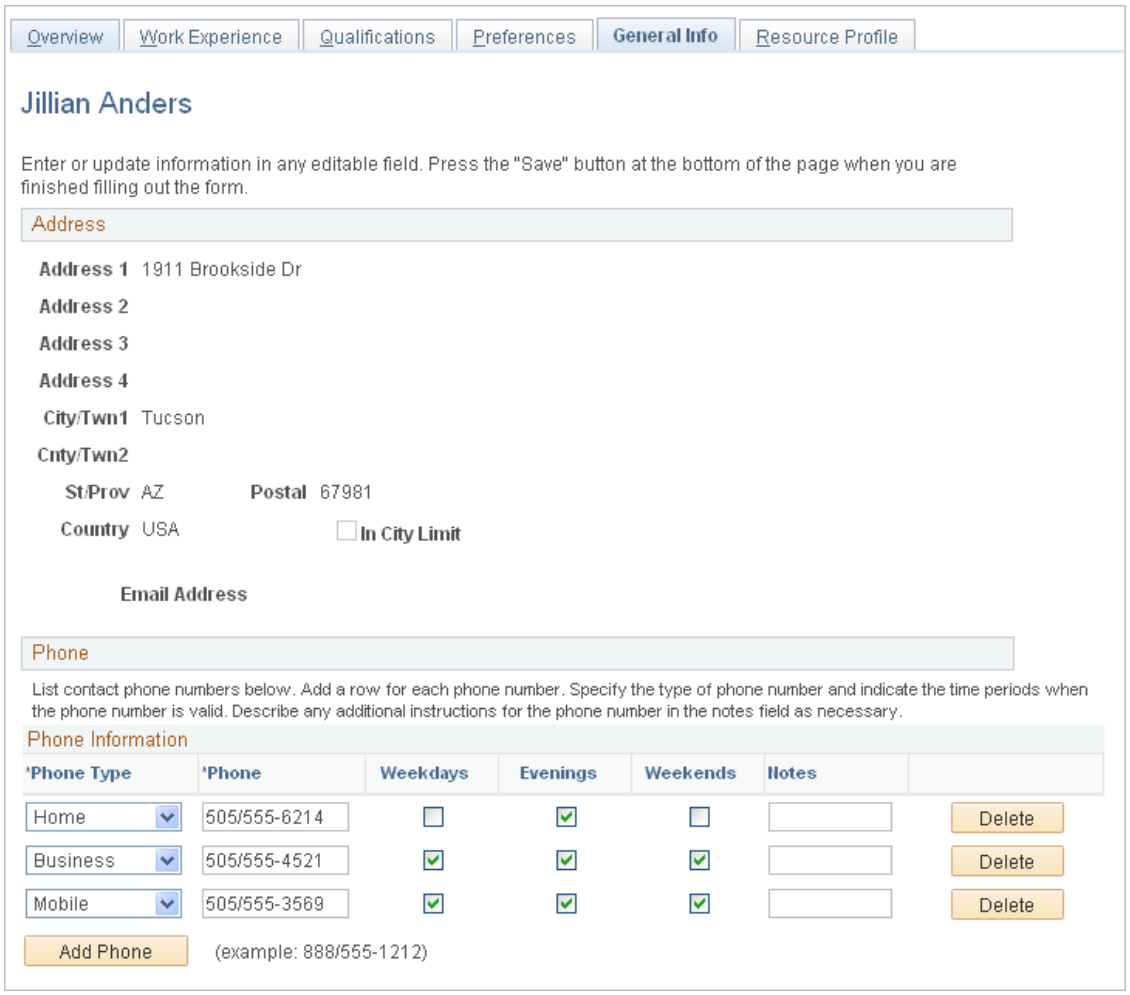
Profiles - General Info Page

Use the Profiles - General Info page (RS_ERES_GEN_INFO) to view or modify a resource's contact information, job, passports and visas, weekly work days, home airport, assignment restrictions, and flexible resource attribute values.

Navigation:

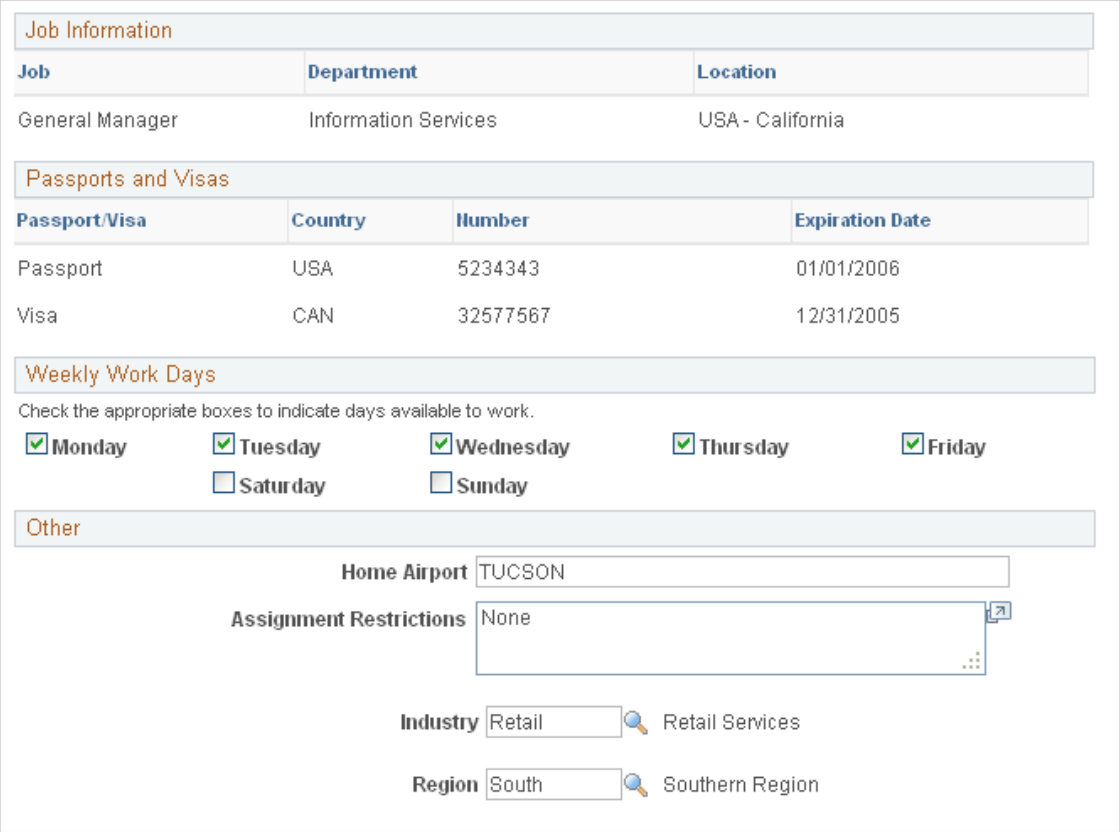
Click **General Info** on any Resource Profile page.

This example illustrates the fields and controls on the Profiles - General Info page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Profiles - General Info page (2 of 2). You can find definitions for the fields and controls later on this page.

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You cannot modify address, job information, or passport and visa information on this page; you must update this information in the employee source database tables. For example, if the Financials database is the employee source database, you can update this information using the Personal Data component (RS_CM_PERSONAL).

Address

View the resource's street address, city, town, county, province, state, postal zip code, and country. Additionally, view the email address for the primary email account of the user ID that is associated with this resource. The email address is used when the system notifies the resource of date or status changes on assignments.

Phone

Enter a phone number, the type of phone number entered, and the days of the week that the resource can be reached at that number.

Job Information

Review the job title, department, and location with which the resource is affiliated, as defined in the employee's Job record. If the resource has multiple jobs, the job that is specified for use in PeopleSoft Resource Management appears.

Passports and Visas

Review passports or visas held by the resource as defined in the employee source database.

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Weekly Work Days

Select the appropriate check boxes to indicate the days of the week that the resource is available to work.

Weekly work days are used to determine a resource's available work days for assignments and appointments. The resource schedule uses shading to indicate the work days that are not available.

Other

Field or Control	Description
Home Airport	Enter the name of the preferred home airport (for information only).
Assignment Restrictions	Enter any special restrictions or requirements, such as wheel chair access (for information only).

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

Field or Control	Description
<**Flexible Resource Attribute**>	Enter or look up the appropriate value for each attribute.
Add	Click to add flexible attribute values, if the attribute allows multiple values.

Profiles - Resource Profile Page

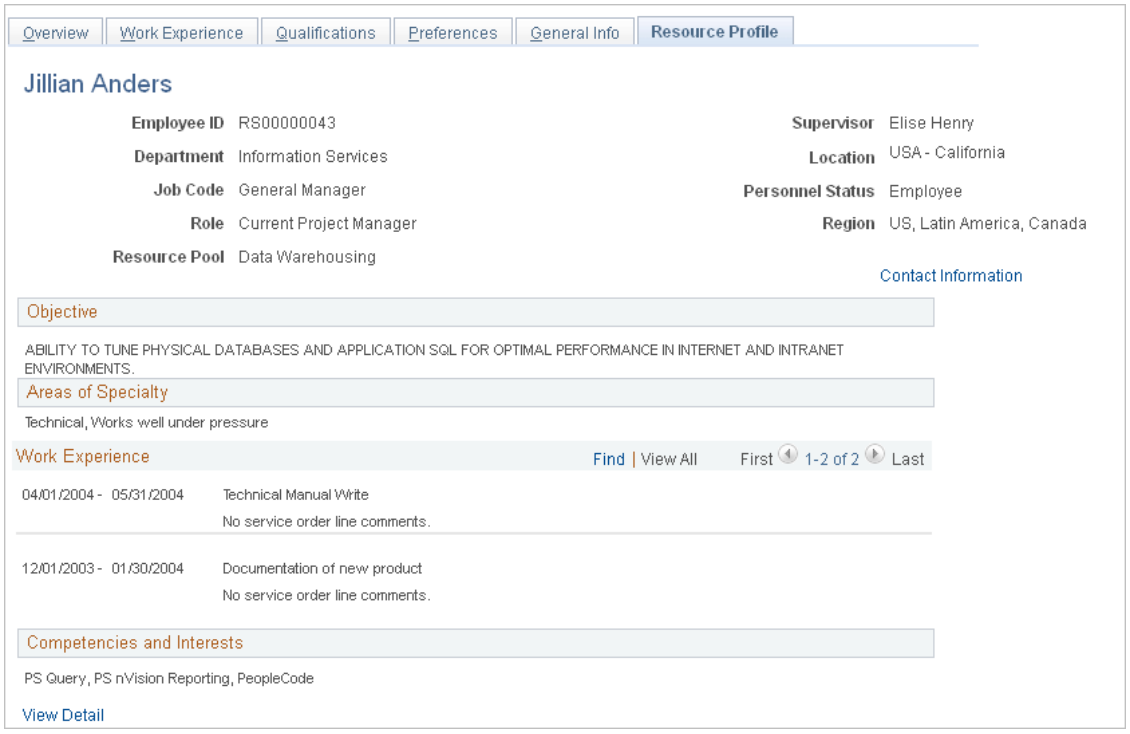
Use the Profiles - Resource Profile page (RS_RES_PROF_RVW) to review consolidated resource profile information in a resumé format.

Navigation:

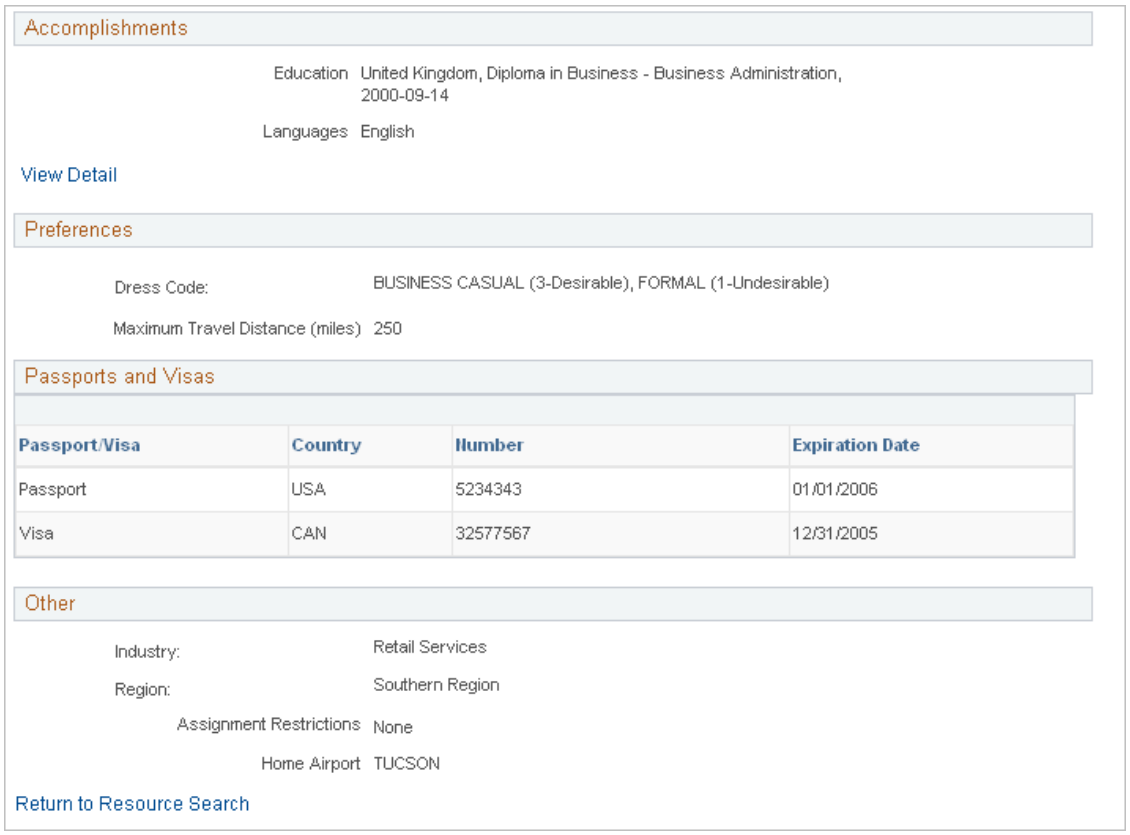
- **Resource Management**, and then **Maintain Resource Profiles**, and then **Profiles**, and then **Resource Profile**
- Click **Resource Profile** on any Resource Profile page.

This example illustrates the fields and controls on the Profiles – Resource Profile Page (1 of 2). You can find definitions for the fields and controls later on this page.

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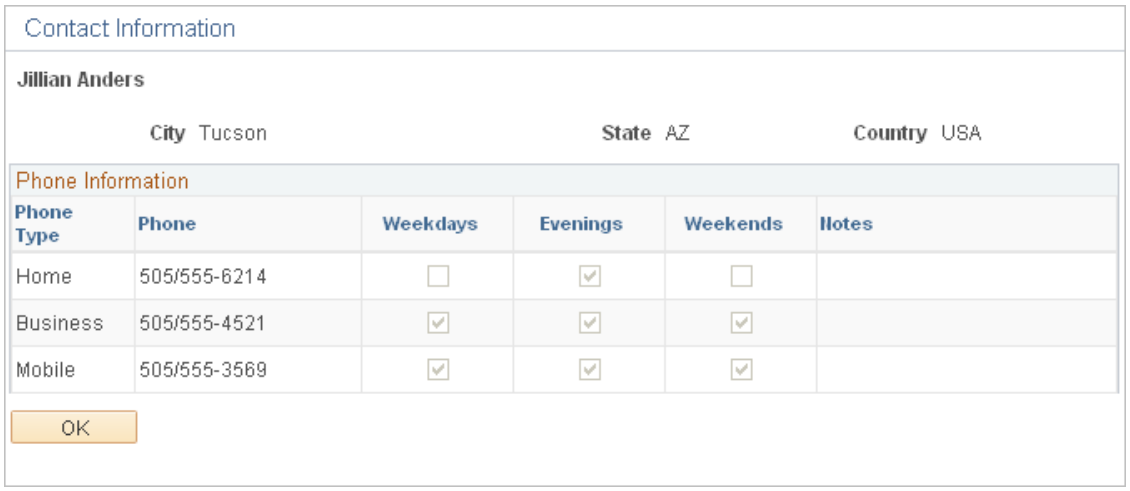


This example illustrates the fields and controls on the Profiles – Resource Profile Page (2 of 2). You can find definitions for the fields and controls later on this page.



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This example illustrates the fields and controls on the Profiles – Resource Profiles Contact Information. You can find definitions for the fields and controls later on this page.



This page consolidates the resource profile sections into a single, display-only format. A group box appears on this page if the following two conditions are true:

- It is selected during implementation to appear on the Resource Profile display-only summary page.
- It contains data for the resource.

Field or Control	Description
Contact Information	Click to access the <Resource> - Contact Information page to review the resource's city, state, country, and telephone information from the Profiles - General Info page.
View Detail and **View Summary**	Click **View Detail** in the **Competencies and Interests** or **Accomplishments** group boxes to view the qualification details. Click **View Summary** to return to the summary view.

On installation, the administrator selects which items are to appear on the Resource Profile tab and also the resource-view only page in the Profile Display Options group box in the installation options. The six potentially secure fields on the Resource Profile tab are Job Code, Home Phone Number, Mobile Phone Number, City, Areas of Specialty, and Passport and Visa Numbers.

If one of the items chosen for the Resource Profile tab (and also the resource-view only page) is also a secure data field and if the user does not have access to this secure data field, then the header for this field will still be shown on the Resource Profile tab, but the actual data will be replaced with the word SECURED. If the user has security access to a secure data tab that has a data field enabled, then they *will be able to see* this field on the Resource Profile tab and also on the Resource-view only page.

If the field has not been assigned to either Secure Data 1 tab or Secure Data 2 tab, it is not considered a secure field and, therefore, would be visible on this tab and on the resource-view only page.

If they are viewing their own profile, then they should be able to see all fields on the Resource Profile tab and on the Resource-view only page.

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When updating their own data at Resource Management, Maintain Resource Profiles, My Profile, the system disregards all secure data rules. There are no secure data tabs. The user can update and view their information exactly as they currently can with the fields in their current positions on the tabs.

Modifying Resource Qualifications

If PeopleSoft Resource Management is the employee source database for a resource, you maintain the resource's qualifications in the Financials database. These qualifications can consist of:

- Competencies and interests.
- Honors and awards.
- Language skills.
- Licenses and certifications.
- Memberships.
- Tests and examinations.

The values that are available to select on the pages in this section are derived from the qualifications tables that are set up during PeopleSoft Resource Management implementation.

This topic discusses how to modify resource qualifications.

> **Note**
>
> If PeopleSoft HCM is the employee source database for the resource, then when you modify the resource's competencies, interests, and accomplishments in the resource profile, you are transferred to the Person Profile component in PeopleSoft HCM. After you modify qualification information that is stored in the HCM database and return to the resource profile, your changes may not be visible until you refresh the Resource Profile component (RS_WRKR_PROFILE).

Pages Used to Modify Resource Qualifications

Page Name	Definition Name	Usage
Competencies Page	RS_CM_COMPTNCY	Modify a resource's competencies and interests.
Education Page	RS_CM_EDU	Review or modify a resource's education information.
Education - Education Detail Page	RS_CM_EDU_DET	View or modify a resource's education information. Education Page
Licenses and Certificates Page	RS_CM_LIC_CERT	Modify a resource's license and certificate information.
Languages Page	RS_CM_LANG	Modify a resource's language information.
Professional Memberships Page	RS_CM_MEMBR	Modify a resource's membership information.

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Page Name	Definition Name	Usage
Honors and Awards Page	RS_CM_HNR_AWRDS	Modify a resource's honors and awards.
Test Results Page	RS_CM_TEST_RSLT	Update a resource's test information.

Competencies Page

Use the Competencies page (RS_CM_COMPTNCY) to modify a resource's competencies and interests.

Navigation:

- **Resource Management**, and then **Maintain Resource Profiles**, and then **Maintain Resource Profile**

  Select the **Qualifications** tab on any Resource Profile page.

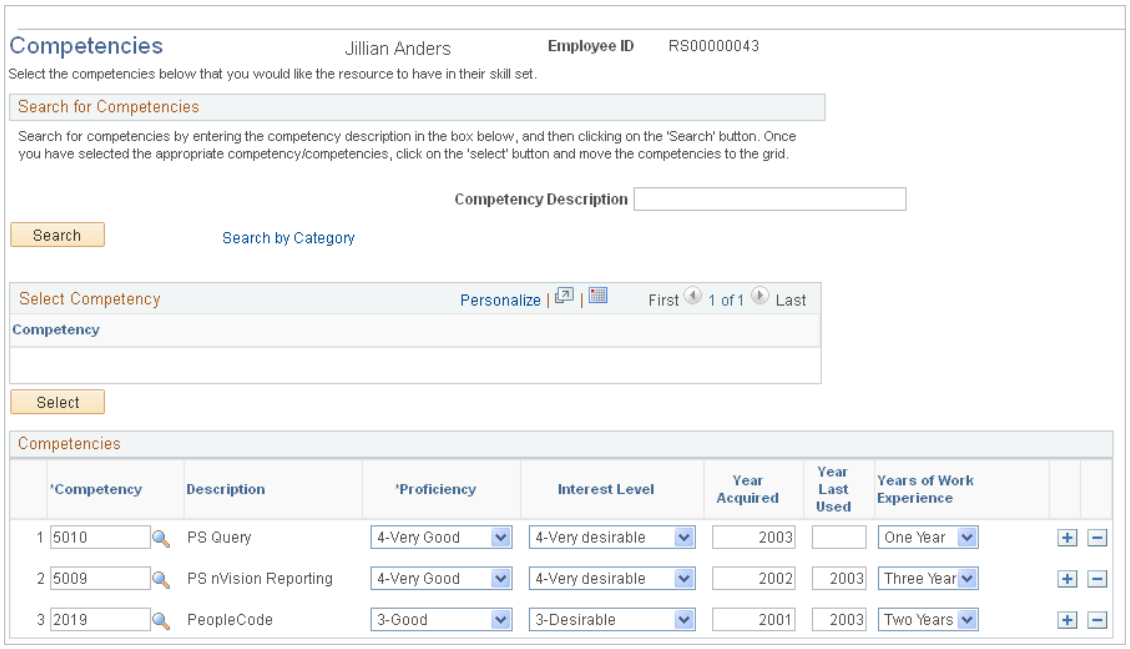
  Click **Add/Update Competencies and Interests** on the Resource Profile - Qualifications page.

- **Resource Management**, and then **Maintain Resource Profiles**, and then **My Resource Profile**

  Select the Qualifications tab.

  Click **Add/Update Competencies and Interests** on the Resource Profile - Qualifications page.

This example illustrates the fields and controls on the Competencies page. You can find definitions for the fields and controls later on this page.



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> **Note**
>
> Competencies are used by Resource Matching.

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

Search for Competencies

Field or Control	Description
Competency Description	Enter characters from the competency description. For example, *World Banking* can appear as a search result if you enter *Bank*.
Search	Click to view a list of competencies that match the description.
Select (check box)	Select check boxes corresponding to the appropriate competencies.
Select (button)	Click to move the competencies to the **Competencies** group box.

Click the **Search by Category** link to access the Competency tree (COMPETENCY) and select competencies from competency categories. Expand the nodes as needed to find the desired competency. Click a competency to add it to the **Competencies** grid.

Competencies

Enter competencies' corresponding proficiency and interest level values. Enter relevant information regarding the year the competency was acquired or last used, and the total number of years that the resource spent using the competency.

Field or Control	Description
Proficiency	Select the degree to which the resource is proficient in the competency. The PeopleSoft Competency Management Scale rating model (PSCM) uses the following scale: *5-Expert, 4-Very Good, 3-Good, 2-Fair, 1-Little,* and *0-None.* However, you can establish a proficiency rating scale for every competency.
Interest Level	Select the resource's level of interest in the competency. The Interest rating model *(INT)* (which Resource Matching uses) has the following scale: *4-Very Desirable, 3-Desirable, 2-No Preference, 1-Undesirable,* and *0-Very Undesirable.*
Years of Work Experience	Select the number of years of experience that the resource possesses for this competency. You can select from no years to *9+ Years.*

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> **Note**
>
> Competency information is populated in sPro SR from RM SO. This information includes competency of type License, degrees along with proficiency, and years of experience.
>
> When an SR is created in sPro, the competencies column within Resource Management for the SO line is locked so that the user cannot modify the competencies. However, the user can still create a new SO line and also be able to select a resource internally even though an SR is created for the SO.

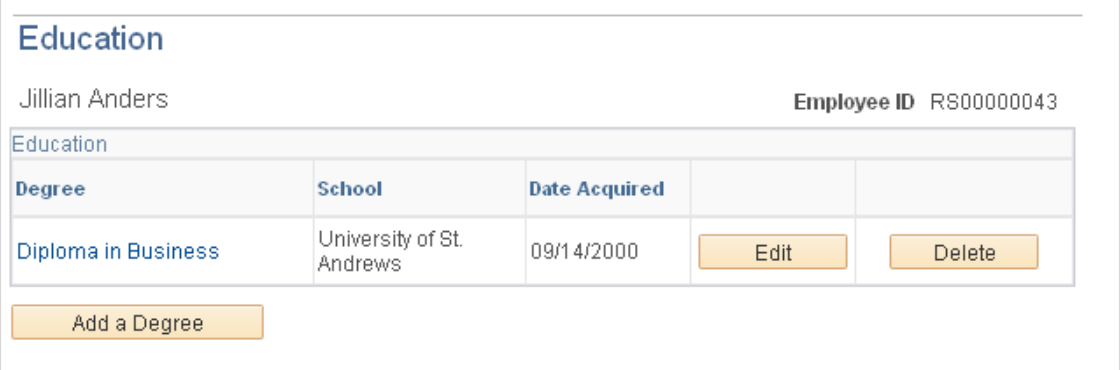
Education Page

Use the Education page (RS_CM_EDU) to review or modify a resource's education information.

Navigation:

Click **Add/Update Education** on the Resource Profile - Qualifications page.

This example illustrates the fields and controls on the Education page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> The Resource Matching process uses the education information.

Field or Control	Description
Degree	Click a degree name to access the Education Detail page to view degree information.
Edit	Click to access the Education Detail page for the corresponding row and view or modify the degree information for this resource.
Delete	Click to immediately delete the corresponding degree row.

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Field or Control	Description
Add a Degree	Click to access the Education Detail page to add a degree for this resource.
Return to Qualification Profile	Click to return to the resource profile.

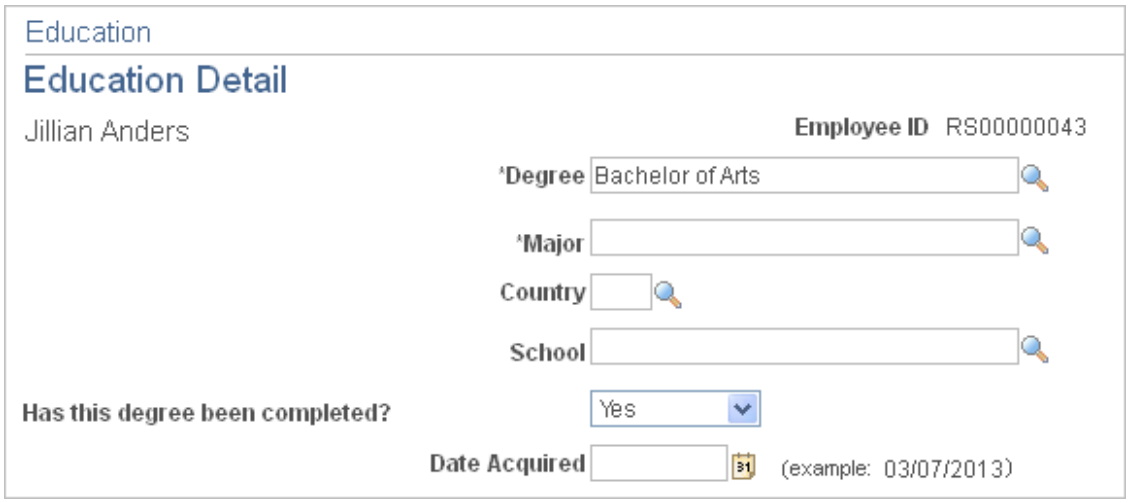
Education Detail

Use the Education - Education Detail page (RS_CM_EDU_DET) to view or modify a resource's education information.

Navigation:

- Click a degree name on the Education page.
- Click **Add a Degree** on the Education page.

This example illustrates the fields and controls on the Education - Education Detail page.



Enter fields as appropriate and click **Save** to return to the Education page. Click **Return to Education** to discard your changes and return to the Education page.

Licenses and Certificates Page

Use the Licenses and Certificates page (RS_CM_LIC_CERT) to modify a resource's license and certificate information.

Navigation:

Click **Add/Update Licenses and Certificates** on the Resource Profile - Qualifications page.

This example illustrates the fields and controls on the Licenses and Certificates page.



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> **Note**
>
> Resource Matching uses the license and certificate information.

Enter the appropriate field values and save the page.

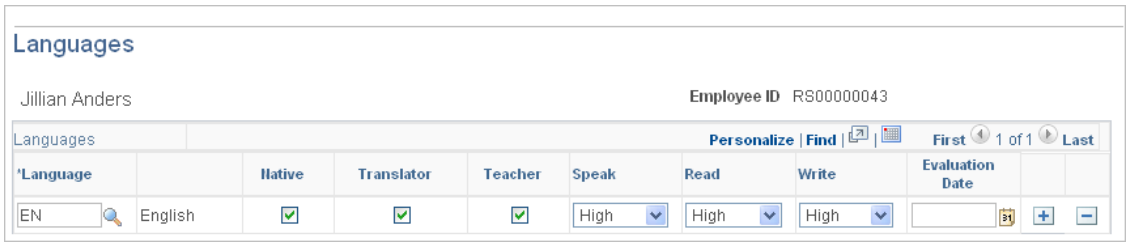
Languages Page

Use the Languages page (RS_CM_LANG) to modify a resource's language information.

Navigation:

Click **Add/Update Languages** on the Resource Profile - Qualifications page.

This example illustrates the fields and controls on the Languages page.



> **Note**
>
> Resource Matching uses the language information.

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

Professional Memberships Page

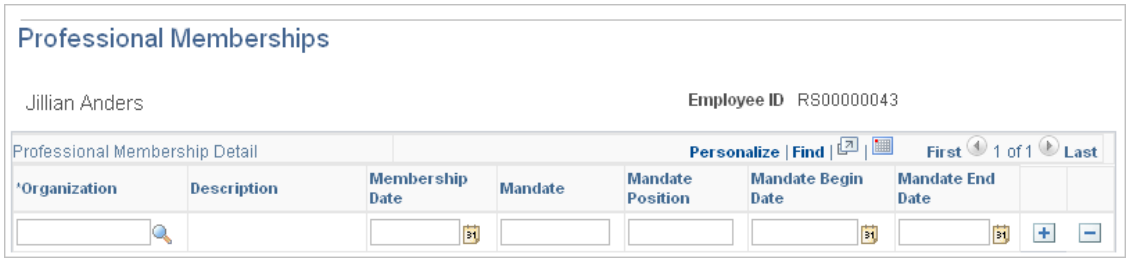
Use the Professional Memberships page (RS_CM_MEMBR) to modify a resource's membership information.

Navigation:

Click the **Add/Update Professional Memberships** link on the Resource Profile - Qualifications page.

This example illustrates the fields and controls on the Professional Memberships page. You can find definitions for the fields and controls later on this page.

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> **Note**
>
> Resource Matching uses the professional membership information.

Field or Control	Description
Mandate	Enter or modify the authorized mission or goals of the member organization.
Mandate Position	Enter or modify the resource's role or authorized mission in the organization.

Enter the appropriate field values and save the page.

Honors and Awards Page

Use the Honors and Awards page (RS_CM_HNR_AWRDS) to modify a resource's honors and awards.

Navigation:

Click **Add/Update Honors and Awards** on the Resource Profile - Qualifications page.

This example illustrates the fields and controls on the Honors and Awards page.



> **Note**
>
> Honors and awards history is for information only; it is not used by the Resource Matching process.

Enter the appropriate field values and save the page.

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Test Results Page

Use the Test Results page (RS_CM_TEST_RSLT) to update a resource's test information.

Navigation:

Click **Add/Update Test Results** on the Resource Profile - Qualifications page.

This example illustrates the fields and controls on the Test Results page.



> **Note**
>
> Test results are for information only and are not used by the Resource Matching process.

Enter the appropriate field values and save the page. Click **Return to Qualification Profile** to return to the Resource Profile - Qualifications page.

> **Note**
>
> If you are managing the resource's accomplishments in PeopleSoft HCM, the **Add/Update Test Results** link does not appear on the Resource Profile - Qualifications page. You can view—but not update—resource test results in the resource profile. Use the PeopleSoft HCM system to update test results.

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Using PeopleSoft Fluid User Interface for Resource Management

Maintaining Resource Profiles Using PeopleSoft Fluid

PeopleSoft Resource Management captures and utilizes current personal and professional employee information. If you use PeopleSoft Human Capital Management (PeopleSoft HCM), this information can be synchronized with PeopleSoft Resource Management. If PeopleSoft HCM is the employee source application for resources, modifications to the resource's personal data and qualification information in the resource profile occur by way of user transfer to the Person Profile component in PeopleSoft HCM. The changes to the resource's profile information will be visible in PeopleSoft Resource Management when the user refreshes the Resource Profile component (RS_WRKR_PROFILE_FL). For more information, see Understanding PeopleSoft Resource Management and PeopleSoft HCM If you do not use PeopleSoft HCM, you can enter employee data into PeopleSoft Resource Management. PeopleSoft Resource Management can be your employee source database for a resource where you maintain the resource's qualifications. For more information, see Understanding PeopleSoft Resource Management and PeopleSoft HCM

If you do not use PeopleSoft HCM, you can enter employee data into PeopleSoft Resource Management. PeopleSoft Resource Management can be your employee source database for a resource where you maintain the resource's qualifications. For more information, see Understanding PeopleSoft Resource Management Without PeopleSoft HCM

Pages Used to Maintain Resource Profiles Using PeopleSoft Fluid

Page Name	Definition Name	Usage
Overview Page	RS_RP_OVERVIEW_FL	View or modify a resource's basic information.
Work Experience Page	RS_RP_WORKHIST_FL	View a resource's work experience information.
Qualifications — Competencies and Interests Page	RS_RP_COMPTNCY_FL	View or modify a resource's competencies and interests.
Qualifications — Education Page	RS_RP_DEGREE_FL	Review or modify a resource's education information.
Qualifications — Licenses and Certificates Page	RS_RP_LICENSE_FL	View or modify a resource's license and certificate information.
Qualifications — Languages Page	RS_RP_LANGUAGE_FL	View or modify a resource's language information.
Qualifications — Professional Memberships Page	RS_RP_MEMBERSHP_FL	View or modify a resource's membership information.
Qualifications — Honors and Awards Page	RS_RP_HONORS_FL	View or modify a resource's honors and awards.

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Page Name	Definition Name	Usage
Qualifications — Test Results Page	RS_RP_TESTS_FL	Update a resource's test results.
Preferences Page	RS_RP_PREFS_FL	View or modify resource preference information.
General Information - Address Page	RS_RP_ADDRESS_FL	View the resource's address and personal data.
General Information - Phone Page	RS_RP_PHONE_FL	View or modify a resource's contact information.
General Information - Job Information Page	RS_RP_JOBINFO_FL	Review the job title, department, and location with which the resource is affiliated, as defined in the employee's Job record.
General Information - Passports and Visas Page	RS_RP_PASSPORT_FL	Review passports or visas held by the resource as defined in the employee source database.
Resource Search Page	RS_WRKR_SRCH_FL	Search for resources registered in the system.

Overview Page

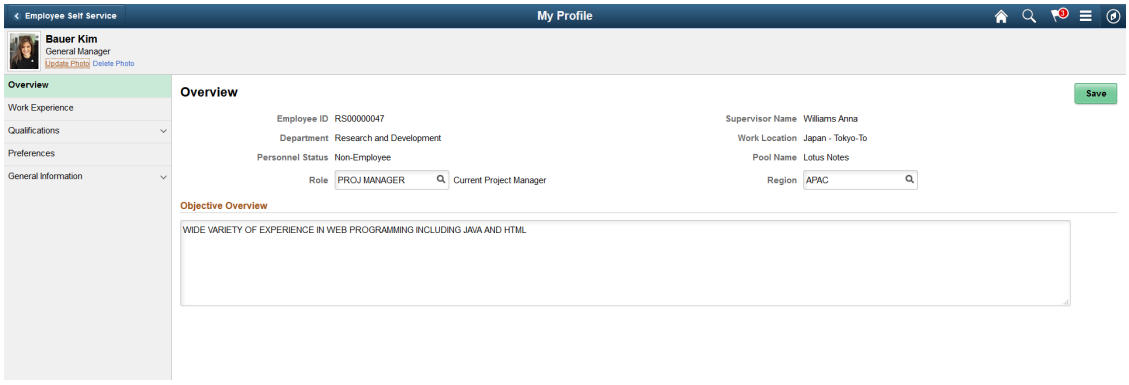
Use the Overview page (RS_RP_OVERVIEW_FL) to view or modify a resource's basic information.

Navigation:

Employee Self Service, and then **My Profile** .

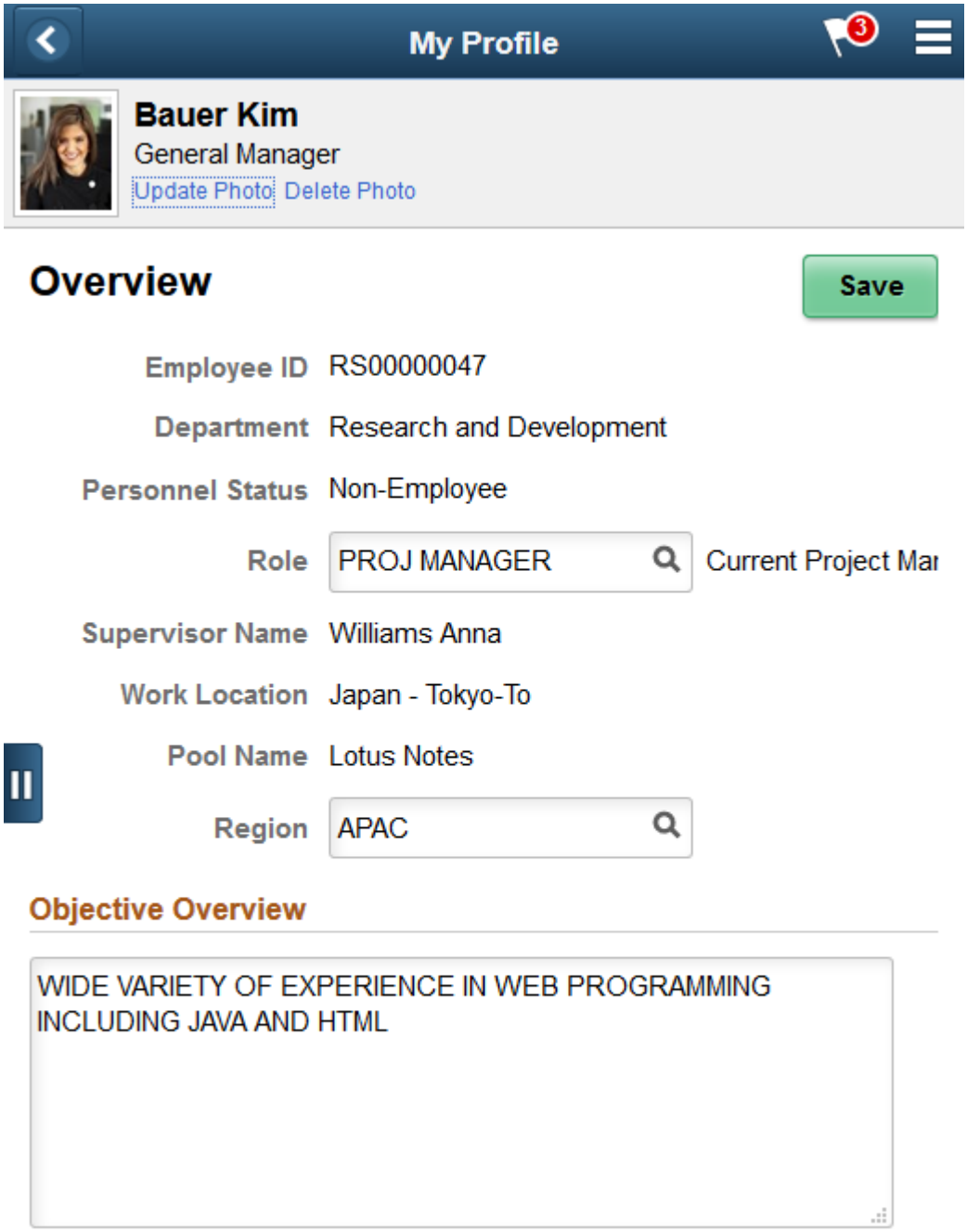
On the My Profile page, select **Overview**

This example illustrates the fields and controls on the Overview page.



This example illustrates the fields and controls on the Overview page as displayed on a smartphone.

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Select the **Save** button to save any changes made to the fields.

A resource can update or delete their profile photo depending upon how PeopleSoft Resource Management is implemented. When PeopleSoft HCM is used as the employee source database, a resource does not have the option to update or delete their profile photo. However, if PeopleSoft Resource Management is your employee source database for a resource, then all of the data pertaining to the resource's profile are stored within tables owned by Resource Management. In this scenario, a resource will be able to update their profile photo.

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Work Experience Page

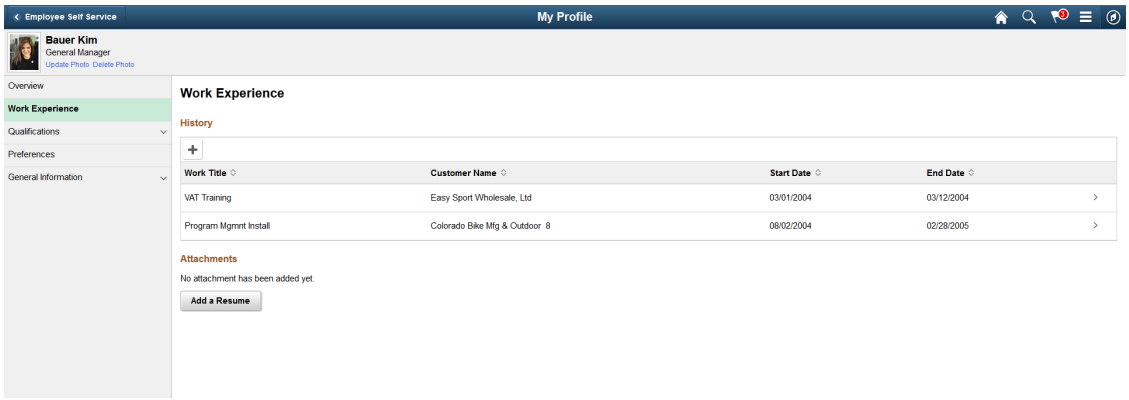
Use the Work Experience page (RS_RP_WORKHIST_FL) to view a resource's work experience information.

Navigation:

Employee Self Service, and then **My Profile** .

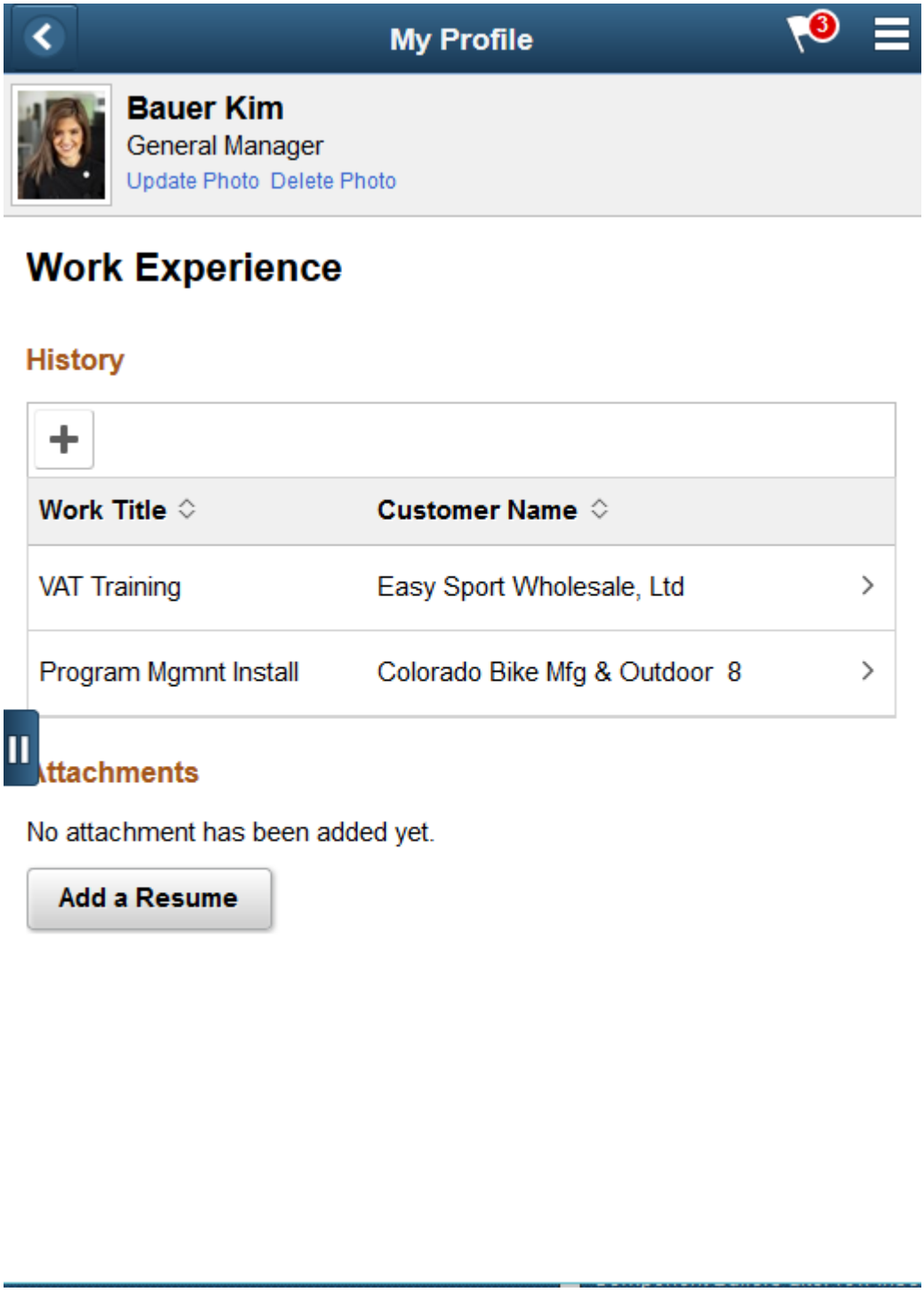
On the My Profile page, select **Work Experience**

This example illustrates the fields and controls on the Work Experience page. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Work Experience page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.

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When there is no data on the Work Experience page, a message displays that there is no work experience or attachments added yet. Select the **+** button to add work information. Select the **Add a Resume** button to upload an attachment.

Select a line in the grid to view additional details of the work information or attachments.

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Field or Control	Description
Delete	Select to delete work information or an attachment.
View Attachment	Select to view an uploaded attachment.
Default Resume	Select to indicate whether the attached file is to be considered as the primary resume. **Note:** You can mark only one attachment as the default resume. A message displays if more than one attachment is marked as a default resume.

Qualifications — Competencies and Interests Page

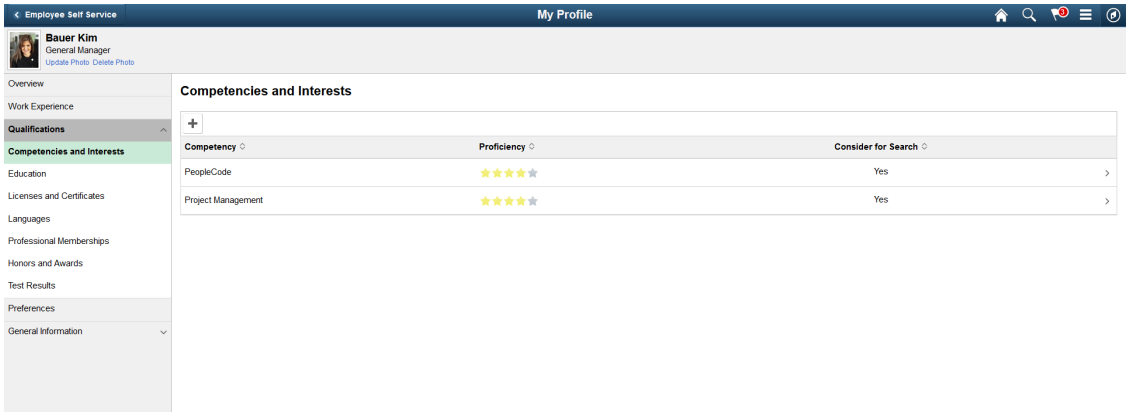
Use the Qualifications — Competencies and Interests page (RS_RP_COMPTNCY_FL) to view or modify a resource's competencies and interests.

Navigation:

Employee Self Service, and then **My Profile** .

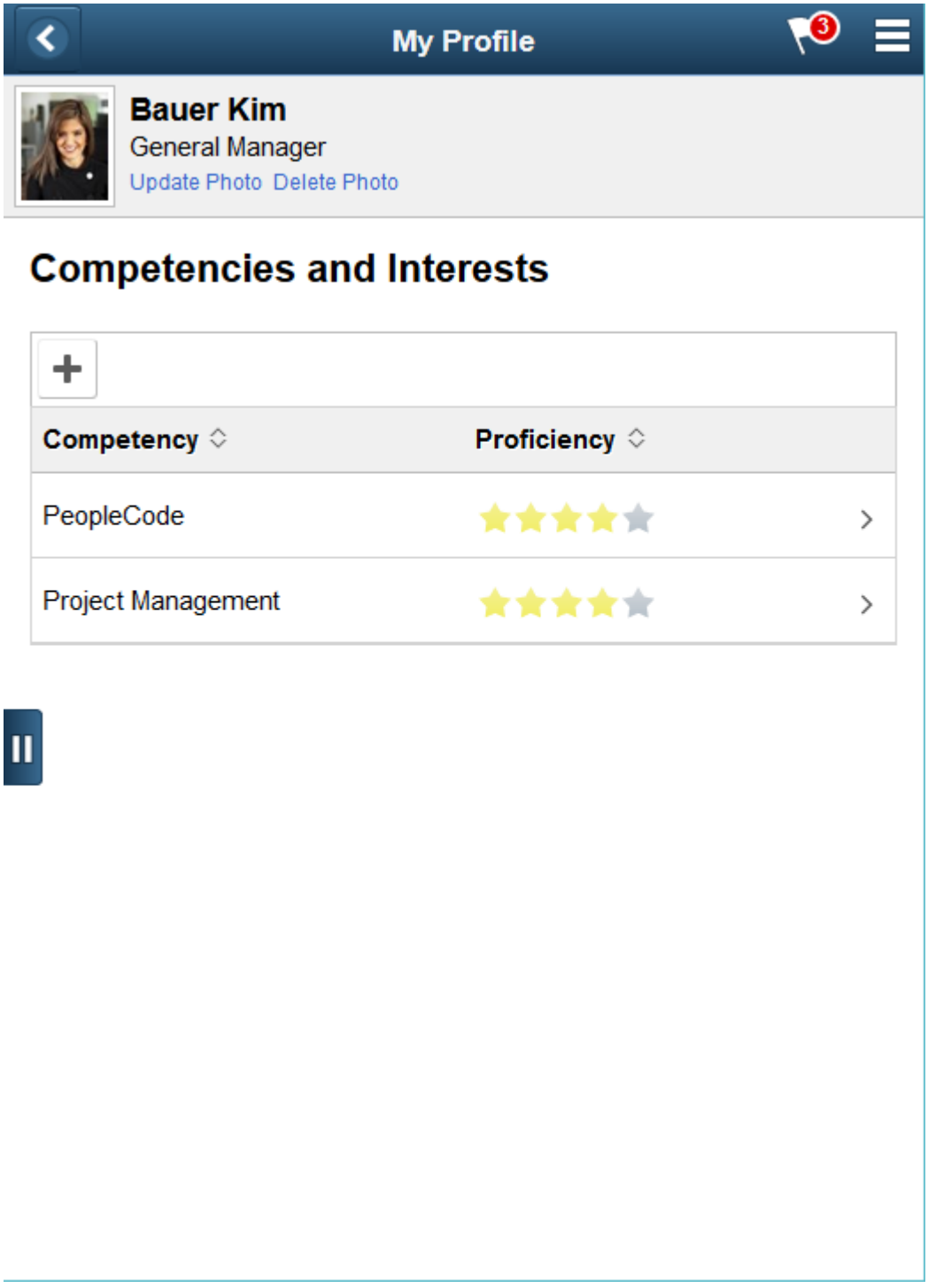
On the My Profile page, select **Qualifications** , **Competencies and Interests**

This example illustrates the fields and controls on the Qualifications — Competencies and Interests page. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Qualifications — Competencies and Interests page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.

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When there is no data on the Competencies and Interests page, a message displays that there is no competencies added yet. Select the **+** button to add a resource's competencies.

Select a line in the grid to view or update details about a competency. The stars in the grid indicate a resource's proficiency level.

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Field or Control	Description
Consider for Search	Select to set as **Yes** or **No** to indicate if a competency is to be considered when a search is made for resource.

Qualifications — Education Page

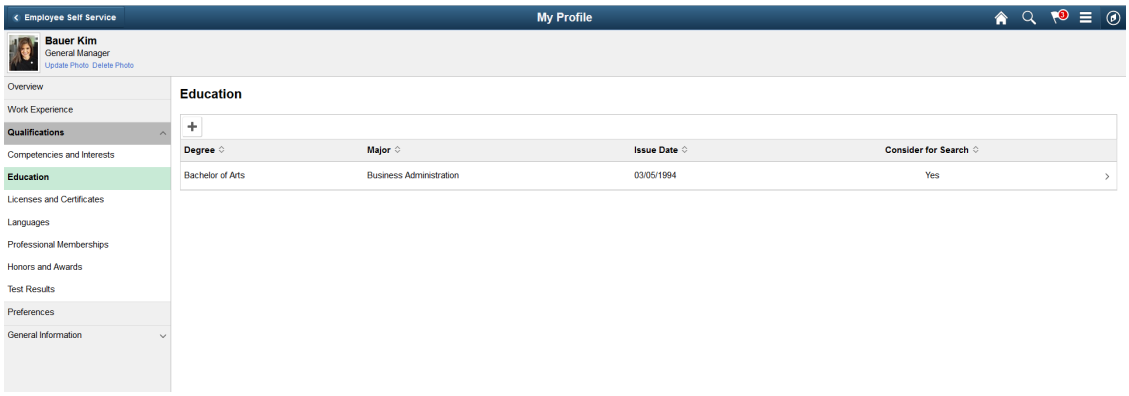
Use the Qualifications — Education page (RS_RP_DEGREE_FL) to review or modify a resource's education information.

Navigation:

Employee Self Service, and then **My Profile** .

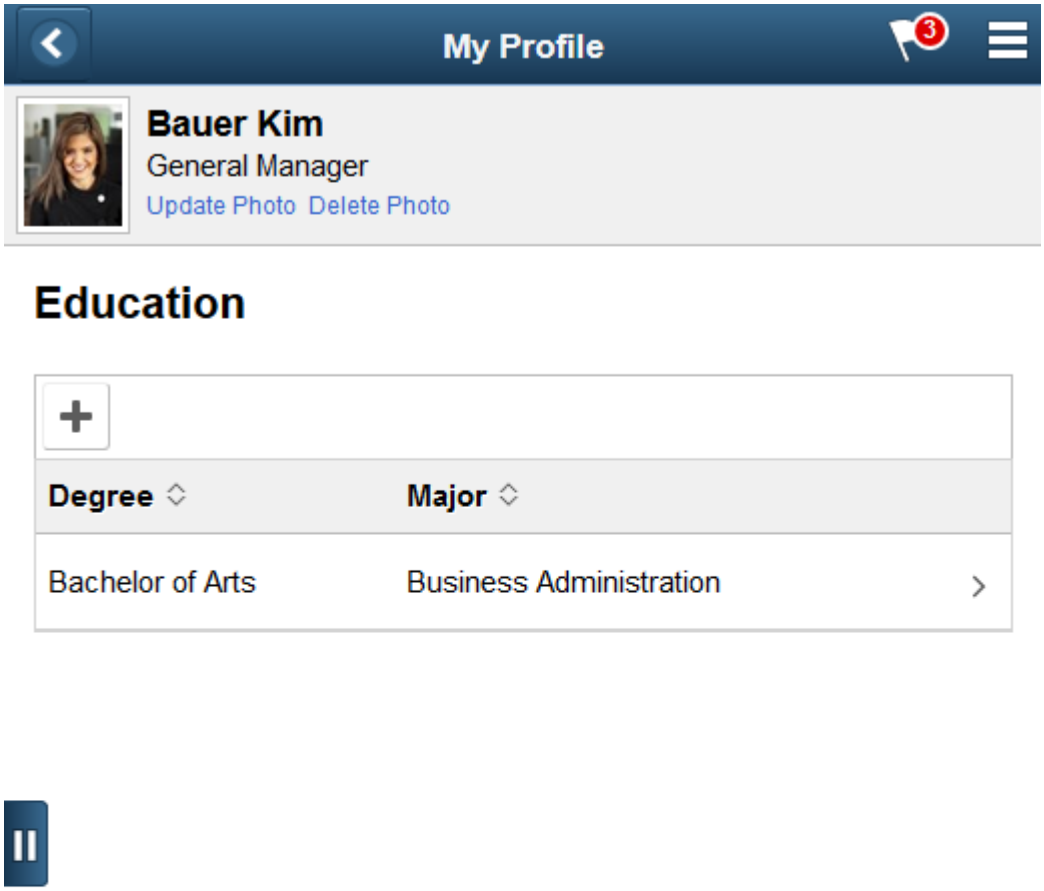
On the My Profile page, select **Qualifications**, **Education**

This example illustrates the fields and controls on the Qualifications — Education page. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Qualifications — Education page as displayed on a smartphone. You can find definitions for the fields and controls later on this page.

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When there is no data on the Education page, a message displays that there is no degrees added yet. Select the **+** button to add a resource's educational qualification.

Select a line in the grid to view or update a resource's educational qualification.

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Field or Control	Description
Consider for Search	Select to set as **Yes** or **No** to indicate if the educational details are to be considered when a search is made for a resource.

Qualifications — Licenses and Certificates Page

Use the Qualifications — Licenses and Certificates page (RS_RP_DEGREE_FL) to view or modify a resource's license and certificate information.

Navigation:

Employee Self Service, and then **My Profile**

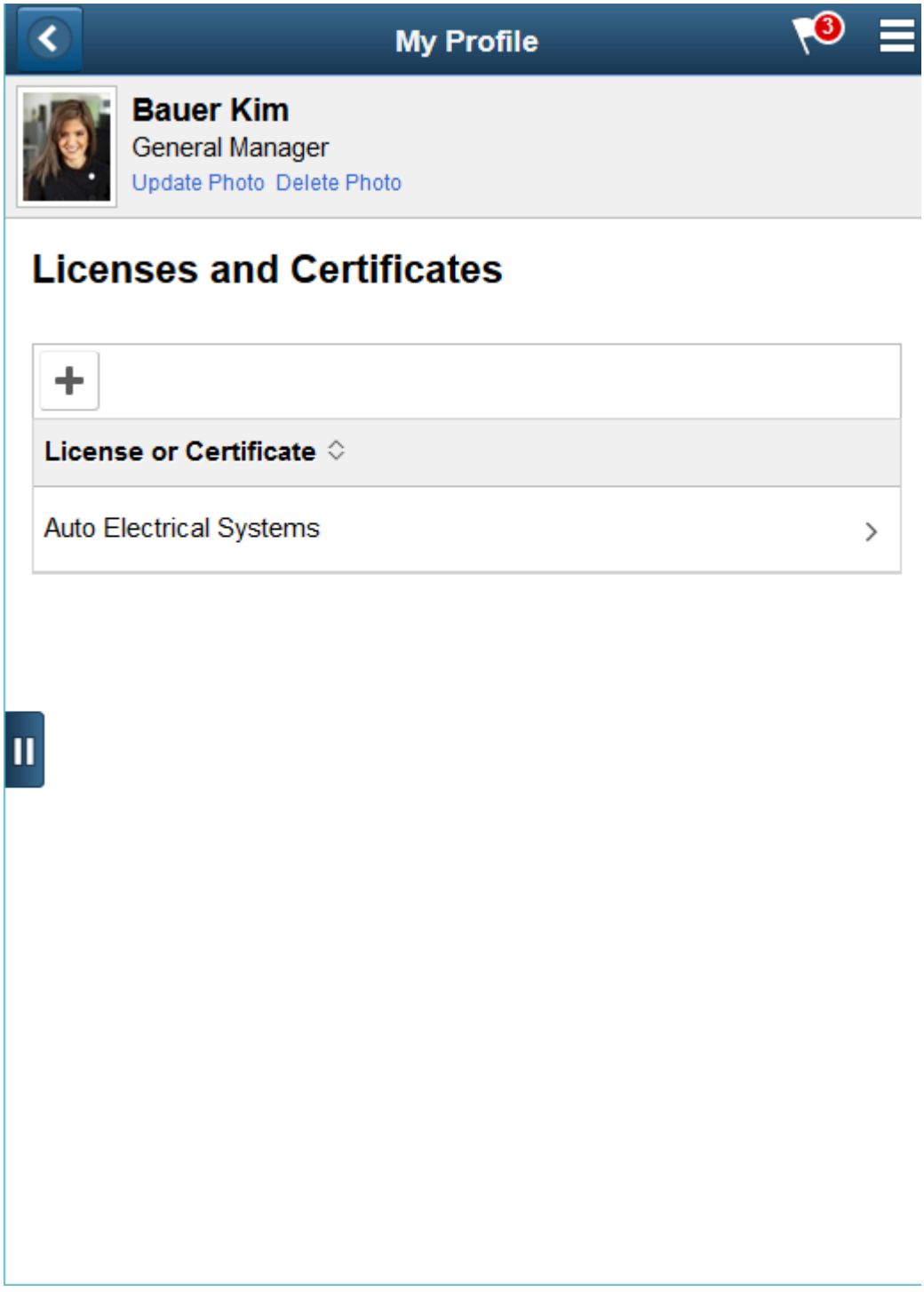
On the My Profile page, select **Qualifications** , **Licenses and Certificates**

This example illustrates the fields and controls on the Qualifications — Licenses and Certificates page.



This example illustrates the fields and controls on the Qualifications — Licenses and Certificates page as displayed on a smartphone.

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When there is no data on the Licenses or Certificates page, a message displays that there is no licenses or certificates added yet. Select the **+** button to add Licenses and Certificates.

Select a line in the grid to view or update details about licenses and certificates.

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Qualifications — Languages Page

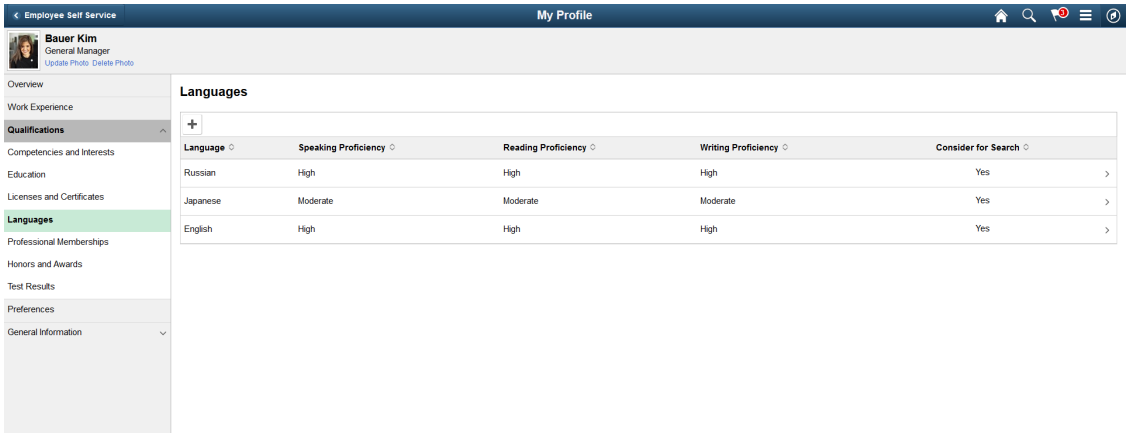
Use the Qualifications — Languages page (RS_RP_LANGUAGE_FL) to view or modify a resource's language information.

Navigation:

Employee Self Service, and then **My Profile** .

On the My Profile page, select **Qualifications**, **Languages**

This example illustrates the fields and controls on the Qualifications — Languages page.



This example illustrates the fields and controls on the Qualifications — Languages page as displayed on a smartphone.

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When there is no data on the Languages page, a message displays that there is no languages added yet. Select the **+** button to add a languages.

Select a line in the grid to view or update a resource's language information.

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Qualifications — Professional Memberships Page

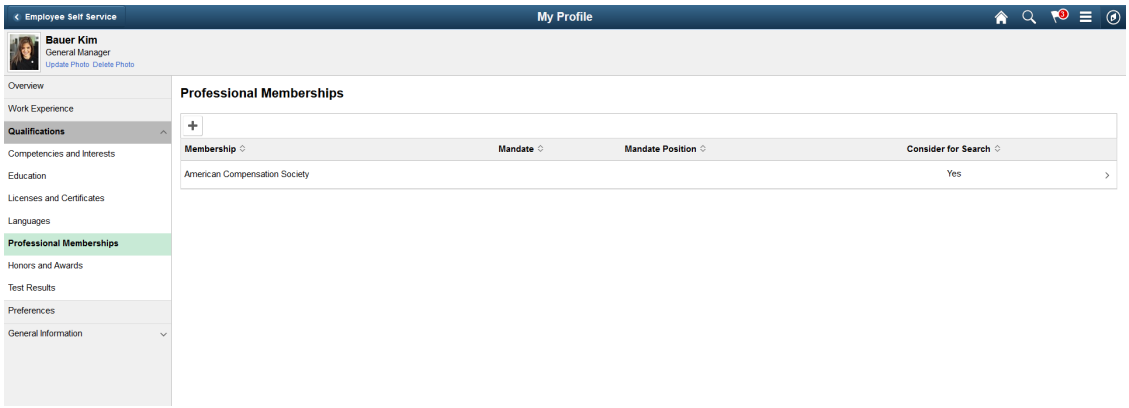
Use the Qualifications — Professional Memberships page (RS_RP_MEMBERSHP_FL) to view or modify a resource's membership information.

Navigation:

Employee Self Service, and then **My Profile** .

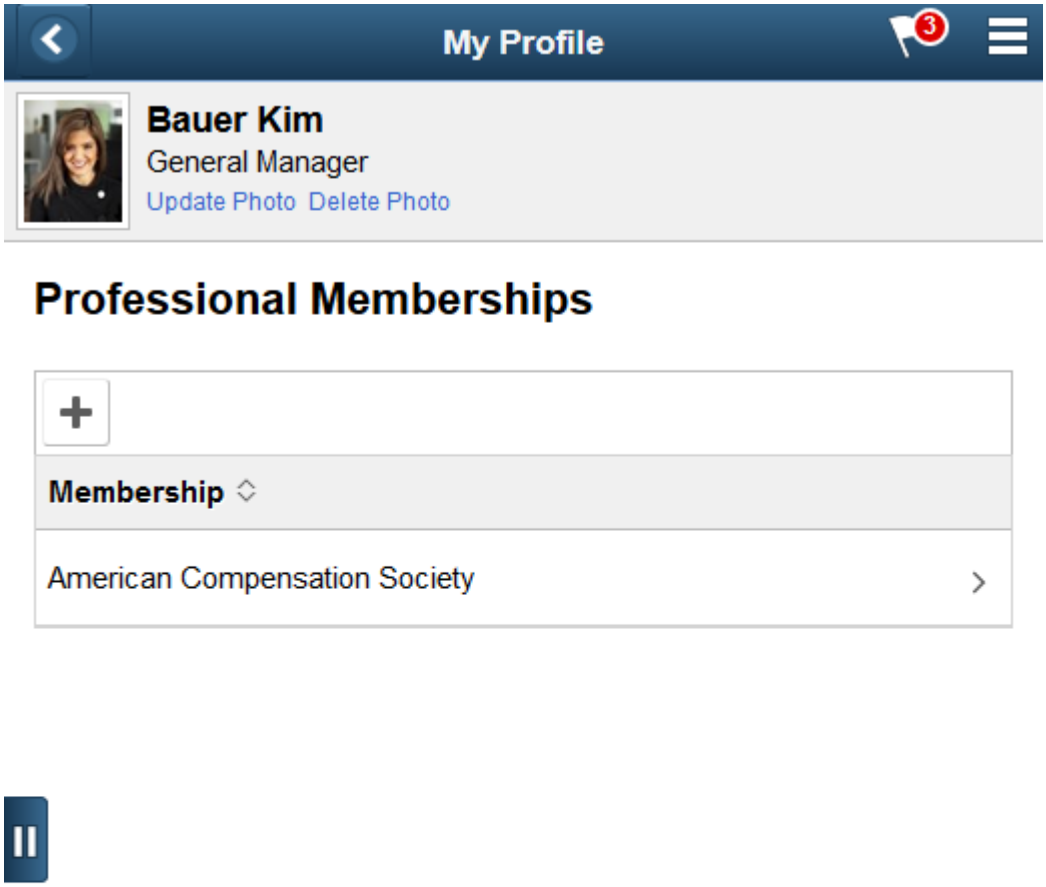
On the My Profile page, select **Qualifications** , **Professional Memberships**

This example illustrates the fields and controls on the Qualifications — Professional Memberships page.



This example illustrates the fields and controls on the Qualifications — Professional Memberships page as displayed on a smartphone.

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When there is no data on the Professional Memberships page, a message displays that there are no memberships added yet. Select the **+** button to add memberships.

Select a line in the grid to view or update a resource's membership information.

Qualifications — Honors and Awards Page

Use the Qualifications — Honors and Awards page (RS_RP_HONORS_FL) to modify a resource's honors and awards.

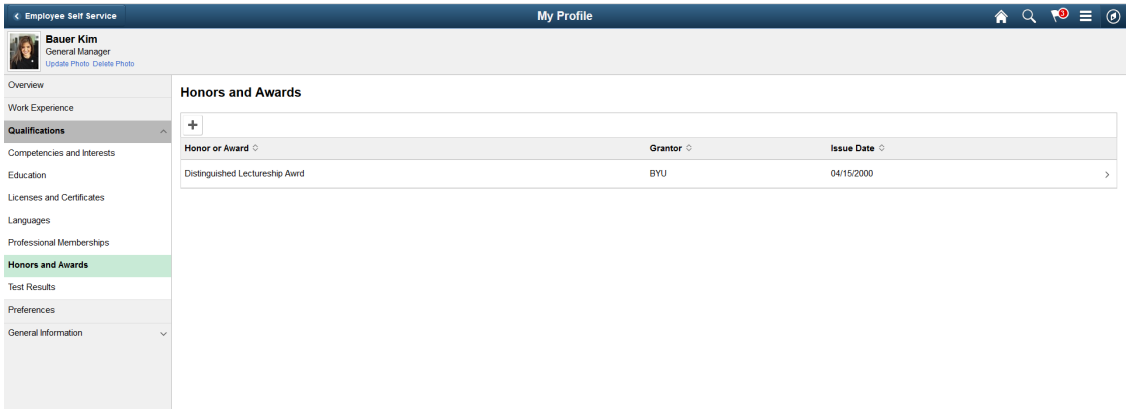
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Navigation:

Employee Self Service, and then **My Profile** .

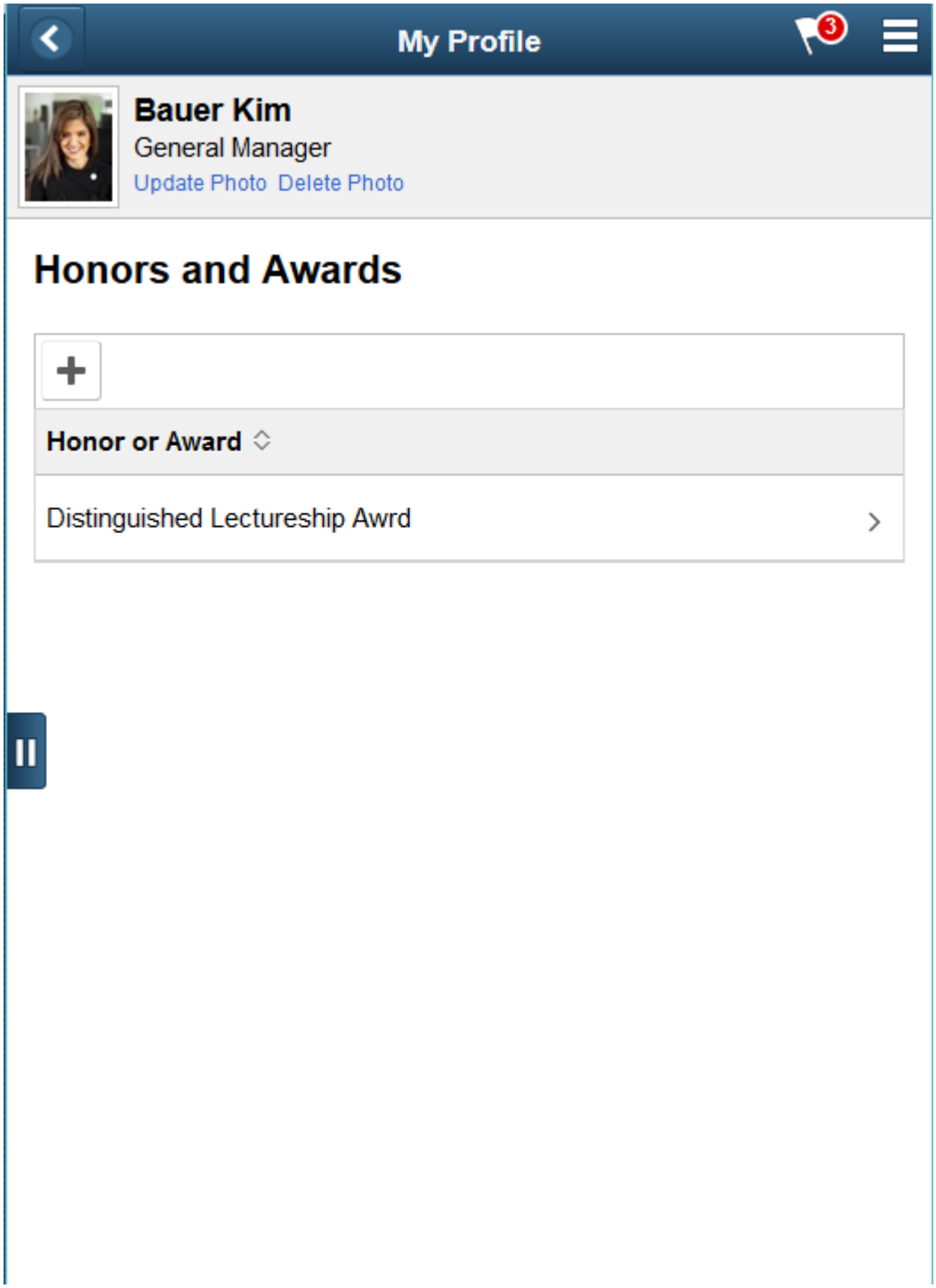
On the My Profile page, select **Qualifications** , **Honors and Awards**.

This example illustrates the fields and controls on the Qualifications - Honors and Awards page.



This example illustrates the fields and controls on the Qualifications - Honors and Awards page as displayed on a smartphone.

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When there is no data on the Honors and Awards page, a message displays that there are no honors or awards added yet. Select the **+** to add honors and awards.

Select a line in the grid to view or update a resource's honors and awards.

Qualifications — Test Results Page

Use the Qualifications — Test Results page (RS_RP_TESTS_FL) to update a resource's test results.

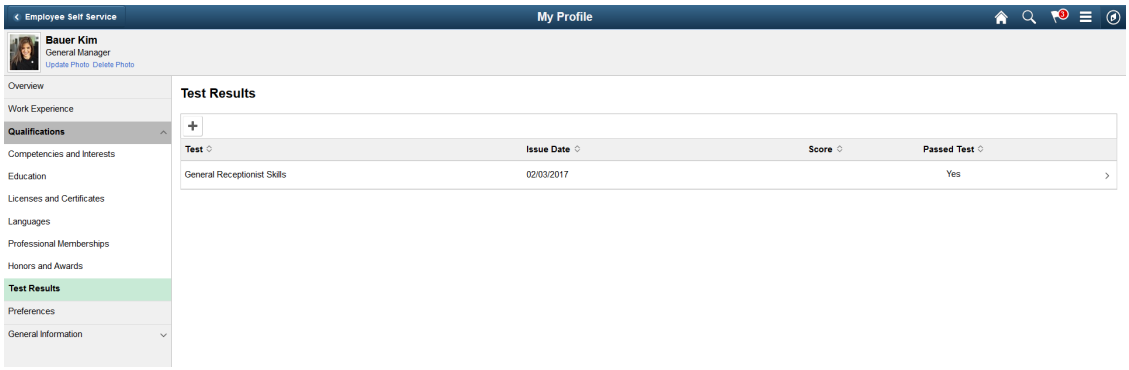
Copyright © 1988, 2026, Oracle and/or its affiliates.

Navigation:

Employee Self Service, and then **My Profile** .

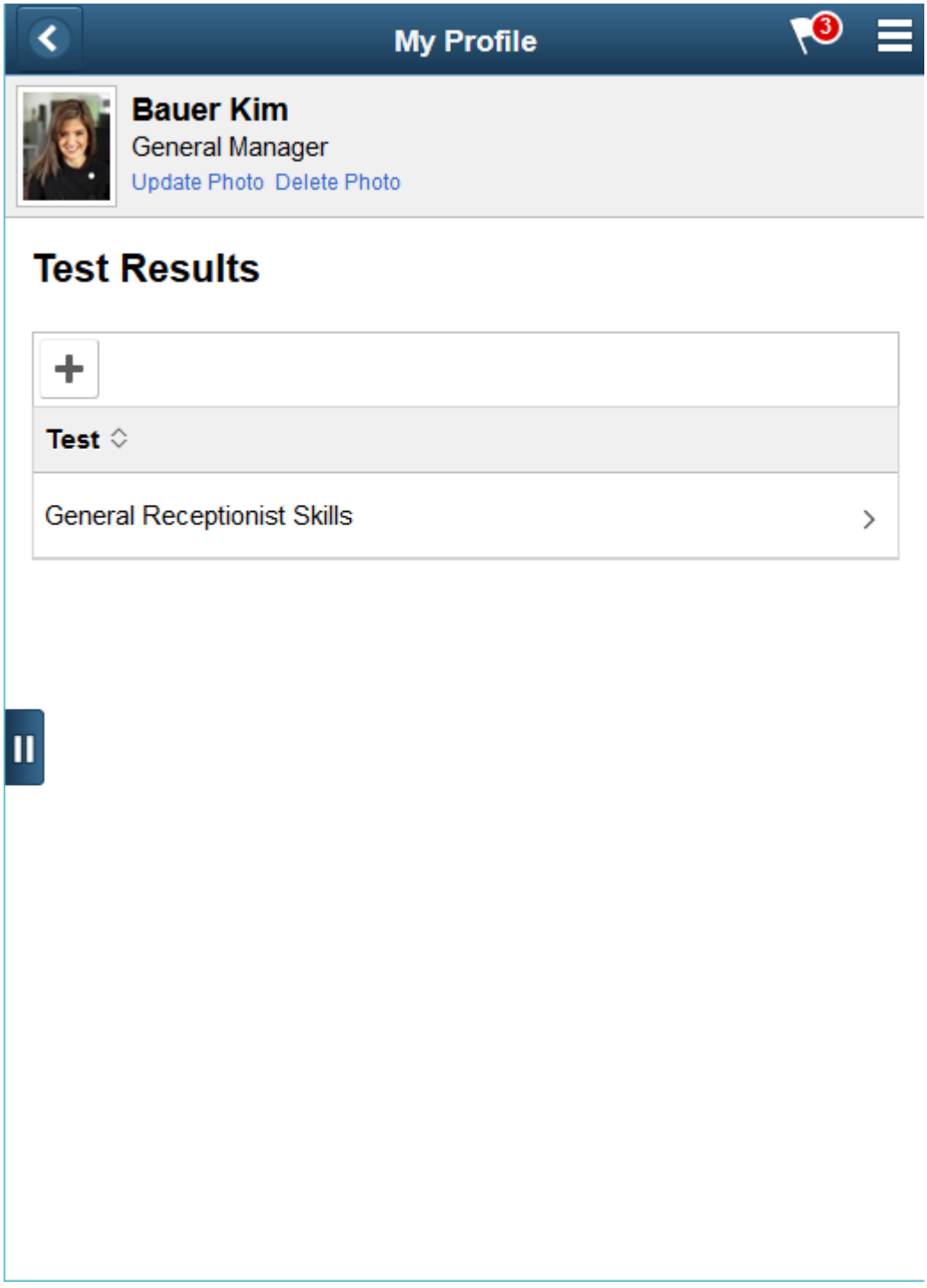
On the My Profile page, select **Qualifications** , **Test Results**

This example illustrates the fields and controls on the Qualifications — Test Results page.



This example illustrates the fields and controls on the Qualifications - Test Results page as displayed on a smartphone.

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When there is no data on the Test Results page, a message displays that there are no test results added yet. Select the **+** to add a resource's test results.

Select a line in the grid to view or update a resource's test results.

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Preferences Page

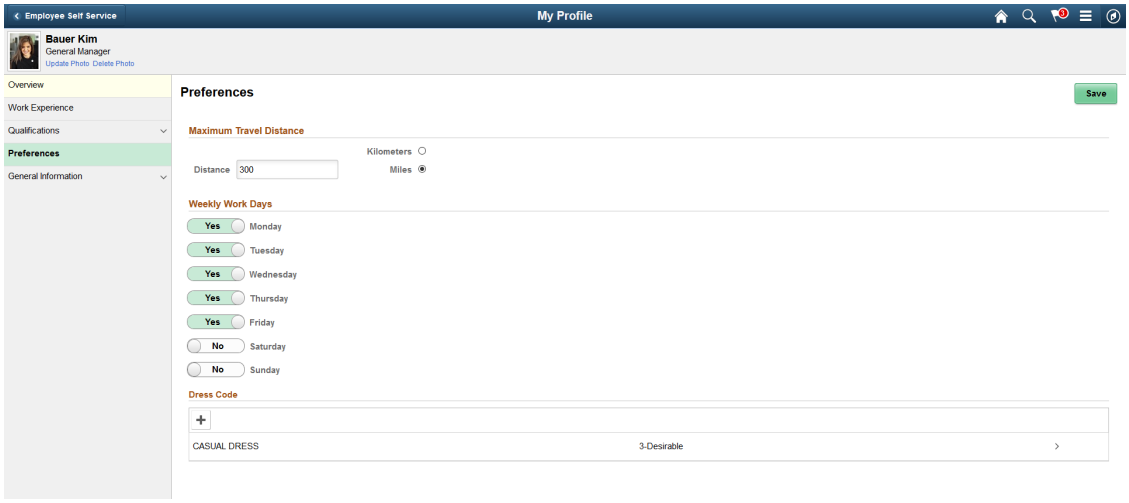
Use the Preferences page (RS_RP_PREFS_FL) to view or modify resource preference information.

Navigation:

Employee Self Service, and then **My Profile** .

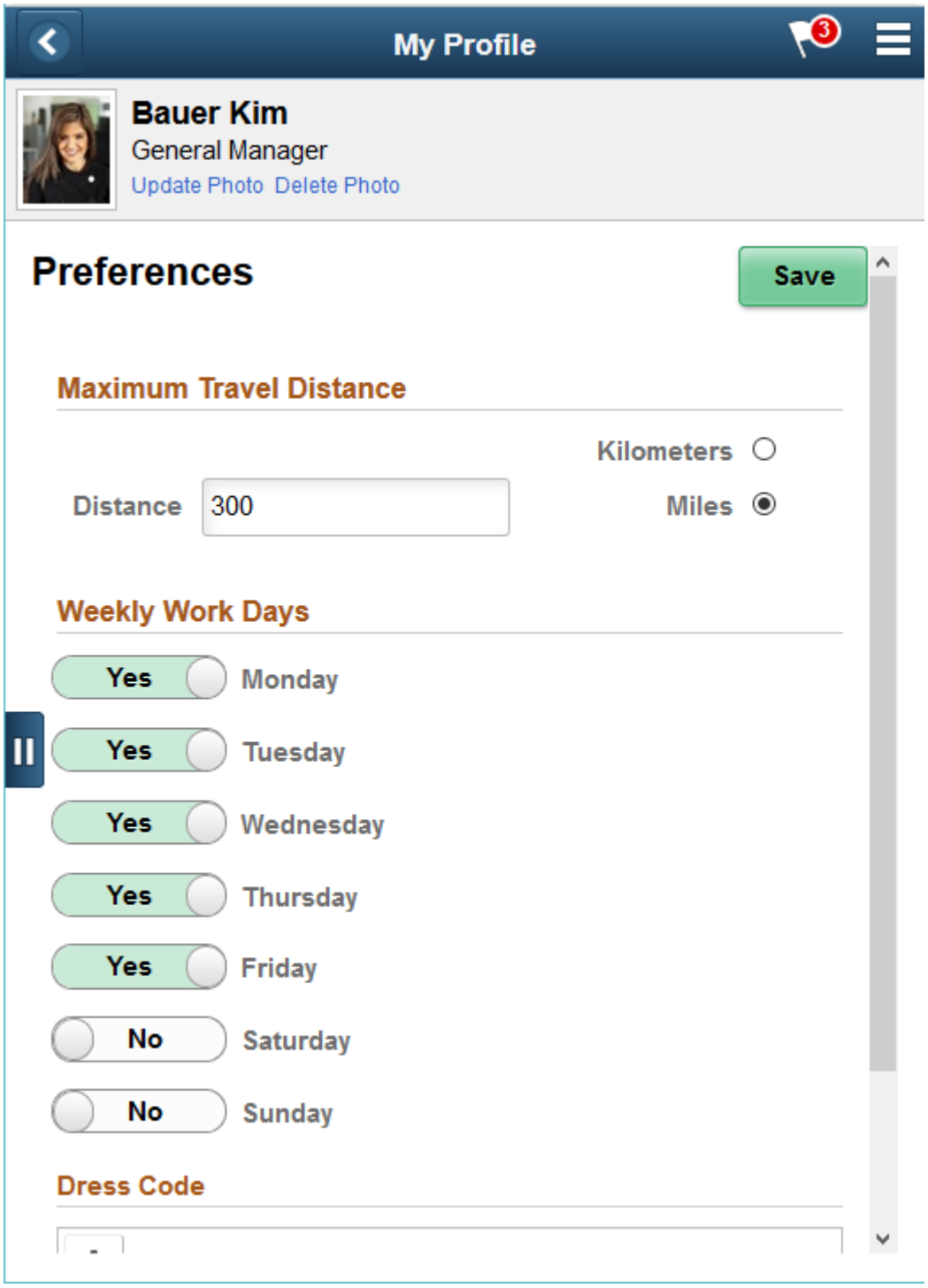
On the My Profile page, select **Preferences**

This example illustrates the fields and controls on the Preferences page.



This example illustrates the fields and controls on the Preferences.

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If your organization establishes a flexible preference attribute, it appears on this page for the resource to specify values and preference levels. For example, if there is a flexible preference attribute called Dress Code, the resource can specify a level of interest for the flexible preference attribute Dress Code.

When there is no data on the Preferences page, a message displays indicating that there are no flexible preference attributes added yet. Select the **+** button to add flexible preference attributes.

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Select a line in the grid to view or update flexible preference attributes.

General Information - Address Page

Use the General Information - Address page (RS_RP_ADDRESS_FL) to view the resource's address and personal data.

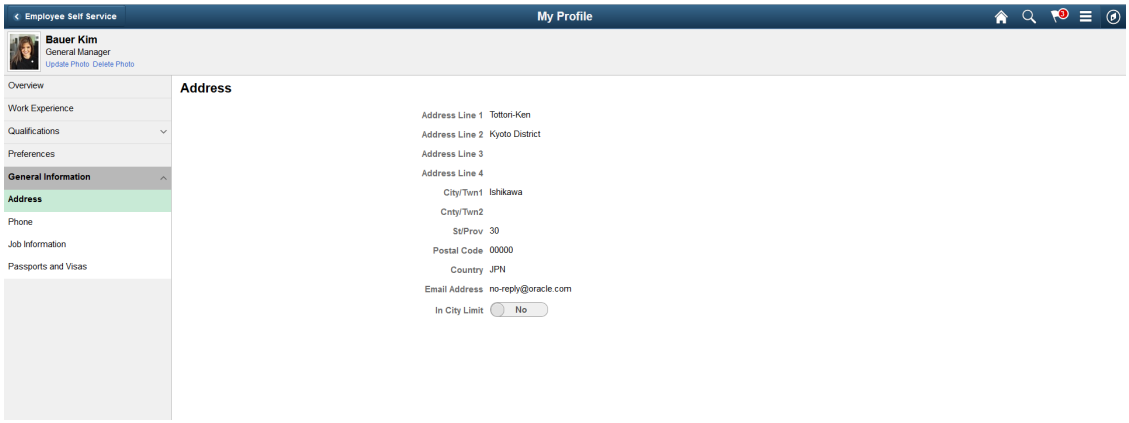
PeopleSoft Resource Management offers a flexible framework for identifying and selectively hiding sensitive employee data. Data is secured by role allowing specific user groups access to the sensitive data as appropriate. With this level of control, organizations are able to account for country-specific data privacy rules in the resource deployment process.

Navigation:

Employee Self Service, and then **My Profile** .

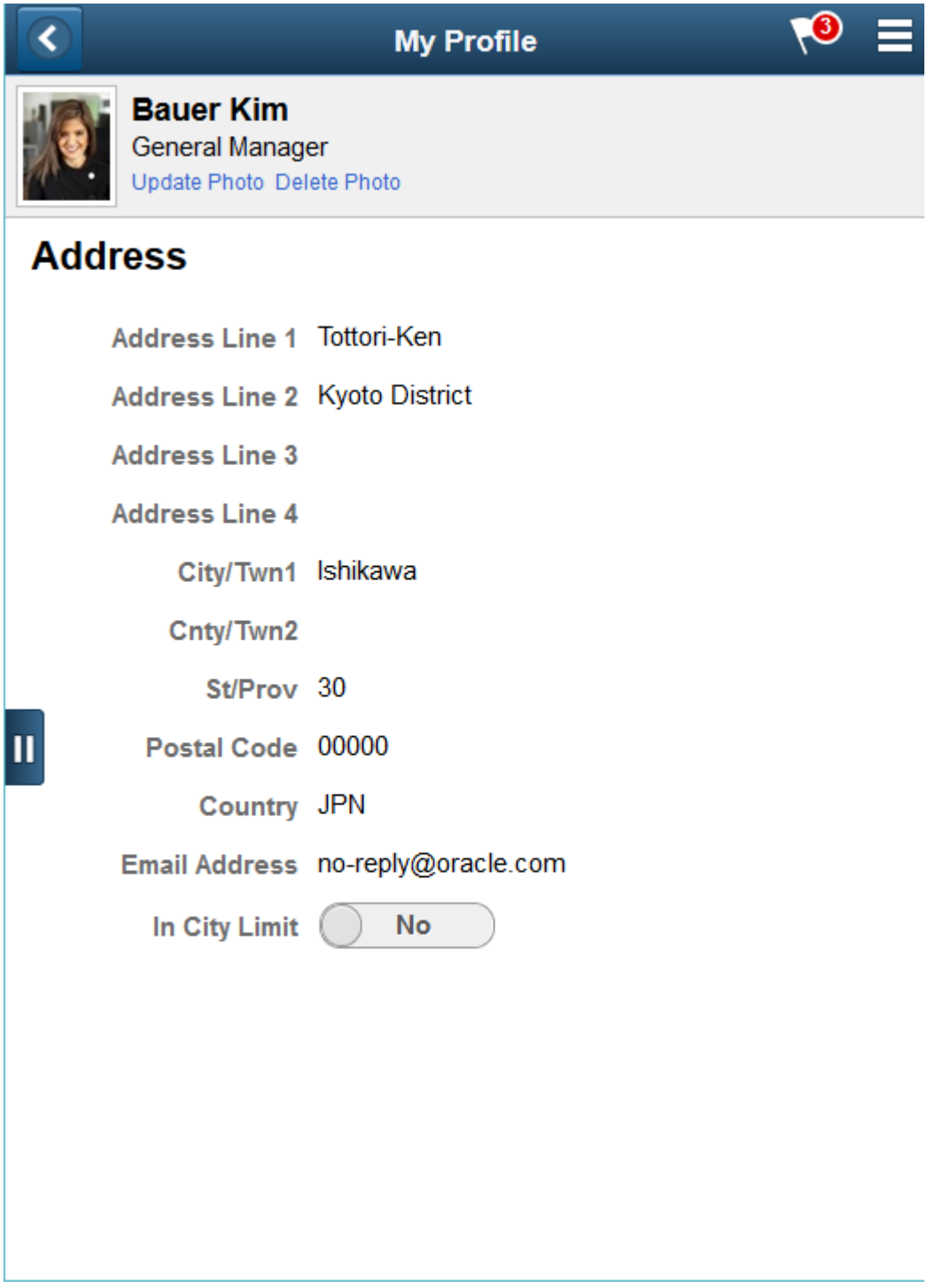
On the My Profile page, select **General Information**, **General Address**

This example illustrates the fields and controls on the General Information - Address page.



This example illustrates the fields and controls on the General Information - Address page as displayed on a smartphone.

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General Information - Phone Page

Use the General Information - Phone page (RS_RP_PHONE_FL) to view or modify a resource's contact information.

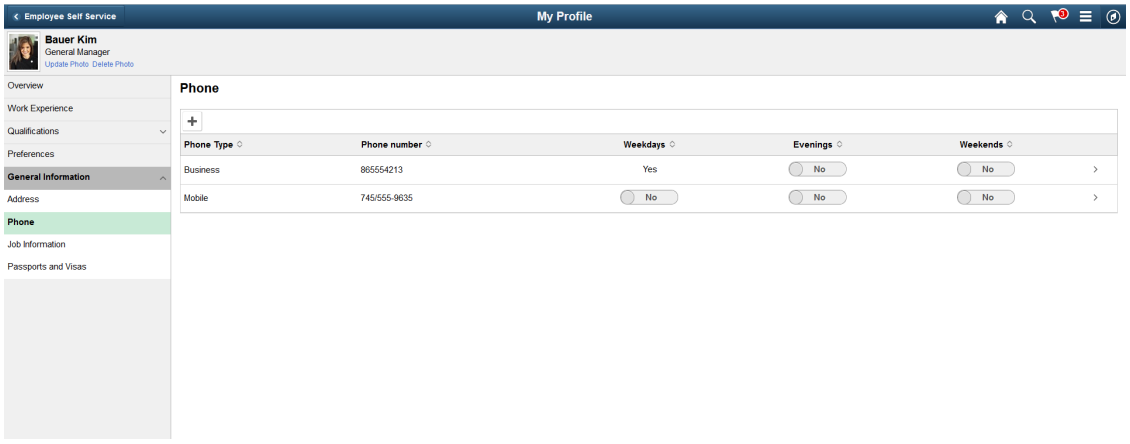
Navigation:

Employee Self Service, and then **My Profile** .

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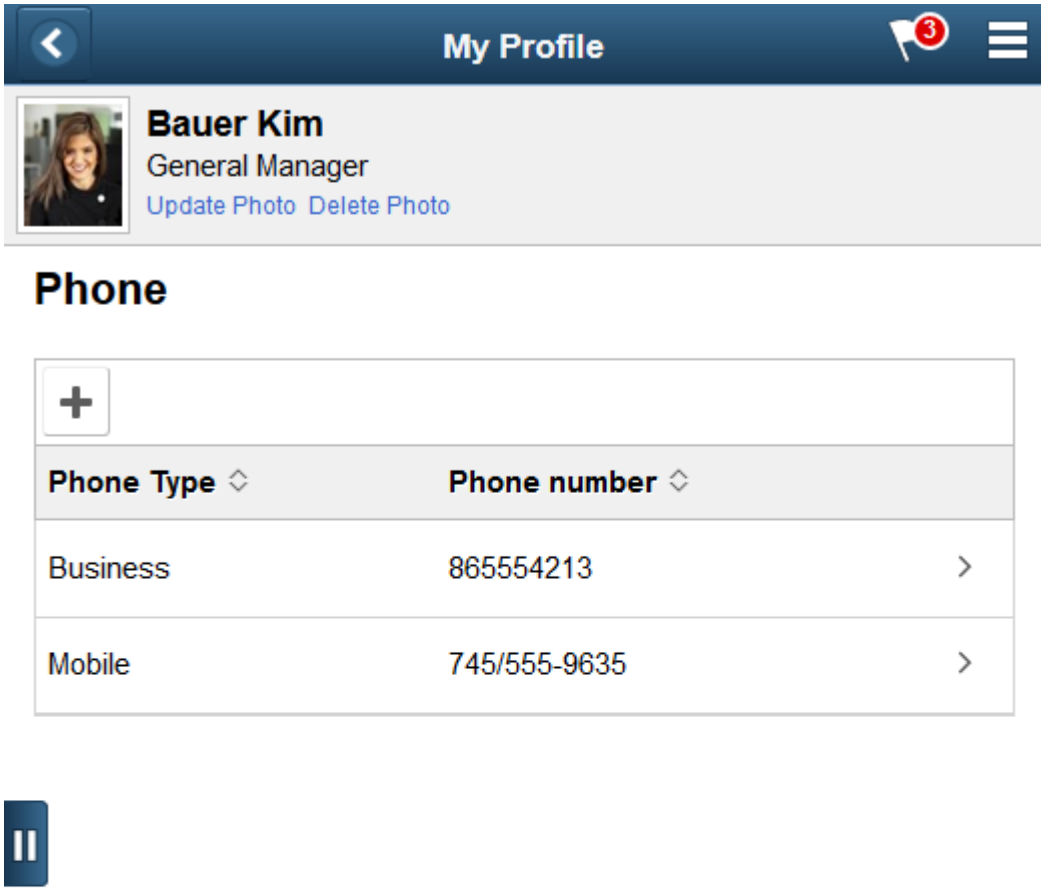
On the My Profile page, select **General Information**, **Phone**

This example illustrates the fields and controls on the General Information - Phone page.



This example illustrates the fields and controls on the General Information - Phone page as displayed on a smartphone.

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When there is no data on the General Information - Phone page, a message displays that there are no phone numbers added yet. Select the **+** button to add a resource's contact information.

Select a line in the grid to view or update a resource's contact information.

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General Information - Job Information Page

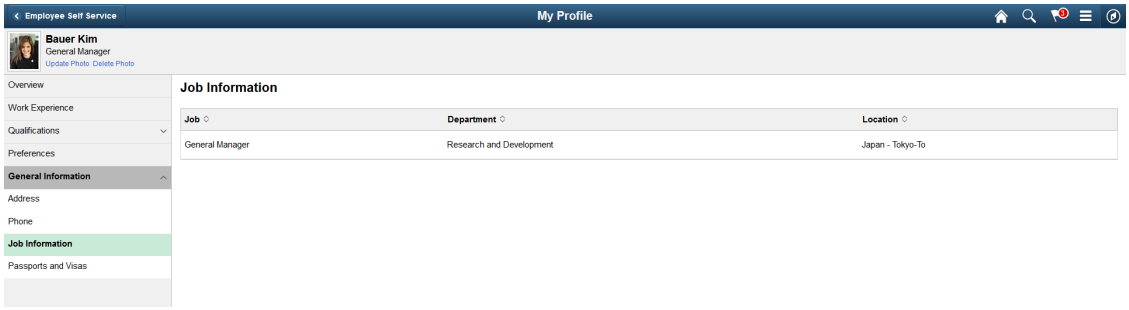
Use the General Information - Job Information page (RS_RP_JOBINFO_FL) to review the job title, department, and work location with which the resource is affiliated, as defined in the employee's Job record.

Navigation:

Employee Self Service, and then **My Profile** .

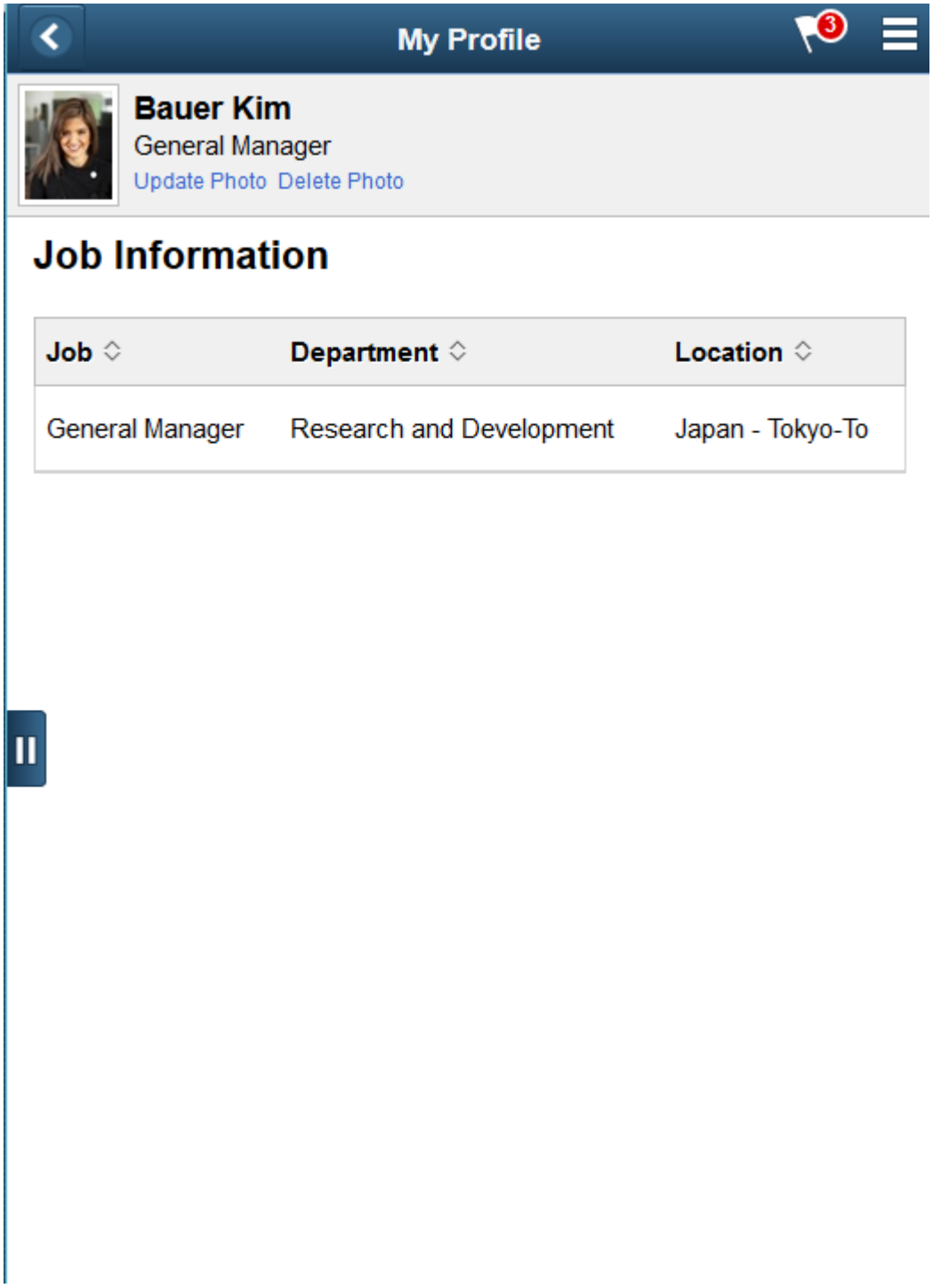
On the My Profile page, select **General Information** , **Job Information**

This example illustrates the fields and controls on the General Information - Job Information page.



This example illustrates the fields and controls on the General Information - Job Information page as displayed on a smartphone.

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You cannot modify job information on this page; you must update this information in the employee source database tables.

General Information - Passports and Visas Page

Use the General Information - Passports and Visas page (RS_RP_PASSPORT_FL) to review passports or visas held by the resource as defined in the employee source database.

Navigation:

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Employee Self Service, and then **My Profile** .

On the My Profile page, select **General Information**, **Passports and Visas**

This example illustrates the fields and controls on the General Information - Passports and Visas page.



This example illustrates the fields and controls on the General Information - Passports and Visas page as displayed on a smartphone.

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You cannot modify Passports and Visas information on this page; you must update this information in the employee source database tables.

Resource Search Page

Use the Resource Search page (RS_WRKR_SRCH_FL) to search for resources registered in the system.

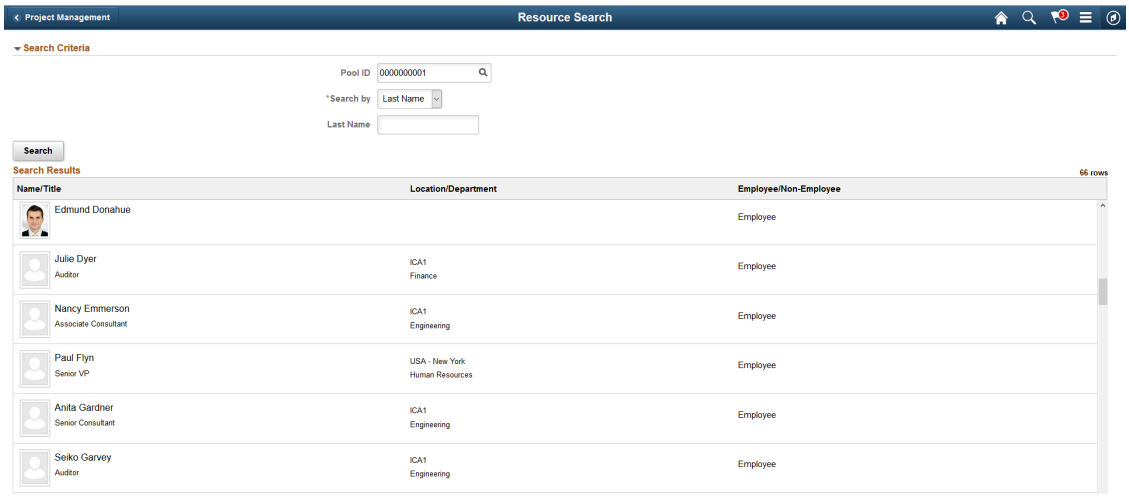
Navigation:

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Project Management, and then **Resource Profile** .

> **Note**
>
> Users with the appropriate security permission may access the Resource Search page and search for resources.

This example illustrates the fields and controls on the Resource Search page.



Enter the search criteria and then select **Search** to search for resources. The Search Results grid displays the resources meeting your search criteria. Select a resource on the Search Results grid to view the resource's profile.

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21

Maintaining Resource Schedules

Understanding Resource Schedule Maintenance

Resource schedule maintenance is an essential part of effectively managing resources in PeopleSoft Resource Management. Resource Management uses the resource schedule to interactively manage a resource's scheduled tasks and availability. Resource Matching uses schedule data to calculate the availability of a qualified resource and compare it to the dates specified on a resource request.

Resource schedules appear in a simple calendar format for use by resources, managers, staffing coordinators, and other members of the organization who need to view or update schedules. You can view the current month and year or navigate to previous or future months and years. You can also drill down to a weekly or daily view of the schedule.

During implementation on the Installation Options - Resource Management page, you can specify which non-assignment task categories trigger a notification message to the resource and the resource manager if a manager with authority to modify resource schedules changes a task in the specified category in the resource schedule. You can also specify which non-assignment task categories trigger a notification message to the resource manager if a resource changes a task in the specified category.

This section lists prerequisites and discusses:

- Task categories.
- Assignments and appointments.
- Holidays.
- Notification messages.

Prerequisites

Before you work with resource schedules, you must:

- Define resource schedule options.

  See Application Fundamentals: Defining Resource Management Installation Options.

- Define task categories.

  See Defining Task Categories and Mapping to TRCs.

- Define holidays.

  See Defining Holidays on Resource Schedules.

- Establish eligible resources.

  See Understanding Resources.

- If you use PeopleSoft Resource Management without Program Management, determine if you want to prevent the system from scheduling assignments on days that have a scheduled holiday.

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Before you can prevent the system from scheduling assignments on scheduled holidays, you must:

- Select the **Do not schedule assignments on Holidays** option on the Installation Options - Resource Management page.
- Specify a holiday schedule for each resource in the PeopleSoft Resource Management system.
- Run the Holiday Load Application Engine process (RS_HOLIDAY) to enter the latest holidays on resource calendars.

Task Categories

Every entry in a resource schedule is associated with a task category. Task categories are used in Resource Matching and in PeopleSoft Resource Management reports. Most of the task categories are predefined in Resource Management; however, an organization can define additional task categories that are specific to its business needs.

The task categories are:

- *Billable External:* Select to designate a billable, external (customer) assignment for the resource.
- *Billable Internal:* Select to designate a billable, internal (company or agency) assignment for the resource.
- *Corporate Event:* Select to schedule the resource to attend a company or agency event.
- *Education-College/Univ:* Select to schedule the resource to participate in educational course work.
- *Scheduled Holiday:* Designates organization holidays that are defined in the Holiday Date record (HOLIDAY_DATE).

  The Holiday Load process assigns this task category to holidays that it loads into resource calendars. You can also assign this task category when you create appointments manually.
- *Company Holiday:* Select to designate holidays that are not defined in the Holiday Date record.

  This task category is not used by the Holiday Load process, and is not recognized as a scheduled holiday during assignment creation.
- *Planned Leave:* Select to schedule a resource's planned leave.
- *Meeting:* Select to schedule the resource to attend a meeting.
- *Non-billable External:* Select to designate a non-billable, external (customer) assignment for the resource.
- *Non-billable Internal:* Select to designate a non-billable, internal (company or agency) assignment for the resource.
- *Personal Time Off:* Select to schedule a resource for personal time off.
- *Corporate Training:* Select to schedule the resource to train for an assignment.
- *Vacation:* Select to schedule a resource's vacation.

You can define additional task categories during PeopleSoft Resource Management implementation.

Each task category has a basic flexibility percentage that indicates the degree to which the task is a firm commitment or can be rescheduled. Assignment task categories also have a reserved status flexibility percentage that overrides the basic flexibility percentage if the task

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has the status *Reserved.* The Resource Matching feature evaluates the flexibility of the task category that is associated with appointments or assignments on a resource schedule when determining resource availability.

Task category codes, descriptions, and flexibility percentages are discussed in more detail in the topic on enabling resource schedules.

Related Topics

- Task Categories
  In PeopleSoft Financials, a task is the equivalent of a schedule entry, such as an appointment or assignment. Resource tasks are managed with a set of predefined task categories that are delivered with PeopleSoft Resource Management, and user-definable categories that are available for tasks that are specific to the organization. There are two main types of task categories: assignment task categories, such as billable external and non-billable internal, and appointment task categories, such as meeting and holiday.

Assignments and Appointments

Resource schedule entries are classified as appointments or assignments, which have the following characteristics:

- *Appointments* consist of meetings, corporate events, training and education, and any scheduled time away from work.

  You can enter appointments into a resource schedule manually.

- *Assignments* consist of work that employees perform at a billable or non-billable rate for internal or external customers.

  You add assignments to resource schedules by running the PeopleSoft Resource Management assignment processes.

Holidays

An organization defines its holidays in the employee source database. You can establish a single holiday calendar for the organization or different holiday calendars for each country. If changes are made to a holiday calendar that is associated with a resource, the changes are automatically applied to the resource's schedule when you run the Holiday Load Application Engine process (RS_HOLIDAY) from the Load Holidays page. Additionally, resources can refresh holidays on their schedules by initiating the Holiday Load process directly from the monthly schedule.

Notification Messages

During PeopleSoft Resource Management implementation, you can set up workflow to trigger notifications when certain changes are made to the resource schedule. The workflow is triggered based on the task category of a new or modified appointment and the role of the user who makes the change. When schedule workflow is activated for a task category, any new appointments or changes to existing appointments in that task category automatically trigger a notification message to the resource or resource manager.

Working with Resource Schedules

The resource schedules that you can view or modify are based on your user role. When you navigate to the Maintain Schedules folder and select the My Monthly Schedule link, the schedule that appears is associated with your user login. If you have access to other resource

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schedules, you can select the Monthly Schedules link in the Maintain Schedules folder and select a resource schedule to view or modify.

This topic discusses how to working with Resource Schedules.

Pages Used to Work with Resource Schedules

Page Name	Definition Name	Usage
Monthly Schedule - Resource Search Page	RS_SCHED_MONTHSRCH	Search for resource schedules to view, based on the security access of your user role.
Monthly Schedule Page	RS_SCHED_MONTH	View and modify your monthly schedule or the monthly schedule of other resources, based on the security access of your user role. Viewing or Modifying Resource Schedules
Daily Schedule Page	RS_SCHED_DAILY	View the resource's daily schedule in half-hourly increments. Viewing or Modifying Resource Schedules
Weekly Schedule Page	RS_SCHED_WEEKWIDE	View the resource's weekly schedule. Viewing or Modifying Resource Schedules

Viewing or Modifying Resource Schedules

This section discusses how to view or modify a resource's appointments or assignments from the:

- Monthly schedule
- Daily schedule
- Weekly schedule

Monthly Schedule

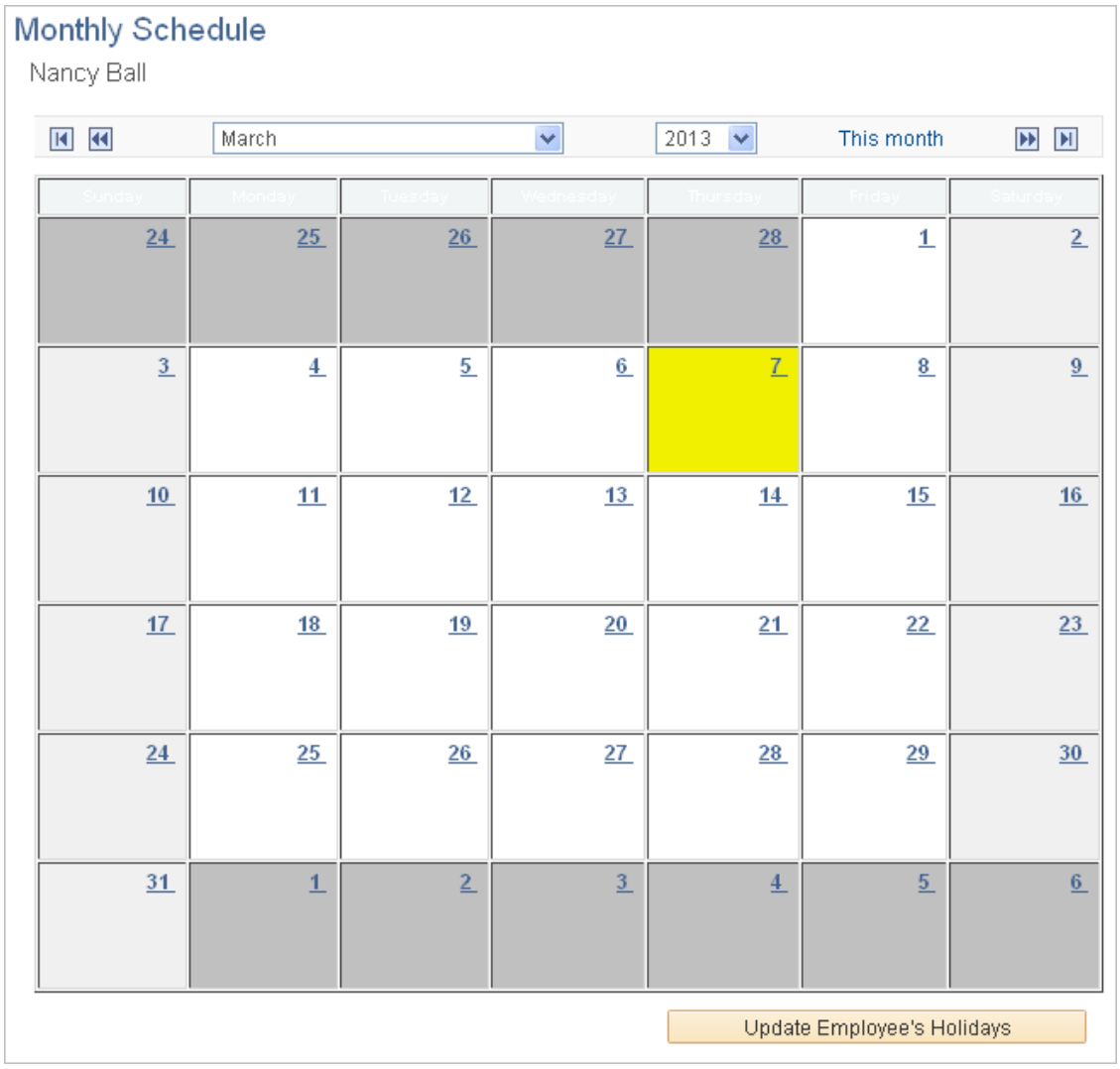
Use the Monthly Schedule page (RS_SCHED_MONTH) to view and modify your monthly schedule or the monthly schedule of other resources, based on the security access of your user role.

Navigation:

- **Resource Management**, and then **Maintain Schedules**, and then **Monthly Schedules or My Monthly Schedule**, and then **Monthly Schedule**
- Click **View Monthly Schedule** on the Assign Resource page.
- Click the **View monthly calendar** icon for a resource in the **Search Results** or **Considering** grid on the Express Search page (RS_EXPRESS_SEARCH).
- Click the **Monthly Calendar** icon for a resource on the Staffing Workbench.

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This example illustrates the fields and controls on the Monthly Schedule page.



To manage schedules using the Monthly Schedule page:

- Click the arrow indicators to navigate to the next or previous month or year.
- Select a specific month and year to jump to a different period.
- If there are no schedule entries for a day, click the date link to access the Appointment Details page and create a new appointment.
- If there are schedule entries for a day, click the date link to access the Daily Schedule page.
- Click an assignment description link to access the Assign Resource page and view details about the assignment.
- Click an appointment description link to access the Appointment Details page and view details about the appointment.

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> **Note**
>
> An appointment description that is not a link indicates that a task cannot be modified. For example, holidays that are loaded by the Holiday Load process cannot be modified from the resource schedule.

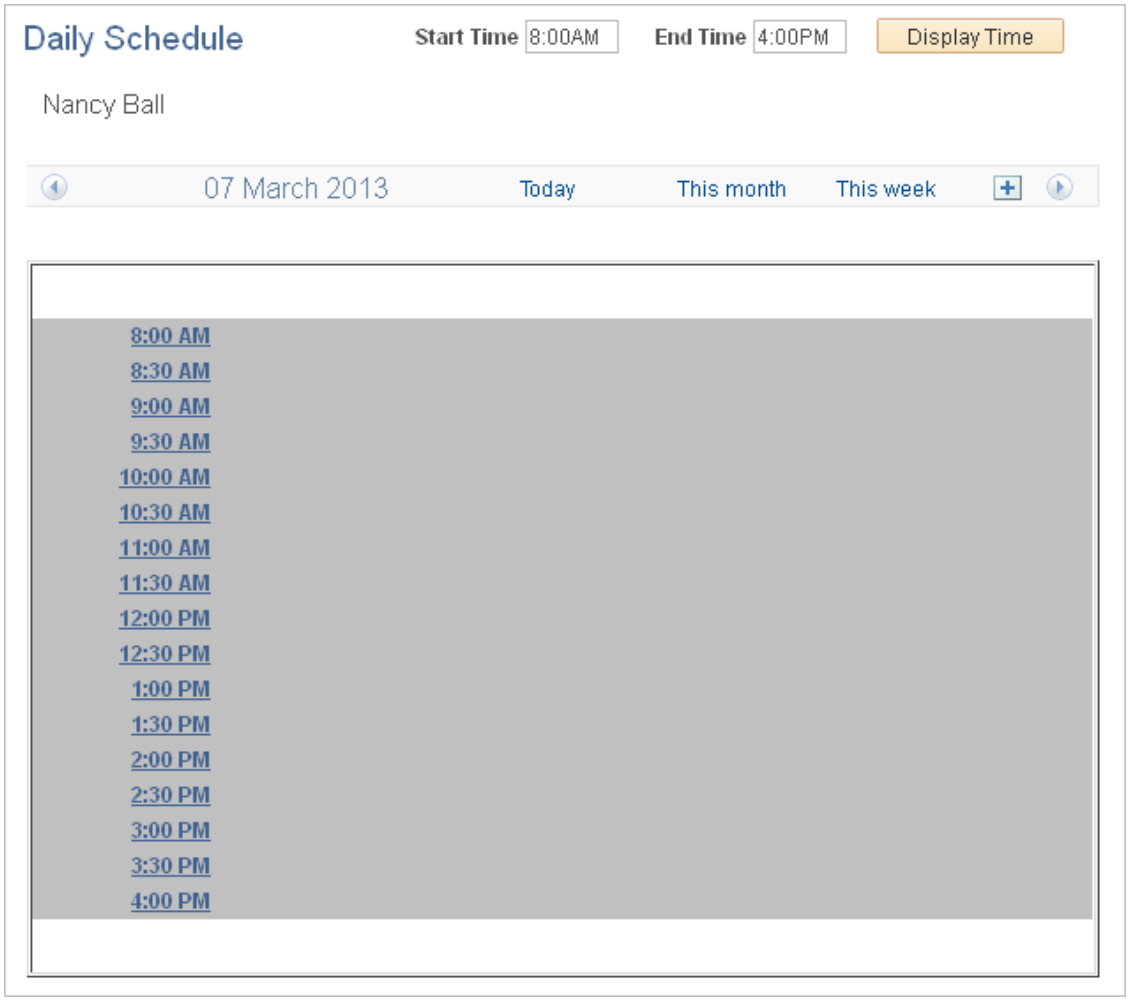
Daily Schedule

Use the Daily Schedule page (RS_SCHED_DAILY) to view the resource's daily schedule in half-hourly increments.

Navigation:

Click the numeric day of the month link on the Monthly Schedule page if an appointment or assignment occurs on that day. (If there are no schedule entries on that day, the day of the month link accesses the Appointment Details page.)

This example illustrates the fields and controls on the Daily Schedule page.



The daily schedule provides a quick overview of tasks for a given day in half-hourly increments. Tasks include a description of the actual task start time, end time, and activity

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information. Multiple tasks within the half hour appear in order of start time. Highlighting indicates when a task overlaps with another task in a given time period.

Enter new start and end times, and click **Display Time,** to change the timeline that appears on the daily schedule.

The Daily Schedule page functions much like the other schedule pages:

- Use the arrow indicators to scroll to the next or previous day.
- Click the time link to access the Appointment Details page to create a new appointment.
- Click an appointment or assignment description link to view details about the entry on the Appointment Details page or the Assign Resource page.

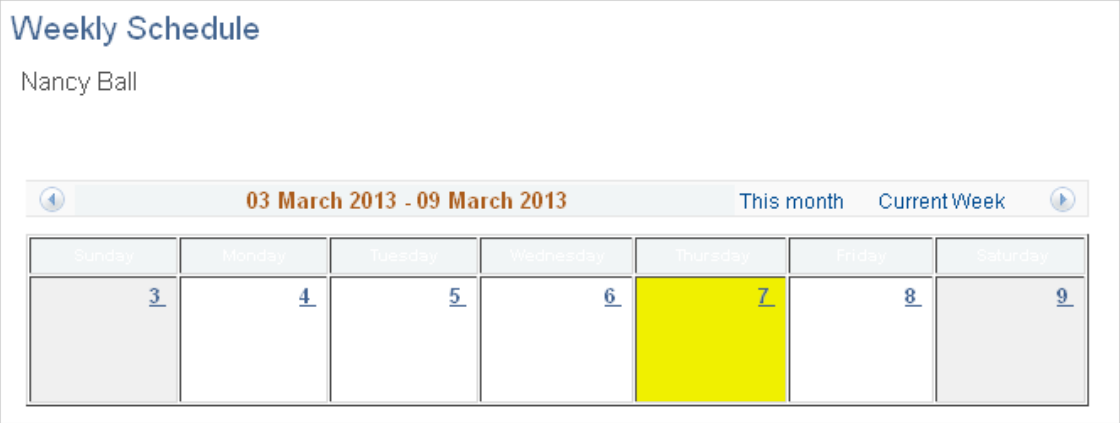
Weekly Schedule

Use the Weekly Schedule page (RS_SCHED_WEEKWIDE) to view the resource's weekly schedule.

Navigation:

Click the **This week** link on the Daily Schedule page.

This example illustrates the fields and controls on the Weekly Schedule page.



The Weekly Schedule page functions much like the other schedule pages:

- Use the arrow indicators to navigate to the next or previous week.
- If there are no entries on a day, click the date link to access the Appointment Details page to create a new appointment.
- If there are entries on a day, click the date link to access the Daily Schedule page.
- Click an appointment or assignment description link to view details about the entry on the Appointment Details page or the Assign Resource page.

Monthly Schedule - Resource Search Page

Use the Monthly Schedule - Resource Search page (RS_SCHED_MONTHSRCH) to search for resource schedules to view, based on the security access of your user role.

Navigation:

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Resource Management, and then **Maintain Schedules**, and then **Monthly Schedules**, and then **Monthly Schedule - Resource Search**

Field or Control	Description
Update Employee's Holidays	Click to initiate the Holiday Load process to refresh holidays on the resource schedule. All of the holidays that are associated with the holiday schedule are inserted into the resource schedule as tasks with the task category *SCHEDULED_HOLIDAY.* A message indicates when the process is complete. Use this button when a resource accepts a future-dated job change that changes the resource's holiday schedule.

Scheduling Appointments

This topic discusses how to schedule appointments.

Pages Used to Schedule Appointments

Page Name	Definition Name	Usage
Appointment Details Page	RS_SCHED_APPT	Add, view, or modify an appointment.
Notification Message Page	RS_SCHED_WFNOTIFY	Send an email notification to the resource or resource manager if a schedule changes.
Assign Resource Page	RS_ASSIGN_MAIN	View or modify assignment details.

Appointment Details Page

Use the Appointment Details page (RS_SCHED_APPT) to add, view, or modify an appointment.

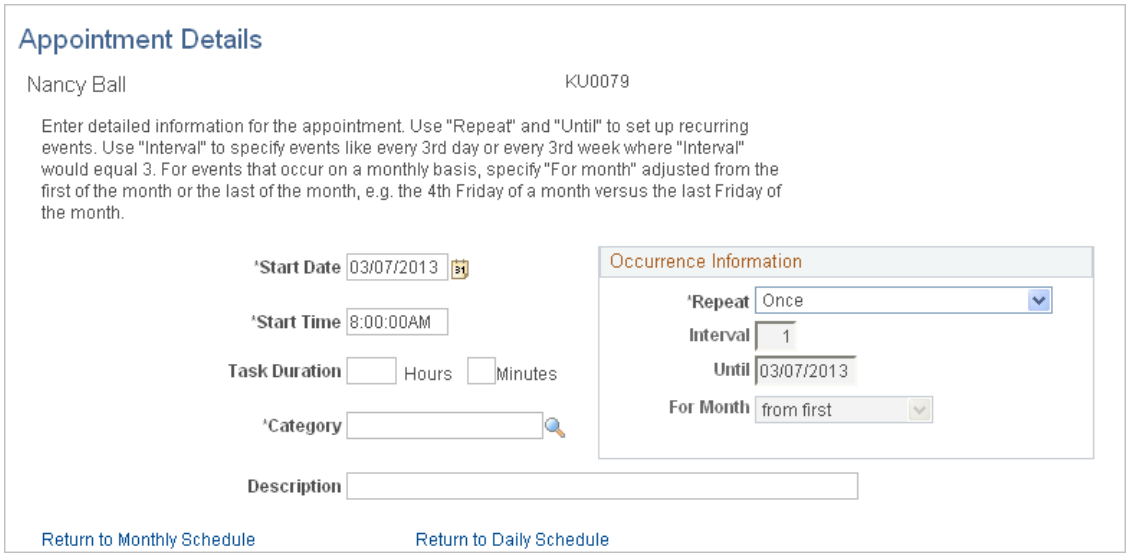
Navigation:

- **Resource Management**, and then **Maintain Schedules**, and then **Monthly Schedules or My Monthly Schedule**, and then **Monthly Schedule**

  Click a numeric date link on the Monthly Schedule page.
- Click a numeric date link on the Weekly Schedule page.
- Click a time link on the Daily Schedule page.
- Click an appointment description link on the Monthly Schedule, Weekly Schedule, or Daily Schedule page.

This example illustrates the fields and controls on the Appointment Details page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Start Date	Enter the appointment start date for a new appointment. The default start date is based on the numeric date link that you clicked on the resource schedule to access the Appointment Details page.
Start Time	Enter the time of day when the appointment starts. For a new appointment, the default value is the standard start time that is specified during implementation, except when you create an appointment from the Daily Schedule page. In that case, the start time is based on the time link that you selected on the Daily Schedule page.
Task Duration	Enter the number of **Hours** and **Minutes** per day that the resource spends on the appointment.
Category	Enter the appointment task category.

Occurrence Information

Create entries for a recurring appointment in the **Occurrence Information** group box.

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Field or Control	Description
Repeat	Enter the appointment frequency. Options are: *Daily:* Select for events that recur every workday. *Monthly by Date:* Select for events that recur every month on the same date of the month. *Monthly by Day:* Select for events that recur every month on the same day of the month, such as the second Tuesday of each month. You must also select a value in the **Repeat for Month** field. *Once:* Select for events that only occur at the day, date, and time entered. This is the default value. *Weekly:* Select for events that recur every week on the same day of the week. *Yearly:* Select for events that recur every year at the same month, date, and time.
Interval	Enter the appointment frequency interval. For example, enter an interval of *3* with a repeat value of *Weekly* to schedule the appointment every third week.
Until	Enter the final date of the recurring appointment.
For Month	Enter a value if the event repeats monthly by day. Options are: *from first:* Select to have the system count forward from the first day of the month to schedule the recurring event. For example, an appointment that starts on Thursday, January 1, and repeats monthly by day until December 31 is scheduled on the first Thursday of every month from January through December. *from last:* Select to have the system count back from the last day of the month to schedule the recurring event. For example, an appointment that starts on Friday, January 30, and repeats monthly by day until December 31 is scheduled on the last Friday of every month from January through December. This field is available only if the repeat value is *Monthly by Day.*

Appointment Conflicts

Access the Daily Schedule page (click the numeric day of the month link on the Monthly Schedule page if an appointment or assignment occurs on that day).

Conflicting events are highlighted on the Daily Schedule page.

Notification Message Page

Use the Notification Message page (RS_SCHED_WFNOTIFY) to send an email notification to the resource or resource manager if a schedule changes.

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Navigation:

Click **Save** on the Appointment Details page.

If email notification options are active, the Notification Message page appears when you save a new or modified appointment.

During implementation on the Installation Options - Resource Management page, you can select the option to send the message to the resource, resource manager, or both. You also select the tasks that, when changed by the resource, the resource manager, or the staffing manager, trigger the workflow. You must select the **Calendar Email Notification** option on the Installation Options - Resource Management page to activate schedule change notification.

Field or Control	Description
Note	Enter additional comments to explain the change.
OK	Click to commit the appointment to the schedule and send the notification message to the indicated recipients. **Note:** The **E-Mail To** field appears blank on the Notification Message page if there are no email addresses established for the user IDs that are associated with the recipients. When you click **OK** on the Notification Message page, a warning appears indicating that no email message was sent because no recipients are defined on the message. The appointment is committed to the schedule. Click **OK** to close the warning message.
Cancel	Click to cancel the message, discard the save attempt, and return to the Appointment Details page. **Note:** When workflow is activated, the appointment will not save until you click **OK** on the notification message.

Assign Resource Page

Use the Assign Resource page (RS_ASSIGN_MAIN) to view or modify assignment details.

Navigation:

Click an assignment description link in the Resource Monthly Schedule (RS_SCHED_MONTH) or My Resource Monthly Schedule (RS_SCHED_MYMONTH) component.

The Assign Resource page appears when you click an assignment description link from the monthly, daily, or weekly resource schedule.

Related Topics

- Understanding Resource Assignments in PeopleSoft Resource Management
  The assignment process pairs a resource with a unit of work. Assignments interact with the other key data components—resource profiles, resource schedules, and service orders—that support the staffing process. When you create an assignment and process it through various states, PeopleSoft Resource Management creates a new resource schedule entry or updates an existing entry. When you assign a resource to a project or a resource completes the assignment, PeopleSoft Resource Management updates the resource profile with work experience information. When you select a resource to fulfill a resource

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request on a service order, an assignment is created and can be viewed from the service order to reflect service order fulfillment progress. Once the number of resources assigned equals the quantity of resources requested for an order, the service order is closed.

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Assigning Resources

Understanding Resource Assignments in PeopleSoft Resource Management

The assignment process pairs a resource with a unit of work. Assignments interact with the other key data components—resource profiles, resource schedules, and service orders—that support the staffing process. When you create an assignment and process it through various states, PeopleSoft Resource Management creates a new resource schedule entry or updates an existing entry. When you assign a resource to a project or a resource completes the assignment, PeopleSoft Resource Management updates the resource profile with work experience information. When you select a resource to fulfill a resource request on a service order, an assignment is created and can be viewed from the service order to reflect service order fulfillment progress. Once the number of resources assigned equals the quantity of resources requested for an order, the service order is closed.

You can view or update assignments based on your user role from the folder navigation, the Staffing Workbench component, or the My Assignments component.

This section lists prerequisites and discusses:

- Assignment processes.
- Assignment statuses.
- Assignment dates.
- Assignment workflow.

Related Topics

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

Prerequisites

Before creating assignments, you must establish assignment approval and email notification options.

Related Topics

- Resource Management Options Page
  Use the Resource Management Options page (RS_BUS_UNIT_OPT) to specify the PeopleSoft Resource Management business unit options for service order workflow, assignment approval, and generic resource approval.

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Assignment Processes

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

- Create a direct assignment when you already know the appropriate resource to fulfill a requirement and you do not need to track the requirement on a service order.
- Use the Express Search feature to find available resources who closely match a specified list of competencies and accomplishments, and create an assignment for the most qualified resource.
- Initiate a service order to track one or more resource requests—each with a unique set of qualification requirements—for the same project, and create assignments as part of the service order fulfillment process on the Staffing Workbench.
- In the PeopleSoft Program Management system, select a resource for a project and create an assignment.
- Initiate a generic resource request for a project, and create assignments for the request.

PeopleSoft Program Management, if installed, should be the primary system used to manage assignments and resources. PeopleSoft Program Management uses a project calendar that accounts for holidays when calculating duration and work effort. Because of this, the resource assignment schedule should accurately reflect the project calendar.

Assignment Statuses

The assignment status controls much of the workflow within PeopleSoft Resource Management business processes. It determines whether a service order is fulfilled and whether tasks are created on resource schedules, and it can trigger additional workflow approvals and email notifications.

Actions Triggered by Assignment Statuses

As an assignment moves through various stages and its status is updated, it triggers certain events in other areas of the application. Assignment statuses determine the resource fulfillment progress of resource requests and service orders in PeopleSoft Resource Management, and project resource lists in PeopleSoft Program Management. Statuses also determine which assignments appear on resource schedules and in the work history section of resource profiles.

This table describes assignment status values and lists the actions that each value triggers:

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Assignment Status	Description	Triggers These Actions
Assign	The resource's assignment is confirmed. To change the status to *Assign* you can: • Select the *Assign* status on the Assign Resource page. • Select the *Assign* action on the Staffing Workbench. • In the PeopleSoft Program Management system, select the *Requested* resource status on the Resources page. **Note:** If approval workflow is required, the *Assign* status value changes to *Pending Approval* until the assignment has completed the approval workflow. In the PeopleSoft Program Management system, choose *Requested* and save the page to trigger assignment approval workflow. If approval workflow is not enabled , the resource status changes to *Committed* upon saving the page.	This status updates the resource schedule and resource profile in the PeopleSoft Resource Management system, and the project resource list in the PeopleSoft Program Management system. If the assignment fulfills the quantity on the resource request, the resource request is closed and other assignments that are attached to this resource request that are not in a status of *Assign* are canceled.
Cancel	The assignment is canceled. To change the status to *Cancel* you can: • Select the *Cancel* status on the Assign Resource page. • Select the *Cancel* action on the Staffing Workbench. • In the PeopleSoft Program Management system, select the *Cancelled* resource status on the Resources page. Alternatively, the system can change the status automatically during workflow processing as follows: • If you fulfill the quantity required on a resource request, the outstanding assignments for the resource request that are not yet *Assigned* are automatically canceled. • If you close a resource request, the outstanding assignments for the resource request that are not yet *Assigned* are automatically canceled.	An assignment status of *Cancel* triggers this actions: If you cancel an assignment on the Assign resource page, the system will display a message stating that all calendar entries of the resource for this assignment will be removed. After saving the canceled assignment, the assignment end date will be changed to the assignment start date. Canceling an assignment does not remove the resource from the project resource list in PeopleSoft Program Management or the project team in PeopleSoft Project Costing. **Note:** If no assignments exist in a status of *Assigned* on a service order and the service order is canceled, all of the resource requests on the service order are automatically canceled and the service order is no longer editable.

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Assignment Status	Description	Triggers These Actions
Complete	The work assignment is complete. To change the status to *Complete* you can: • Select the *Complete* status on the Assign Resource page. • Select the *Complete* action on the Staffing Workbench. • In the PeopleSoft Program Management system, select *Complete* from the Resource Status drop-down list box on the Resources page.	If you complete an assignment on the Assign Resource page, the Assign Resource - Assignment Status page appears for you to enter an effective date. These actions occur: • If the completion effective date is before the assignment end date, the system updates the resource schedule, resource profile work history, and project. Calendar entries after the effective date of the completion are deleted. • If the completion effective date is after the assignment end date, the system updates only the resource profile work history. These actions occur if you complete an assignment from the Resources page in the PeopleSoft Program Management system: • If the user changes the Resource Status to *Complete* for an assignment that is in process, the assignment status changes to *Complete*. • If transactions exist for the resource on the project, the assignment status changes to *Complete*. • If the effective date entered on the Assignment Status page is before the assignment start date, an error message will be displayed stating that the effective date is not valid.
Interview	The resource is interviewing for the assignment. You can change the status to *Interview* on the Assign Resource page or the Staffing Workbench.	An assignment in this status appears on the resource request, but does not change the request status.

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Assignment Status	Description	Triggers These Actions
Pending Approval	The assignment was submitted to the resource's manager and is awaiting approval. If a user selects an assignment status of *Assign* and approval workflow is required, the assignment is automatically placed in a status of *Pending Approval* until the manager approves or rejects it. In the PeopleSoft Program Management system, on the Resources page, the Resource Status will be *Requested* if approval workflow is required.	This status triggers approval workflow, if enabled. This status updates the resource schedule and appears on the resource request, but does not change the request status. If the requested quantity on the resource request is one and there is an assignment against it in a *Pending Approval* status, the system will not allow any more assignments in an *Assigned* or *Pending Approval* status.
Propose	The resource is proposed for the assignment. You can change the status to *Propose* on the Assign Resource page or the Staffing Workbench.	An assignment in this status appears on the resource request, but does not change the request status.
Reject	The assignment is rejected. The status is automatically changed to *Reject* during workflow processing when you reject the assignment on the Assignment Approval page. In the PeopleSoft Program Management system, on the Resources page, the Resource Status will be *Rejected* if the assignment request was not approved.	This status updates the resource request and resource schedule.

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Assignment Status	Description	Triggers These Actions
Reserve	The resource is reserved for the assignment. To change the status to *Reserve* you can: • Select the *Reserve* status on the Assign Resource page. • Select the *Reserve* action on the Staffing Workbench. **Note:** The system does not reserve resources on the Resources page in the PeopleSoft Program Management system. From the Resources page you can choose one of two options. You can select a resource status of *Considered,* which will not generate a PeopleSoft Resource Management assignment. Alternatively, you can select a resource status of *Requested,* which creates a PeopleSoft Resource Management assignment with a status of *Assign* if assignment approval is not required, or with a status of *Pending Approval* if approval is required.	This status updates the resource schedule and appears on the resource request, but does not change the request status.

Valid Status Changes

This table lists available statuses in the right column that you can select for an assignment based on the assignment's current status listed in the left column:

Current Assignment Status	Available Assignment Statuses
None (new assignment)	• Assign • Interview • Propose • Reserve
Assign	• Cancel • Complete
Canceled	None
Complete	None
Interview	• Assign • Cancel • Propose • Reserve
Pending Approval	Cancel
Proposed	• Assign • Cancel • Interview • Reserve

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Current Assignment Status	Available Assignment Statuses
Reject	• Assign • Cancel
Reserve	• Assign • Cancel

Assignment Dates

You can enter multiple date ranges on an assignment to specify that the resource is needed on the job in non-contiguous intervals. For each date range, you can specify different days per week, hours and minutes per day, start and end times, and project role.

New or modified assignment dates trigger changes to the resource's schedule, availability, and profile. You can change assignment dates based on the permissions that are associated with your user role. Based on project business unit options that you select during implementation, a resource's manager can approve or reject schedule changes that are made to the resource's assignment. In addition, the resource, resource manager, or project manager can receive an email notification when the resource's schedule changes.

The system validates that assignment schedules fall within the project schedule. You cannot save an assignment in a status of *Assign* or *Reserve* if the assignment start or end dates are outside of the project's date range.

If you use PeopleSoft Program Management:

- Assignment schedules are reflected on the Resource Detail page in the PeopleSoft Program Management system.

  You can click the assignment ID for approved assignments on the Resource Detail page to open assignments and view details.
- Resources can have only one assignment on a particular day for the same project. Resources can have multiple assignments for the same project, but the assignment schedule dates cannot overlap.

Assignment Holiday Schedules

If you use PeopleSoft Resource Management without PeopleSoft Program Management, and you select the *Do not schedule assignments on Holidays* option on the Installation Options - Resource Management page, the system does not schedule assignments on days that have tasks with a Scheduled Holiday task category as per the Resource's Holiday Schedule.

If you clear the *Do not schedule assignments on Holidays* option, and you create an assignment that conflicts with a resource holiday, the system gives you an option to either save the assignment with the schedule conflict, or return to the Assign Resource page to correct the assignment schedule.

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> **Note**
>
> If you use PeopleSoft Program Management, the system does not schedule assignments on resource holidays if you use the resource calendar to schedule the assignment, and does not schedule assignments on project holidays if you use the project calendar to schedule the assignment. However, if you use the project calendar to schedule the assignment, and the assignment schedule conflicts with a holiday on the resource's calendar, the system gives you an option to either save the assignment with the schedule conflict, or return to the Assign Resource page to correct the assignment schedule.

Holiday Schedule Changes

If you associate a new holiday schedule with a resource, assignments that are created for that resource after the change will use the new holiday schedule. All existing assignments for the resource, regardless of the assignment date ranges, will continue to use the original holiday schedule that was specified for the resource at the time of original assignment creation. This scenario applies if you use PeopleSoft Resource Management without PeopleSoft Program Management, or if you use PeopleSoft Program Management and use the resource calendar to schedule assignments.

If you use PeopleSoft Program Management and use the project calendar to schedule assignments, and you associate a new business calendar with the project, assignments that are created for that project after the change will use the new business calendar. All existing assignments for the project will continue to use the original business calendar that was specified for the project at the time of original assignment creation.

You can cancel or complete existing assignments and create new assignments after changing resource or project calendars.

> **Note**
>
> If you add or remove a holiday from a schedule that is specified for a resource, and run the Holiday Load process runs, existing assignments that are based on the resource's calendar do not change. The existing assignments will retain the holiday schedule that was in place when you created the assignment. Therefore, administrators should set up holiday schedules as far into the future as possible.

Assignment Workflow

You specify a project business unit's workflow options for assignment approvals or notification messages on the Resource Management Options page during implementation.

You can approve assignments in two ways. You can either approve assignments using the Assignment Workflow Engine options or choose to use the traditional workflow options for approving assignments.

Assignment Workflow Engine Options

If you choose to approve assignments using the Approval Workflow Engine, then you must select the **Use Approval Workflow Engine** check box in the Resource Management Options Page. Select the Status Approval process ID *AssignmentStatusApproval* for Assignment

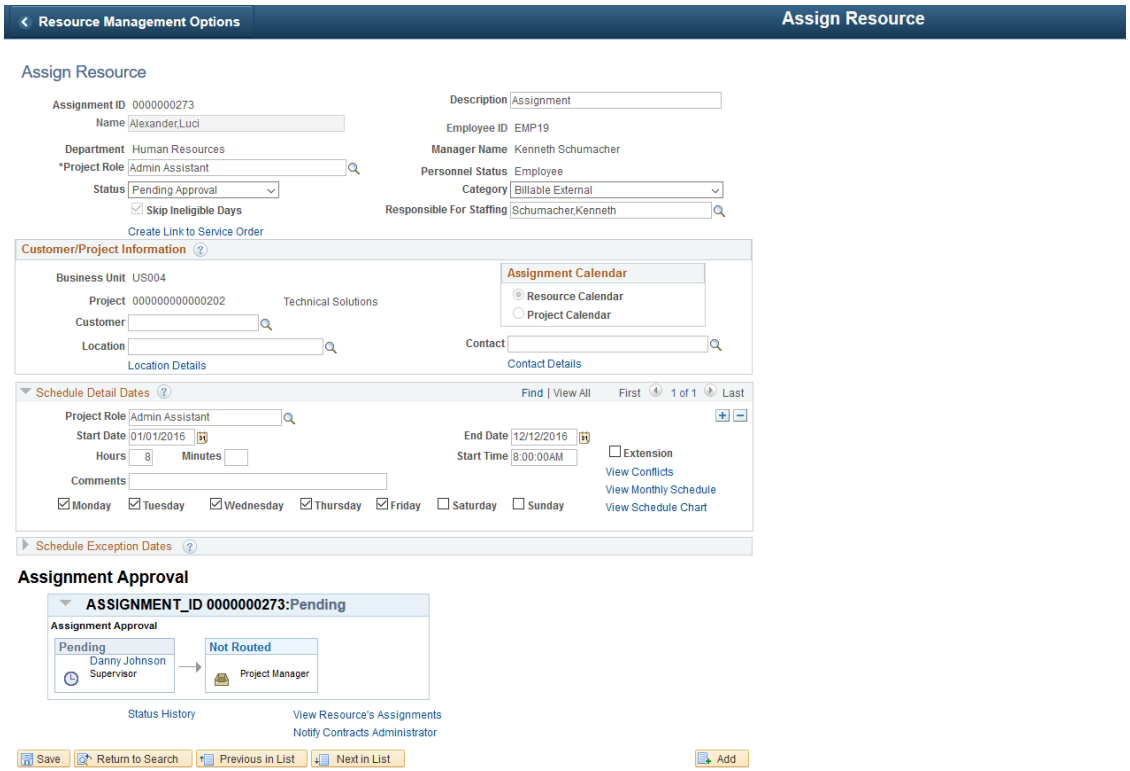
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Status approval. For more information, see the Approval Workflow Engine Options section in the Resource Management Options Page

The assignment status approval is initiated when the Assignment status is set to **Assign** and the transaction is saved. Once an assignment is saved with the **Assign** status, the status moves to **Pending Approval** and the approval workflow is initiated. The approval once initiated is first sent to the supervisor. The supervisor can navigate to the approval component using the Worklist entry, or by clicking on the link in the Push notification, or by accessing the link in the email that is triggered to the approver as part of the approval workflow. The supervisor can enter comments, if any, and approve or reject the assignment. After the supervisor has approved the assignment, the approval moves to the next level, the Project Manager. If the current approver is the final approver, the assignment status changes to **Assign** from **Pending Approval**.

If the approval workflow moves to the next level, the Project Manager at the next level can access the approval component similar to the Supervisor approval action (that is via the Worklist entry, Push notification, or the link on the email). Here, the Project Manager has the option to approve, reject or pushback the assignment.

This example illustrates the fields and controls on the Assign Resource Page — Assignment Approval Workflow.



Use the *AssignmentDateApproval* Process ID to handle any changes in the date in an assignment in the approval workflow.

A Date Change approval workflow is initiated when an assignment in **Assign** status is added an new schedule detail date or an exception detail date. Modifying the existing schedule details date also triggers the date change approval process. The status changes to Pending Approval and the approval is routed first to the Supervisor and then to the Project Manager.

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Traditional Workflow Options

In a traditional worklow for assignment approvals, you determine:

- The roles that must approve resource assignments — the resource manager, the project manager (if you use PeopleSoft Program Management), or both. If you specify that the resource manager must approve assignments, you must also specify which resource manager—the pool manager or the supervisor—is responsible for approving the assignments. If you specify that both the resource manager and project manager must approve assignments, you must also specify which role approves the assignments first. If you are using resource pools, it is recommended that you specify the pool manager as the approving manager.

  If you use PeopleSoft Program Management and you specify that project manager approval is required, a resource cannot be assigned to a project that does not have a project manager. You designate the project manager on the Resource Details page in the Project Resource Plan component (PGM_RESOURCE_LIST).
- If a resource manager must approve assignment schedule changes.
- If a resource, resource manager, or project manager is notified if an assignment schedule changes.
- If a resource, resource manager, or project manager is notified if an assignment's status changes.

  For this option, you select the assignment statuses that trigger a notification message.

See PeopleSoft Program Management: Understanding Schedule Dependencies.

> **Important**
>
> For all resources, if you select **Supervisor** instead of **Pool Manager** in the **Resource Manager Options** group box on the Resource Management Options page, a manager must exist for the resource on the Update Employee Data - Employee Job page before you can use workflow to send assignments for approval or notification to the resource manager.

Assigning Resources

This topic discusses how to assign resources.

Pages Used to Assign Resources

Page Name	Definition Name	Usage
Assign Resource Page	RS_ASSIGN_MAIN	Create, modify, or view assignments.
Assign Resource - Attach Service Order Page	RS_ASSGN_SOLOOK	Associate assignments with existing service orders and resource request line numbers. Assign Resource Page

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Page Name	Definition Name	Usage
Assignment Dates in Conflict Page	RS_ASSGN_DTS	View dates on resources' schedules that overlap assignments. Assign Resource Page
Assign Resource - Schedule Chart Page	RS_ASSGN_GRPH	View resource schedules in a bar chart format. Assign Resource Page
Assign Resource - Assignment Status Page	RS_ASSIGN_HISTORY	Enter new assignment statuses and effective dates, and view the assignment status history.
Job Scorecard for <Resource> Page	RS_JOB_SCRD_SEC	View resources' fit scores against the requirements that you specify in a search or on a resource request.
Assignments for <Resource> Page	RS_RSRCASSGN	View resources' current or past assignments, bids from resources, and recommendations for resources.
Notify Contract Administrator Page	RS_ASSGN_BILL_SEC	Send special billing instructions for this assignment to the contract administrator. Assign Resource Page
Conflicting Dates Found - Assignment Dates Conflict Page	RS_ASSIGN_CONFLICT	Review assignments or appointments that have dates in conflict with assignments. Accept the conflicts or cancel the save and correct the assignments. Saving Assignments
Assignment Confirmation Page	RS_ASSGN_CONF	Review assignment changes and workflows that are triggered for this action. Saving Assignments
Assign Resource (approval) Page	RS_ASSIGN_APRVL	Approve or reject assignments if approval workflow is activated.
Assignment Status	RS_ASSIGN_STATUS	Administrators can modify assignment status description values on this page, if required.

Assign Resource Page

Use the Assign Resource page (RS_ASSIGN_MAIN) to create, modify, or view assignments.

Navigation:

You can access the Assign Resource page through multiple navigation paths. This list presents five frequently used paths. The primary path appears first.

- **Resource Management**, and then **Assign Resource**, and then **Assign Resource**

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- **Resource Management**, and then **Express Search**, and then **Express Search**

  Click **Assign** on a resource row on the Express Search page.

- **Resource Management**, and then **Staffing Workbench**, and then **Manage Utilization**

  Click the **Create Assignment** icon in a resource row on the Staffing Workbench - Manage Utilization page.

- **Resource Management**, and then **Request Resources**, and then **Create or Review Service Order**, and then **Order Summary**

  Click the **Assignment Status** link in the **Assigned Resources** group box.

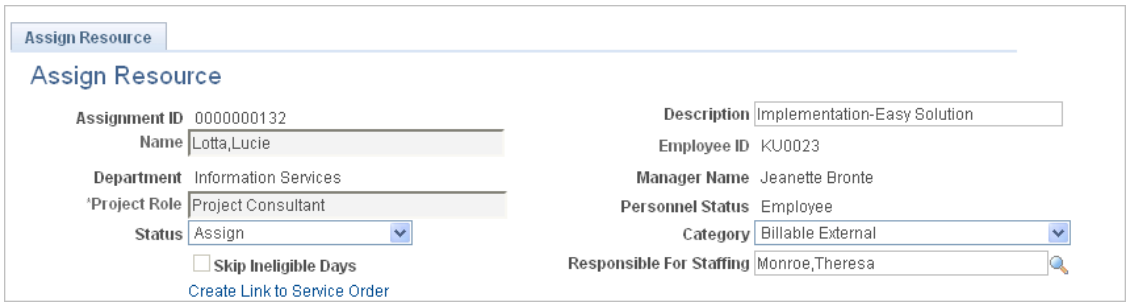
- **Resource Management**, and then **Staffing Workbench**, and then **Fulfill Orders**

  Click the **Status** link in a resource row on the Staffing Workbench - Fulfill Orders page or Staffing Workbench - Manage Utilization page.

Use the Assign Resource-Keyword Search page (RS_ASSIGNMENT) to perform free-form keyword searches for the Assign Resource component. This functionality enables you to search across multiple attributes of the component. You can enter phrases, words, or partial strings to perform your search.

For more information about Keyword Search, see Application Fundamentals: Understanding Keyword Search within Components.

This example illustrates the fields and controls on the Header information on the Assign Resource page. You can find definitions for the fields and controls later on this page.



The default values that appear on an assignment are based on the assignment's origin. For example:

- If you access the Assign Resource page from the Express Search feature, the resource name and assignment date values appear.
- If you create an assignment from the Staffing Workbench fulfillment process, this information populates the assignment from the service order and resource request:
  - Resource name.
  - Assignment description.
  - Project role.
  - Assignment status.
  - Category.
  - Responsible for staffing.
  - Project business unit.

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  - Project.
  - Customer.
  - Location.
  - Contact.
  - Schedule detail dates.
  - Link to the resource request.
  - Link to the named resource on the Resources page in the PeopleSoft Program Management system if the assignment is for a resource request that is associated with a generic resource placeholder.
- If you create an assignment from the Resources page in the PeopleSoft Program Management system, this information populates the assignment from the project or named resource:
  - Resource name.
  - Assignment description.
  - Category.
  - Project role.
  - Project business unit.
  - Project.
  - Schedule detail dates.

> **Note**
>
> If you use PeopleSoft Program Management, you should not modify resource assignments in both PeopleSoft Resource Management and Program Management. Choose one primary method for modifying resource assignments

Your ability to edit fields or select certain field values is based on your user role and the assignment origin.

Field or Control	Description
Assignment ID	Displays the assignment ID that you enter or that the system auto-generated based on the **Assignment ID Last Used** value on the Resource Setup - Common Installation Options page. Auto-generated values appear as *NEXT* until you save the assignment.

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Field or Control	Description
Name	Enter the name of the resource who will work on this assignment. The system populates the assignment hours, start time, and days of the week based on the resource. This field is required to save an assignment in any status. Only those resources whose status, as of the current date, is not *Inactive, Deceased, Terminated,* or *Suspended* will be shown, regardless of whether they are eligible to be staffed or not. **Note:** If you type the resource name in this field and there are multiple employee IDs with the same name, a message appears stating that the system selected the first employee ID that is associated with this resource name. If you want to select a different employee ID, click the **Lookup Employee** icon, search for the resource name, and select the appropriate resource.
Personnel Status	Displays the resource's personnel status as *Employee* or *Non-Employee*.
Department and **Manager Name**	Displays the name of the resource's department and manager.
Project Role	Enter the project role for this assignment. If the assignment is created in the PeopleSoft Program Management system, the project role from the Resource Detail page populates this field and is not editable. This field is required to save an assignment in a status of *Reserve* or *Assign*. You cannot change the project role for assignments in an *Assign* status.
Status	Enter the assignment status. Available values are based on the current status of the assignment. The default value is *Propose*. If you select a status of *Assign* and approval workflow is required, the assignment is automatically placed in a status of *Pending Approval* until it is approved or rejected. Changes to status can trigger email notification to the resource, resource manager, or project manager, depending on the workflow options that you select on the Resource Management Options page during implementation. The system sends a worklist item to the resource if you create a new assignment with a status of *Assigned,* or modify the status of an existing assignment from any status to *Assigned*.

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Field or Control	Description
Skip Ineligible Days	Select this value if you want the system to allow resources that are ineligible to be staffed to be assigned on the assignment. If you do not select this value and select a resource that is ineligible to be staffed during the assignment date range, then the system will issue a warning message when you save the assignment. The value of this field is populated with the value entered in the **Skip Ineligible Days** field on the Installation Options page.
Description	Enter a description of the assignment.
Category	Enter the assignment task category. Use task categories to distinguish between different types of tasks on a resource's schedule, for both informational purposes and in Resource Matching calculation of the Availability fit score. Each task category is assigned a flexibility percentage, which is used in Resource Matching to identify how easily a task of that category can be rescheduled. The default value that appears in the this field is based on the origin of the assignment: • If you create the assignment directly on the Assign Resource page or on the Express Search page, the Category field default value is from the Installation Options - Resource Management page. • If you create the assignment on the Staffing or Pool Manager Workbench, or the Generic Resource Request page, the Category field value is from the Staffing Changes Confirmation page. • If you create the assignment from the Resources page in PeopleSoft Program Management, the Category field value is from the Resource Detail page in Program Management. This field is required to save an assignment.
Responsible For Staffing	Enter or edit the name of the staffing coordinator or person who is responsible for fulfilling this assignment. This field is for information only.
Create Link to Service Order or **Service Order: <service orderID/resource request ID>**	Click the **Create Link to Service Order** link to associate this assignment with an existing service order and resource request line. Available values are based on the project business unit. Once an assignment is associated with a service order, a link to the order appears here. You can click the link to access the service order. Once a link is established, you cannot change or remove it.

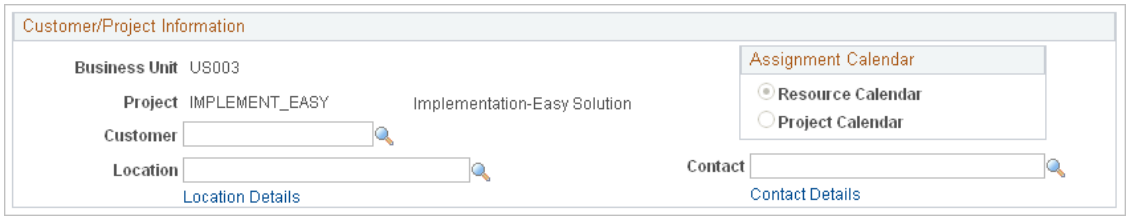
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Field or Control	Description
Generic Resource Name: <resource name>	Click to access the Resources page in the PeopleSoft Program Management system and view the project resource list. This link appears if the assignment is for a resource request that is associated with a generic resource placeholder in the PeopleSoft Program Management system.

Entering Customer and Project Information

Go to the **Customer/Project Information** group box on the Assign Resource page.

This example illustrates the fields and controls on the Customer and project information on the Assign Resource page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Assignment Calendar	Select **Resource** or **Project** to schedule the assignment based on the resource's calendar from PeopleSoft Resource Management or the project calendar from PeopleSoft Project Costing. The appropriate information appears in the **Schedule Detail Dates** group box based on the selected assignment calendar. • **Resource:** Select to base the **Hours** field in the **Schedule Detail Dates** group box on the resource's standard hours as specified in the employee's job information. • **Project:** Select to base the **Hours** field in the **Schedule Detail Dates** group box on the project's hours per day as specified in the Program Management defaults. You cannot switch between the resource and project assignment calendars once the assignment is saved. **Note:** This group box appears only if PeopleSoft Program Management is installed.

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Field or Control	Description
Business Unit	Enter the project business unit for the assignment. You can modify the business unit on assignments that are in a status of *Propose* or *Interview*. You cannot change the business unit after the assignment is saved in a *Reserve*, *Pending Approval*, or *Assign* status. The business unit determines the list of service orders, projects, and customers that you can associate with this assignment. It also controls workflow options for assignment approval, date change approval, and notification messages. This field is required to save an assignment.
Project	Enter the project that is associated with this assignment. You can modify the project on assignments that are in a status of *Propose* or *Interview*. You cannot change the project after the assignment is saved in a *Reserve, Pending Approval*, or *Assign* status. If the assignment is associated with a service order that has a project ID, and the service order has another assignment in a status of *Assign*, then the service order project ID value appears in this field and cannot be changed. If this condition does not exist on the service order, you can enter a project ID. If the assignment is associated with a service order that has a project ID, the assignment project ID must be identical to the service order project ID. If the assignment project is different than the service order project when the assignment status changes to *Assign*, then the assignment project overwrites the service order project. This field is required to save an assignment in a status of *Reserve* or *Assign*.
Customer	Enter the customer name. If the assignment is associated with a service order that has a customer ID, and the service order has another assignment in a status of *Assigned*, then the service order customer ID value appears in this field and cannot be changed. If this condition does not exist on the service order, you can enter a customer ID. If the assignment is associated with a service order that has a customer ID, the assignment customer ID must be identical to the service order customer ID. If the assignment customer is different from the service order customer when the assignment status changes to *Assigned*, then the assignment customer overwrites the service order customer.
Location	Enter the customer location for this assignment.

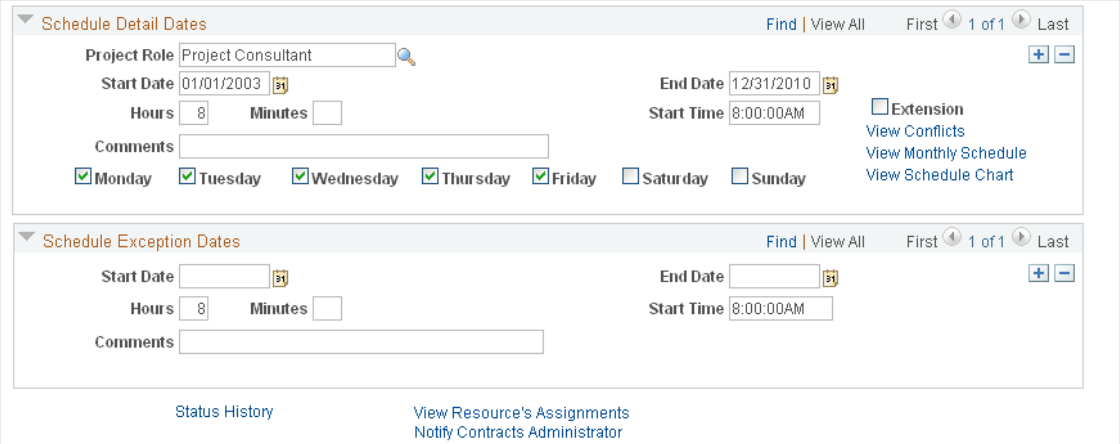
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Field or Control	Description
Location Details	Click to access the customer profile and view or update housing and travel information, dress code, and whether the customer allows trainees on assignments. See Customer Information Page.
Contact	Enter the customer contact for this assignment. See Working with Customer and Contact Profiles.
Contact Details	Click to access the contact profile and view information about the customer contact such as telephone number and email address.

Entering Schedule Details

Go to the **Schedule Detail Dates** and **Schedule Exception Dates** group boxes on the Assign Resource page.

This example illustrates the fields and controls on the Schedule information on the Assign Resource page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Project Role	Enter a project role for the assignment. The default value is the project role that you select in the assignment header. You must select a project role for all detail schedule rows.

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Field or Control	Description
Start Date and **End Date**	Enter the start and end dates for the assignment. If the resource will work on the assignment in noncontinuous intervals, click the **Add a new row** button to add a new row for each date range. For example, if a resource will work on this assignment from January 1 to January 31, and again from March 1 to March 31, enter the schedule details for the first date range on one row and the schedule details for the second date range on another row. Assignment start and end dates must be within the project start and end dates for assignments in a *Reserve* or *Assign* status. The start time will be defaulted to the start time defined on the Resource Management Installation page during save when this field is blank. **Note:** If this assignment is associated with a project resource in the PeopleSoft Program Management system, the system automatically updates the assignment if the resource's project schedule changes.
Hours and **Minutes**	Enter the hours and minutes per day that the resource is expected to work. The value that appears when you enter the resource for this assignment is based on the resource's standard hours that are specified in the employee's job information and stored in the Standard Hours field (STD_HOURS) in the Job record (JOB), and the resource's standard work days that are specified on the resource profile and stored in the Standard Days field (STD_DAYS) in the Worker Table record (RS_WORKER_TBL). However, if PeopleSoft Program Management is installed and you select **Project** in the **Assignment Calendar** group box, the **Hours** field is based on the project's **Hours Per Day** as defined on the Project Definitions - Program Management page in the Project Definitions component of the PeopleSoft Program Management system. Tasks that are equal to the number of hours and minutes that are specified here are created on the resource's schedule for every day of the week that is specified on the assignment that occurs between the start date and end date. The assignment hours are the same for every day on a schedule detail line. **Note:** The system will display an error message when users try to save an assignment with blank Schedule Detail Hours and Minutes fields.

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Field or Control	Description
Start Time	Enter the time of day that the resource starts work. The value that appears when you enter the resource for this assignment is the standard start time that is specified on the Common Definitions - Resources Data page.
Detail Status	Displays a schedule detail row status of **Pending Approval** if assignment schedule changes are submitted but not yet approved. This is to indicate that new or changed data exists on the row. **Note:** This field appears only if assignment schedule change approval is required and a change is submitted but not approved.
Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and **Sunday**	Select the days of the week that the resource is expected to work. If you use the resource assignment calendar, the default value is based on the resource's standard work days that are specified on the resource profile and stored in the Worker Table record. If you use the project assignment calendar, the default value is based on the project calendar that you specify for the project on the Project Definitions - Program Management page. Assignment tasks are entered on the resource's schedule for each day that you select on the assignment page that occurs between the start and end date for assignments in a status of *Assigned, Pending Approval,* or *Reserved.*
Extension	Click if this detail date row is an extension of the original assignment end date. This field is used for information only.
View Monthly Schedule	Click to view a resource's monthly schedule and assignment details based on the specified assignment calendar.
View Schedule Chart	Click to view a vertical bar chart representing the resource's work load and availability by day.

If schedule change approval workflow is activated and the assignment is in an *Assigned* status, the system sends the assignment to the resource manager for approval when the schedule changes.

The system sends a worklist item to the resource if you create or modify a date for an assignment in an *Assigned* status.

Schedule Conflicts

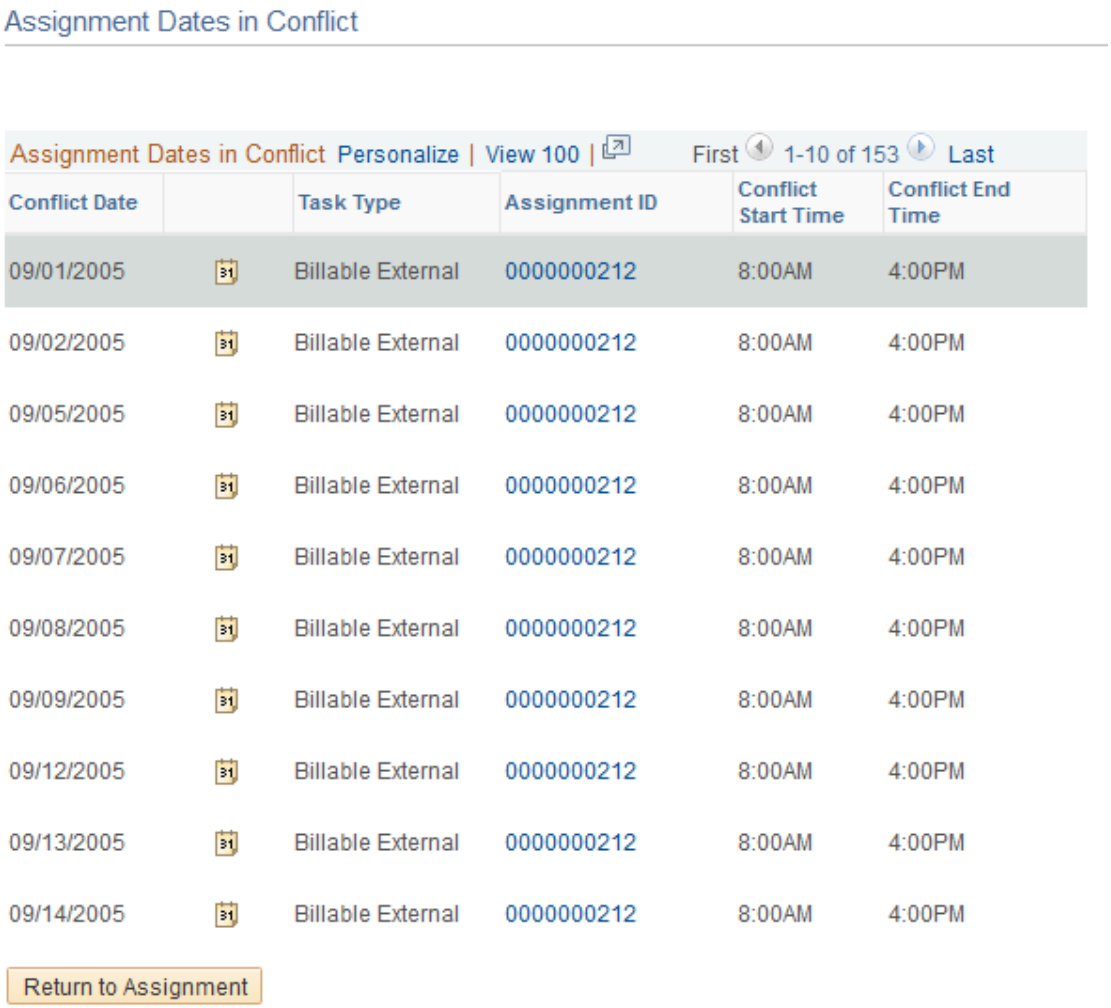
Use the Assignment Dates in Conflict page (RS_ASSGN_DTS) to view dates on resources' schedules that overlap assignments.

Navigation:

Click the **View Conflicts** link on the Assign Resource page.

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This example illustrates the fields and controls on the Assignment Dates in Conflict page. You can find definitions for the fields and controls later on this page.



When you click **View Conflicts** on the Assign Resource page, this page appears if this assignment conflicts with an existing entry on the resource schedule.

This page will also show the duration when the resource is ineligible to be staffed during the assignment period when the **Skip ineligible Days** field is cleared on the Assignment page.

Field or Control	Description
	Click the calendar icon on an appointment row to open the resource's monthly schedule in a new page and view or modify the resource schedule.
Assignment ID	Click an assignment ID on an assignment row to open a new page and view details about the conflicting assignment. You can update or delete conflicting tasks based on the permissions that are associated with your user role, or modify the schedule of the current assignment to accommodate the conflicts.

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Schedule Exception Dates

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

You can create assignment exceptions that occur within a date and time range of a schedule detail row. The scheduling logic first lays out all of the details dates, then removes all the exception dates. The system will return an error if the scheduled exception dates occur outside the assignment dates.

If the **Skip Ineligible** field is selected and the resource is ineligible to be staffed during the assignment duration, then those dates are automatically added in the **Schedule Exception Dates** grid with a Ineligible Date exception.

> **Note**
>
> Use assignment schedule exceptions only to remove assignment tasks for the specified dates—they do not add tasks of another type to the resource schedule in place of the assignment task entries. For example, if you enter an exception for one week due to a vacation, the assignment task does not appear on the schedule for the specified week, and the vacation task does not appear unless you add it manually to the schedule.

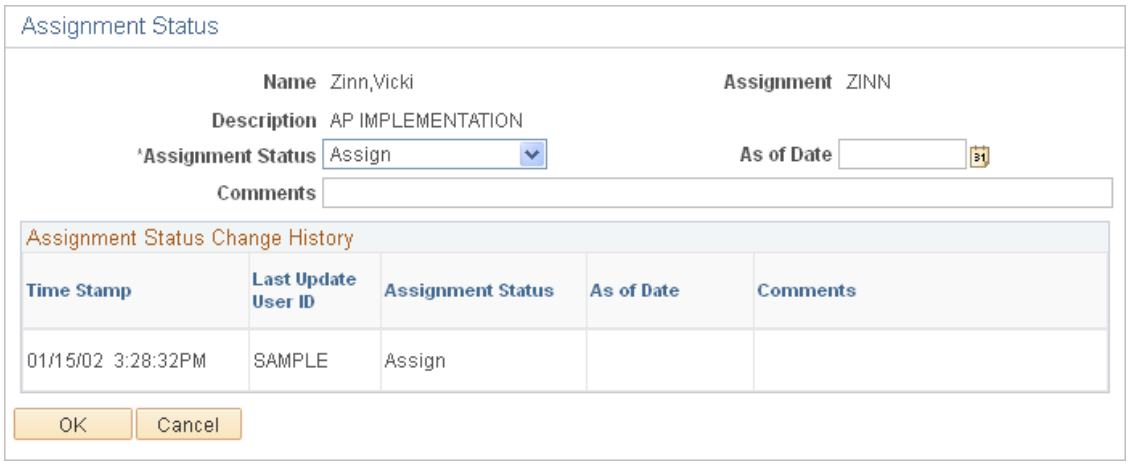
Assign Resource - Assignment Status Page

Use the Assign Resource - Assignment Status page (RS_ASSIGN_HISTORY) to enter new assignment statuses and effective dates, and view the assignment status history.

Navigation:

- Click the **Status History** link on the Assign Resource page.
- Change the assignment status to *Cancel* or *Complete.*

This example illustrates the fields and controls on the Assign Resource - Assignment Status page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Assignment Status	Enter or confirm the assignment status.
As of Date	Enter the effective date of the new status. This field is required if you change the status to *Complete*. Upon saving the assignment with a status of *Complete*, the application removes all of the entries from the resource schedule where the date is greater than the value of the date entered, and updates the work experience entry in the resource profile with the date entered.
Comments	Enter an explanation for the status change.

Assignment Status Change History

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

Assignments for <Resource> Page

This section discusses links to additional scheduling tools that assist you in managing assignments.

View Resource's Assignments

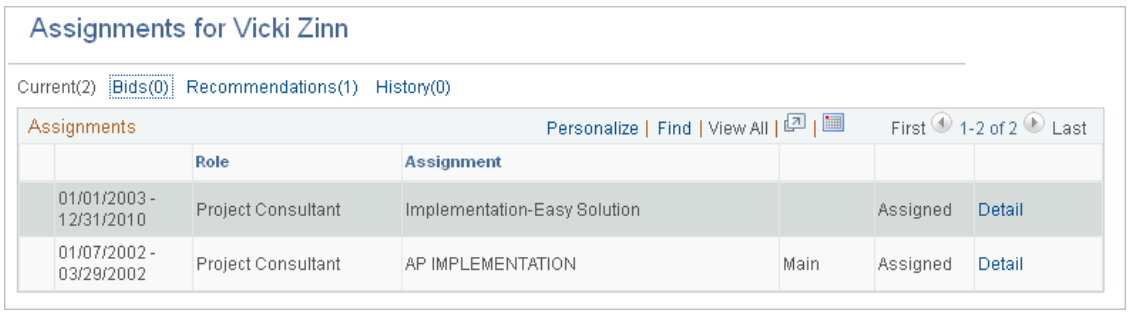
Use the Assignments for <Resource> page (RS_RSRCASSGN) to view resources' current or past assignments, bids from resources, and recommendations for resources.

Navigation:

- Click **View Resource's Assignments** on the Assign Resource page.
- Resource Management, Staffing Workbench

  Click the **View resource assignment list** icon for a resource in the expanded **Requests** scroll area on the Staffing Workbench - Fulfill Orders page.
- Click the **View List of Assignments** icon for a resource in the **Resources** work space on the Staffing Workbench - Manage Utilization page.

This example illustrates the fields and controls on the Assignments for <Resource> page. You can find definitions for the fields and controls later on this page.



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Use the Assignments for <Resource> page to view a list of the resource assignments. You can drill down to view current or previous assignment details on the Current filter or History filter. You can view summary information or details of resource requests for which the resource has placed a bid or been recommended in the Bids filter or Recommendations filter.

The number of assignments or resource requests that are included in a filter appears in parentheses next to the filter name.

Field or Control	Description
Current	Click this link to view a list of the resource's assignments in a status of: • *Proposed* • *Interviewing* • *Pending Approval* • *Assigned* Assignments that appear in this filter are based on the resource's assignment status. A resource does not have to be currently working on the assignment for it to appear in this filter. A visual indicator is used to show the current assignment for the resource based on the assignment start and end dates.
Bids	Click this link to view a list of resource requests for which the resource submitted a bid. A visual indicator is used in this filter if the resource request that placed a bid was assigned to another resource. Bids are removed from this filter once an assignment is created for this resource-and-resource request combination.
Recommendations	Click this link to view a list of resource requests for which the resource received a recommendation. A visual indicator is used in this filter if the resource request was assigned to a different resource. Recommendations are removed from this filter once an assignment is created for this resource-and-resource request combination.
History	Click this link to view a list of your assignments in a status of: • *Completed* • *Canceled* • *Rejected* Assignments that appear in this filter are based on the resource's assignment status.
	A green circle indicates that this is a current assignment for the resource based on the assignment start and end dates. A current assignment is defined as an assignment with a start date equal to or before the current system date, and an end date equal to or after the current system date. This visual indicator may appear in the **Current** filter or **History** filter.

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Field or Control	Description
	This icon indicates that another resource was selected to fulfill a resource request for which this resource submitted a bid or received a recommendation. This visual indicator appears only in the Bids filter or Recommendations filter.
	A red *X* may appear in the **Recommendations** filter or **History** filter. On the **Recommendations** filter, this icon indicates that the resource request is canceled. On the **History** filter, this icon indicates that the assignment is canceled.
Detail	Click in the **Current** filter or **History** filter to access the Assign Resource page and review assignment details. You can modify the assignment or change assignment dates based on permissions that are associated with your user role. To return to the Assignments for <Resource> page, click **OK** to save changes and return, or click **Cancel** to return without saving changes. Click in the **Bids** filter or **Recommendations** filter to access the Job Detail page and review information about the service order and resource request. To return to the Assignments for <Resource> page, click **Return to Resource Assignments.** **Note:** The destination of the **Detail** link changes based on your active filter. See Job Detail Page.

Notify Contract Administrator

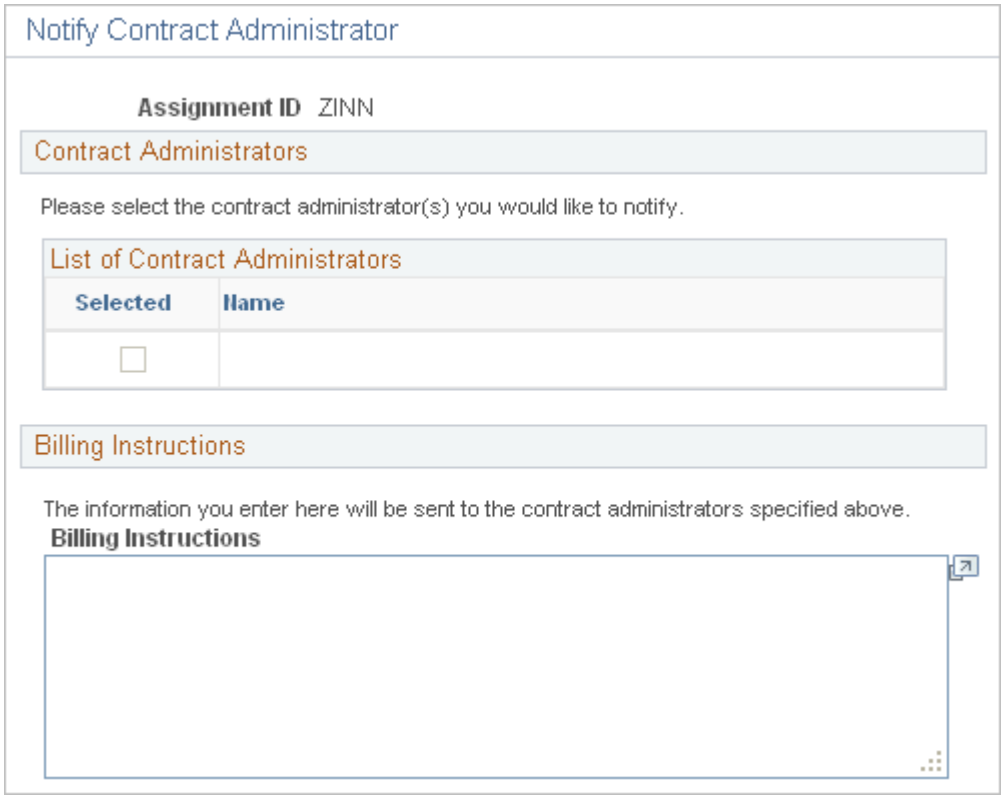
Use the Notify Contract Administrator page (RS_ASSGN_BILL_SEC) to send special billing instructions for this assignment to the contract administrator.

Navigation:

Click **Notify Contracts Administrator** on the Assign Resource page.

This example illustrates the fields and controls on the Notify Contract Administrator page. You can find definitions for the fields and controls later on this page.

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Use this page to send special billing instructions about this assignment to the contract administrator.

Field or Control	Description
Selected	Select from the list of contract administrators, which consists of those users who are identified in the PeopleSoft Contracts system as the managers of support teams on the contract for which this project is associated.
Billing Instructions	Enter comments and instructions.
OK	Click to return to the assignment. The message is sent when you save the assignment.

Other Scheduling Options

You can access these other resource scheduling tools from the Assign Resource page:

- Select **View Score Card** to access the Job Scorecard page and view the detailed evaluation of the resource's qualifications, availability, and preferences compared to the selected resource request.

  This link is available if the assignment is associated with a service order.
- Select **View Monthly Schedule** to access the resource's Monthly Schedule page.
- Select **View Schedule Chart** to access a graphical view of the resource's schedule. The chart displays the default task categories and colors that are specified during implementation on the Installation Options - Resource Management page.

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Related Topics

- Working with Resource Schedules
  The resource schedules that you can view or modify are based on your user role. When you navigate to the Maintain Schedules folder and select the My Monthly Schedule link, the schedule that appears is associated with your user login. If you have access to other resource schedules, you can select the Monthly Schedules link in the Maintain Schedules folder and select a resource schedule to view or modify.
- Application Fundamentals: Defining Resource Management Installation Options

Job Scorecard for <Resource> Page

Use the Job Scorecard for <Resource> page (RS_JOB_SCRD_SEC) to view resources' fit scores against the requirements that you specify in a search or on a resource request.

Navigation:

You can access the Job Scorecard for <Resource> page through multiple navigation paths. This list presents five frequently used paths.

- Click **View Score Card** on the Assign Resource page (if the assignment is associated with a service order).
- Resource Management, Staffing Workbench

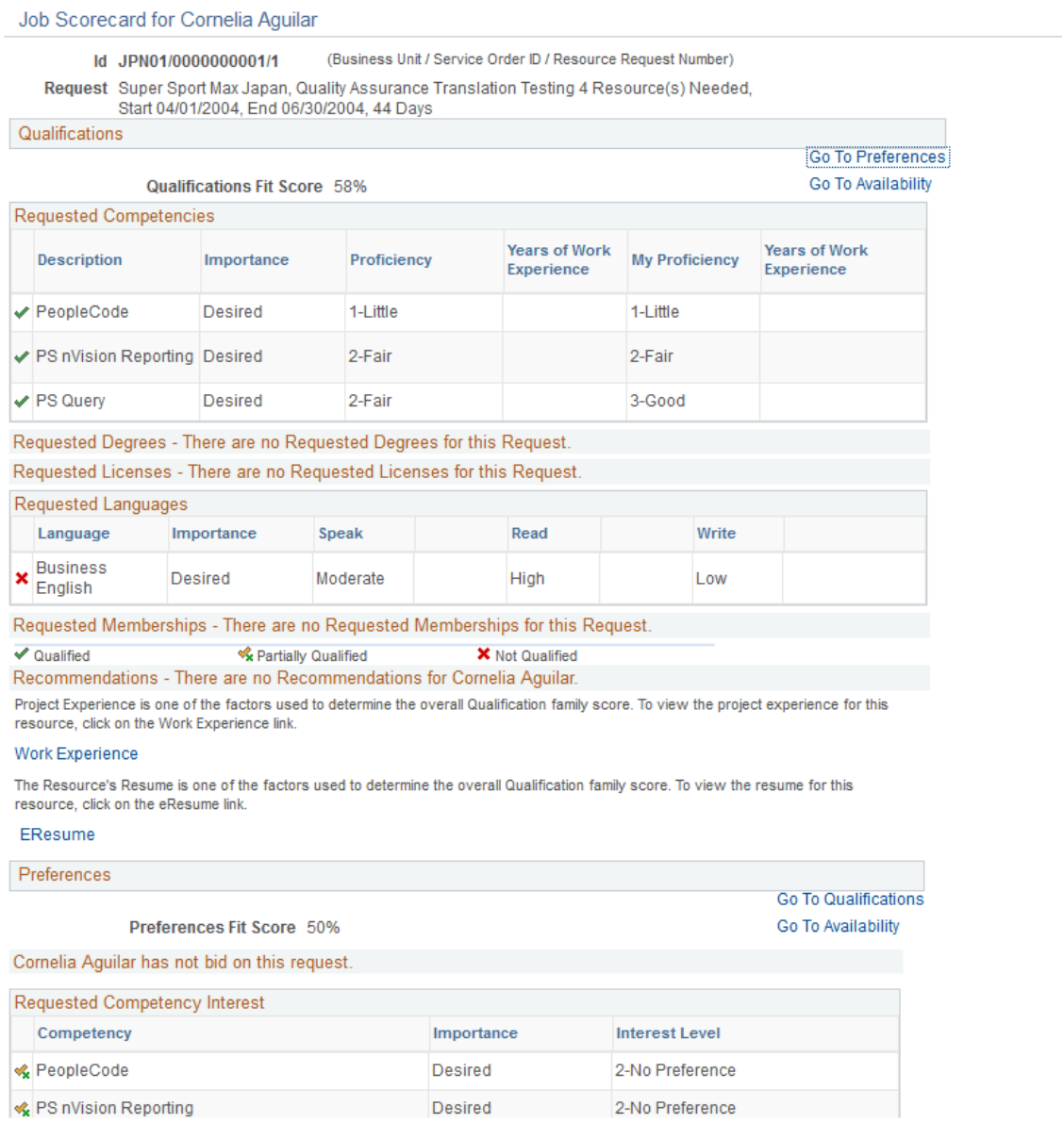
  Click a qualification or availability score for a resource on the Staffing Workbench - Fulfill Orders page.
- Click a qualification or availability score for a resource on the Staffing Workbench - Manage Utilization page.
- Resource Management, My Assignments, Job Spy

  Click a qualification, preferences, or availability score on the Job Spy page.
- **Resource Management**, and then **Express Search**, and then **Express Search**

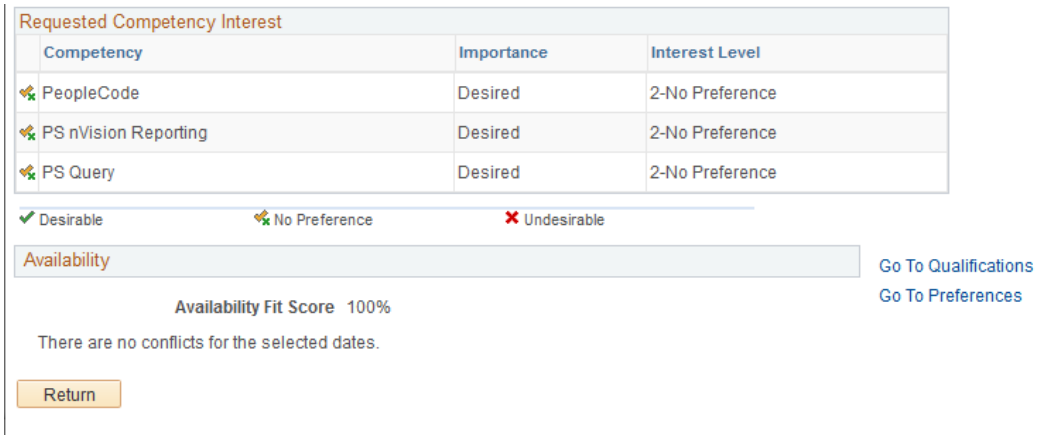
  Click a qualification or availability score for a resource in the **Search Results** grid on the Express Search page.

This example illustrates the fields and controls on the Job Scorecard for <Resource> page. You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the Job Scorecard for Resource page (2 of 2). You can find definitions for the fields and controls later on this page.



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This page is available if the assignment is associated with a service order.

Field or Control	Description
ID	Displays a concatenation of the business unit, service order ID, and resource request ID. This field does not appear if you access the Job Scorecard page from an express search.
Request	Displays information about the resource request if this page is accessed from a service order or the Staffing Workbench.
Qualifications	Displays the qualifications score and lists each specified qualification. Indicates if the resource is qualified, partially qualified, or not qualified based on this accomplishment, competency, or flexible qualification factor.
	In the **Qualifications** region, a green check mark indicates that the resource meets all of the aspects of the specified competency, accomplishment, or flexible qualification factor. In the **Preferences** region, this icon indicates that the resource has indicated a desirable preference for this competency.
	In the **Qualifications** region, a yellow check mark with a green *x* indicates that the resource partially meets the specified competency, accomplishment, or flexible qualification factor. In the **Preferences** region, this icon indicates that the resource has no preference for this competency.
	In the **Qualifications** region, a red *x* indicates that the resource does not meet the specified competency, accomplishment, or flexible qualification factor. In the **Preferences** region, this icon indicates that this competency is undesirable to the resource.
Work Experience	Click this link to access the Work Experience page on the resource profile.
EResume	Click this link to access the resource's resume document attachment.
Preferences	This group box displays the preferences score and lists each specified qualification. Indicates if the qualification is desirable or undesirable, or if the resource has no preference. It also includes bids and flexible preference factors.

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Field or Control	Description
Availability	This group box displays schedule conflicts and provides a link to the resource schedule to view schedule details. Regarding holidays, a date conflict appears when there is an entry on the resource's schedule with the task type of Scheduled Holiday that overlaps with the date range on the resource request. This occurs regardless of the skip holiday option that you specified on the Installation Options - Resource Management page. If there are no schedule conflicts, a message appears indicating that there are no conflicts for the selected dates.
Return	Click this button to return to the page where you accessed the Job Scorecard. **Note:** The Qualifications, Preferences, and Availability scores represent the actual scores of the resource for the request. If you accessed this page from the Staffing Workbench, Pool Manager Workbench, Express Search, or the Job Spy, the scores that appear on these pages may vary from the Job Scorecard scores. The scores that appear on the workbench pages are based on the search settings and relative weights that you selected.

Saving Assignments

Click **Save** to save the assignment. If you save an assignment in a status of *Reserve* or *Assign,* the system verifies that the assignment schedule falls within the project date range.

Assignment Dates Conflict

If there are schedule conflicts, the Conflicting Dates Found - Assignment Dates Conflict page appears, listing the appointments or assignments that have dates in conflict with this assignment. If you accept the conflicts, the system saves assignment with the resource overbooked. This means that the resource may be scheduled to work more than the standard hours per day, depending on how many hours the resource is scheduled to work on the assignments or appointments that occur on the dates in conflict.

Click **OK** to save the assignment regardless of the overbooking. Click **Cancel** to return to the assignment and correct the dates.

If you create an assignment from an express search, you can click **Apply** or **OK** on the Assign Resource page to save the assignment. Use **Apply** if you want to view a confirmation of the assignment after you save it.

The system displays an error message if the assignment start time is before the resource establishment date in Resource Management.

Saving Assignments Using Program Management

If you use PeopleSoft Program Management, and the assignment schedule dates conflict with an existing assignment for this resource and project, when you save the assignment a

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message appears indicating that an assignment exists for the resource for the scheduled date range. Click **OK** to return to the assignment and resolve the schedule date conflict. You cannot save the assignment if assignment dates overlap for this resource and project. However, for a canceled assignment, you will be able to save the assignment with overlapping dates for this resource and project.

Assignment Confirmation

If there are no schedule conflicts when you save the assignment in a status of *Assign* or *Reserve,* or if you accept the conflicts, the Assignment Confirmation page appears with a summary of the workflow and changes that the save triggers. Click **OK** to return to the Assign Resource page.

If you create an assignment with a status of *Assign* or *Reserve* from an express search, click **Apply** to save the assignment and view the Assignment Confirmation page if there are no schedule conflicts, then click **OK** on the Assignment Confirmation page to return to the Express Search page. Alternatively, click **OK** on the Assign Resource page to save the assignment if there are no schedule conflicts, and return to the Express Search page.

Assign Resource (approval) Page

Use the Assign Resource (approval) page (RS_ASSIGN_APRVL) to approve or reject assignments if approval workflow is activated.

Navigation:

- **Resource Management**, and then **Staffing Workbench**, and then **Worklist**

  Click **Details** for an item with action *New Assignment For Approval.*
- Log in as a resource manager and go to the Assign Resource page.

  Resource Management, and then **Assign Resource**, and then **Assign Resource**

If assignments require the resource manager's approval, an assignment can be placed in a status of *Assign* only through the approval process or directly by the resource's manager. If you select an assignment status of *Assign* and approval workflow is activated, the assignment is automatically placed in a status of *Pending Approval* until the resource manager approves or rejects it.

> **Note**
>
> If two levels of approval are required, on first approval, the status does not change to *Assign* but rather remains in a *Pending Approval* status. After the second required approval, the status of the assignment changes to *Assign.*

Field or Control	Description
Justification	Enter remarks that are pertinent to the assignment approval or rejection. The system appends this information to the assignment history.
Approve	Click to change the assignment status to *Assign.*
Reject	Click to change the assignment status to *Reject.*

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Approving Assignments Using PeopleSoft Fluid User Interface

This topic discusses approving Assignments using the PeopleSoft Fluid User Interface.

Understanding Resource Assignment Approvals

Using resource assignment approvals, approvers can:

- Approve, deny, or push back the write-off.
- Perform approval actions for one or more resource assignments.
- Add comments for approval actions.
- View attachments.
- Receive approval notifications.

Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of notifications in one central location. Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

For more information about Notification Composer Framework, see Enterprise Components: Understanding Notification Composer

Delegating Resource Assignment Approvals

You can use the Delegation Framework to delegate resource assignment approval authority to other users, who can then take action on specific transactions on your behalf.

For more information, on setting up and using Delegation Framework see:

Enterprise Components: Understanding Delegation

Enterprise Components: Configuring Delegation Transactions

Enterprise Components: Working with Self-Service Delegation

Pages Used to Approve Assignments Using PeopleSoft Fluid User Interface

Page Name	Definition Name	Usage
Pending Approvals - Resource Assignment (List)	EOAWMA_MAIN_FL	View the Assignments routed for approval. For more information, see the Application Fundamentals: Pending Approvals Page
Resource Assignment Page	EOAWMA_TXNHDTL_FL	Review and approve, or deny, or pushback Assignments. For more information, see the Application Fundamentals: Approval Header Detail Page.

General information about Mobile Approvals is available in FSCM Application Fundamentals documentation. See

- Application Fundamentals: Understanding Fluid Approvals in FSCM.

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- Application Fundamentals: Configuring Fluid Approvals.
- Application Fundamentals: Approving Pending Transactions in Fluid.

Related Topics

- Enterprise Components: Setting Up and Using Fluid Approvals

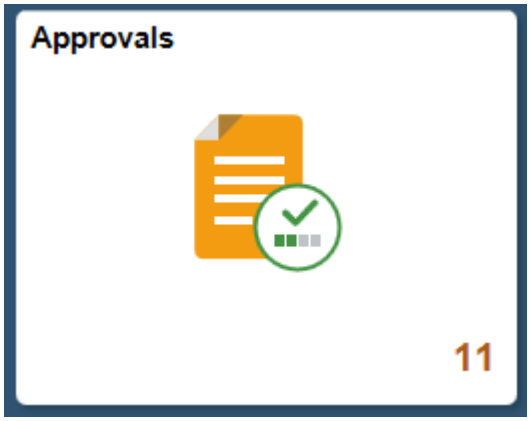
Approvals Tile

Use the Approvals tile to access the Pending Approvals page.

Navigation:

This tile can be placed on any PeopleSoft Fluid Home page.

This example illustrates the fields and controls on the Approvals Tile. You can find definitions for the fields and controls later on this page.



For information about how to add a tile to a PeopleSoft Fluid Home page, see Application Fundamentals: Adding Homepages and Tiles.

The tile can show the total number of pending approvals. If no pending approvals are available, the tile does not display a number count.

Pending Approvals - Resource Assignment (List)

Use the Pending Approvals - Resource Assignment list page (EOAWMA_MAIN_FL) to view the Assignments routed for approval.

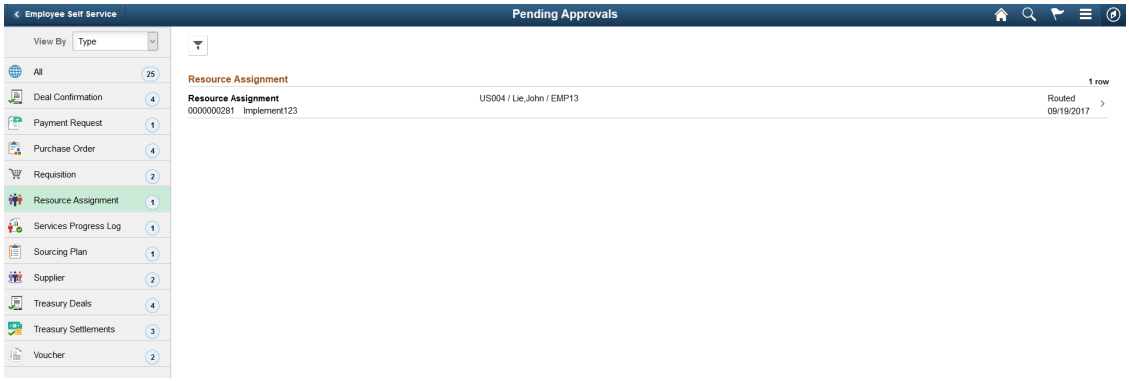
Navigation:

Employee Self Service, and then **Approvals** .

On the Pending Approvals page, select **Resource Assignment** in the View By Type pane to view the list of Resource Assignments in the right pane.

This example illustrates the fields and controls on the Pending Approvals - Resource Assignment list page. You can find definitions for the fields and controls later on this page.

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Select a row to view more details about a Resource Assignment . You can use the filter to narrow results on the page. For more information about using the filter, see the Application Fundamentals: Filters Page

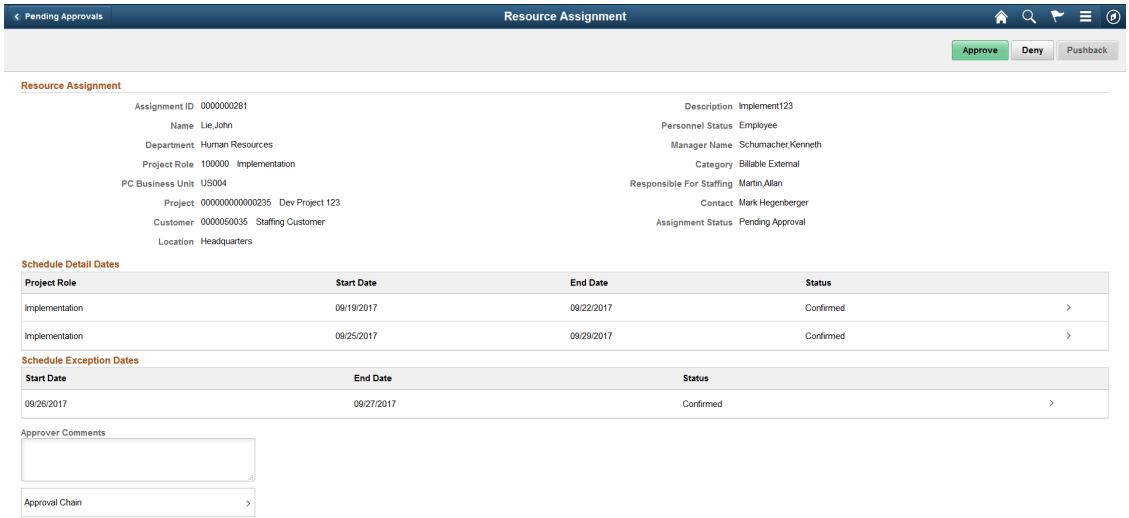
Resource Assignment Page

Use the Resource Assignment page (EOAWMA_TXNHDTL_FL) to review and approve, or deny, or pushback Assignments.

Navigation:

Select a Resource Assignment row on the Pending Approvals - Resource Assignment list page.

This example illustrates the fields and controls on the Resource Assignment page. You can find definitions for the fields and controls later on this page.

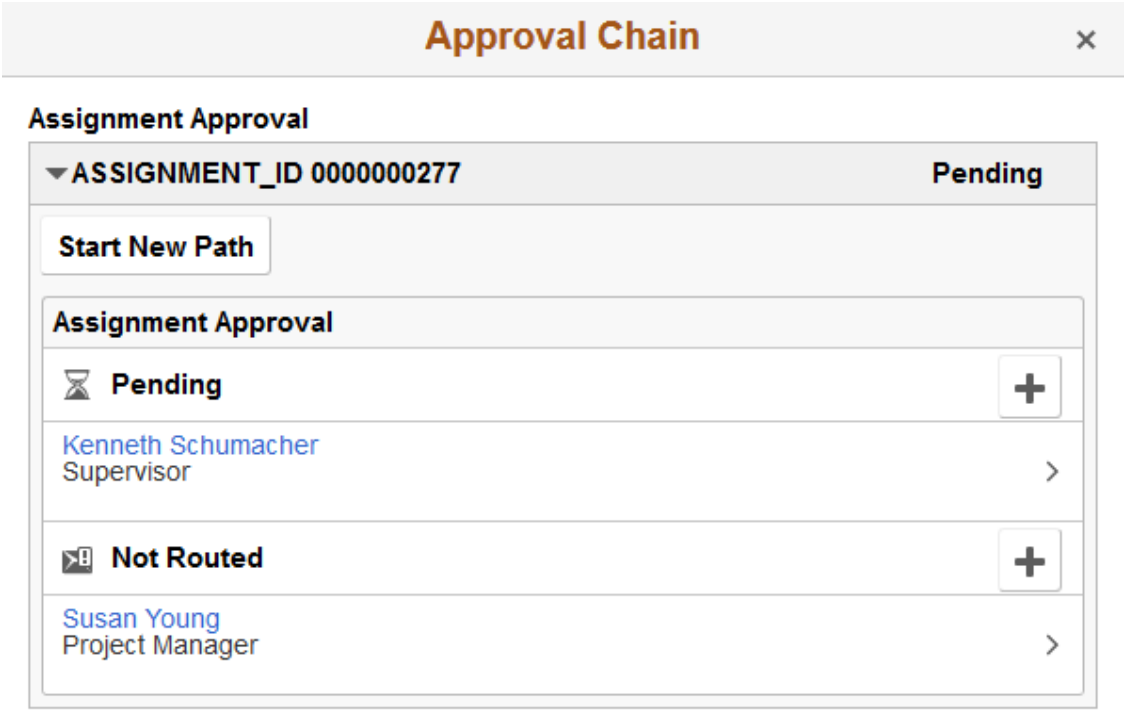


Field or Control	Description
Schedule Detail Dates	Select a line to view the schedule dates and details for the Resource Assignment.

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Field or Control	Description
Schedule Exception Dates	Select a line to view the exception dates in the assignment schedule for the Resource Assignment.
Approver Comments	Enter comments in the text entry field.
Approval Chain	Select to review approval chain information. The approval chain reflects approval status generated by the Application Workflow Engine (AWE). For more information about using AWE workflows, see Approval Framework: Approval Framework Overview.You can expand or collapse approver information for each line by selecting the Expand/Collapse icon. You can also select the approver name to view approver details.

This example illustrates the fields and controls on the Approval Chain Page.



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Field or Control	Description
Approve , **Deny**, **Pushback**	Select an action button to approve, deny or pushback Assignments. When you select an action button, you have the option to select **Submit** to continue the action or **Cancel** to back out of the action. Upon submitting the action, the system generates a message that the action is successful.

Related Topics

- Assigning Resources
  This topic discusses how to assign resources.

Approving Assignment Schedule Changes

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

This topic provides an overview of assignment schedule changes and discusses how to approve assignment schedule changes.

Understanding Assignment Schedule Changes

You can modify assignment schedules based on the security access of your user role. Resources access the Assign Resource update schedule page from the My Assignments - Assignments page, or by clicking **Assign Resource** in the Resource Management navigation folder.

These actions occur if a resource's assignment status is *Assigned* or *Pending Approval,* someone other than the resource's manager changes the assignment schedule, and assignment schedule change workflow is activated for the project business unit on the assignment:

- The system changes any new or changed assignment detail to a *Pending* status.

  The assignment status remains *Assigned.*
- The pending dates are reflected on the assignment, the resource's schedule and availability, and in the PeopleSoft Program Management system, if applicable.
- The system sends a worklist entry to the resource's manager with a link to the Assign Resource approval page.
- Approved changes to the schedule update the status from *Pending* to *Confirmed.*
- Rejected schedule changes revert the assignment, the resource's schedule, availability, and project team back to the pre-change assignment schedule.

  The pre-change schedule appears on the assignment and reverts back to a status of *Confirmed.*

These actions occur if the assignment is in any status other than *Assigned* or *Pending Approval,* the assignment schedule changes, and assignment schedule change workflow is activated; or, if the assignment is in an *Assigned* or *Pending Approval* status, the assignment schedule changes, and assignment schedule change workflow is not activated:

- The assignment schedule status is *Confirmed.*

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- The system does not generate worklist entries, and no schedule change approvals are required.
- The system publishes schedule changes to the PeopleSoft Program Management system, if applicable.

You cannot save an assignment schedule change if it is associated with a project and the new schedule falls outside of the project's early start and late finish dates.

Page Used to Approve Assignment Schedule Changes

Page Name	Definition Name	Usage
Assign Resource (approval) Page	RS_ASSIGN_APRVL	Approve or reject assignment schedule changes if approval workflow is activated.

Assign Resource (approval) Page

Use the Assign Resource (approval) page (RS_ASSIGN_APRVL) to approve or reject assignment schedule changes if approval workflow is activated.

Navigation:

- **Resource Management**, and then **Staffing Workbench**, and then **Worklist**

  Click **Details** for an item with action *Date Change For Approval.*
- Log in as a resource manager and access the Assign Resource page.

  Resource Management, and then **Assign Resource**

You approve assignment schedule changes in the same way that you approve new assignments. You can enter a justification and click **Approve** or **Reject.**

Approving Assignment Schedule Changes Using PeopleSoft Fluid User Interface

This topic discusses modifying the schedules in existing assignments using the PeopleSoft Fluid User Interface.

Understanding Assignment Schedule Change Approvals Using PeopleSoft Fluid User Interface

Using assignment schedule change approvals, approvers can:

- Approve, deny, or push back the write-off.
- Perform approval actions for one or more resource assignments.
- Add comments for approval actions.
- View attachments.
- Receive approval notifications.

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Delegating Assignment Schedule Change Approvals

You can use the Delegation Framework to delegate assignment schedule change approval authority to other users, who can then take action on specific transactions on your behalf.

For more information, on setting up and using Delegation Framework see:

Enterprise Components: Understanding Delegation

Enterprise Components: Configuring Delegation Transactions

Enterprise Components: Working with Self-Service Delegation

Pages Used to Approve Assignment Schedule Changes Using PeopleSoft Fluid User Interface

Page Name	Definition Name	Usage
Pending Approvals - Resource Date Change (List)	EOAWMA_MAIN_FL	View the Resource Assignments routed for approval for a date change. For more information, see the Application Fundamentals: Pending Approvals Page
Resource Date Change Page	EOAWMA_TXNHDTL_FL	Review and approve, or deny, or pushback date changes for a Resource Assignment. For more information, see the Application Fundamentals: Approval Header Detail Page.

General information about Mobile Approvals is available in FSCM Application Fundamentals documentation. See

- Application Fundamentals: Understanding Fluid Approvals in FSCM.
- Application Fundamentals: Configuring Fluid Approvals.
- Application Fundamentals: Approving Pending Transactions in Fluid.

Related Topics

- Enterprise Components: Setting Up and Using Fluid Approvals

Approvals Tile

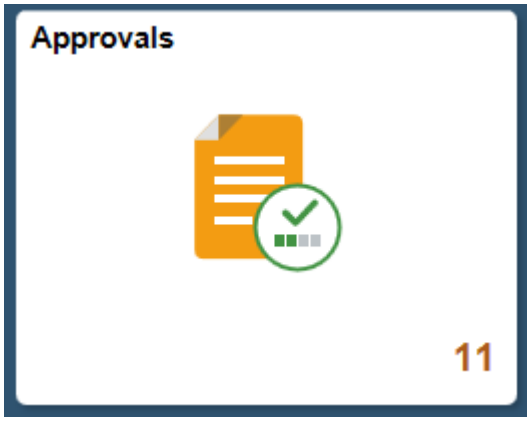
Use the Approvals tile to access the Pending Approvals page.

Navigation:

This tile can be placed on any PeopleSoft Fluid Home page.

This example illustrates the fields and controls on the Approvals Tile. You can find definitions for the fields and controls later on this page.

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For information about how to add a tile to a PeopleSoft Fluid Home page, see Application Fundamentals: Adding Homepages and Tiles.

The tile can show the total number of pending approvals. If no pending approvals are available, the tile does not display a number count.

Pending Approvals - Resource Date Change (List)

Use the Pending Approvals - Resource Date Change list page (EOAWMA_MAIN_FL) to view the Resource Assignments routed for approval for a date change.

Navigation:

Employee Self Service, and then **Approvals** .

On the Pending Approvals page, select **Resource Date Change** in the View By Type pane to view the list of Resource Assignments in the right pane.

This example illustrates the fields and controls on the Pending Approvals - Resource Date Change list page.



Select a row to view more details about a Resource Assignment . You can use the filter to narrow results on the page. For more information about using the filter, see the Application Fundamentals: Filters Page

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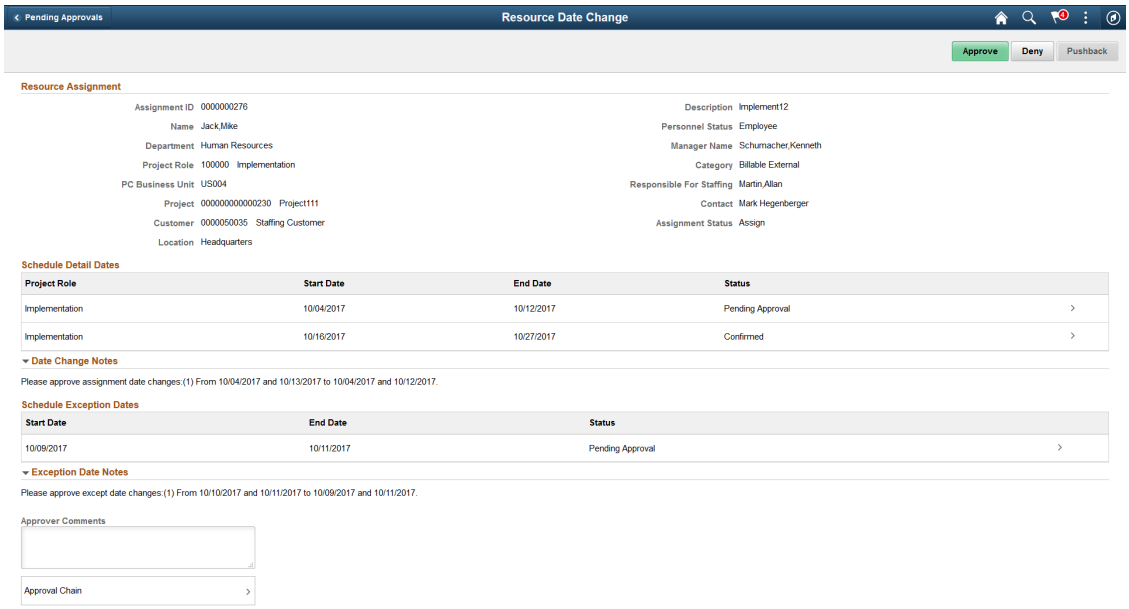
Resource Date Change Page

Use the Resource Date Change page (EOAWMA_TXNHDTL_FL) to review and approve, or deny, or pushback date changes for a Resource Assignment.

Navigation:

Select a Resource Assignment row on the Pending Approvals - Resource Date Change list page.

This example illustrates the fields and controls on the Resource Date Change page. You can find definitions for the fields and controls later on this page.

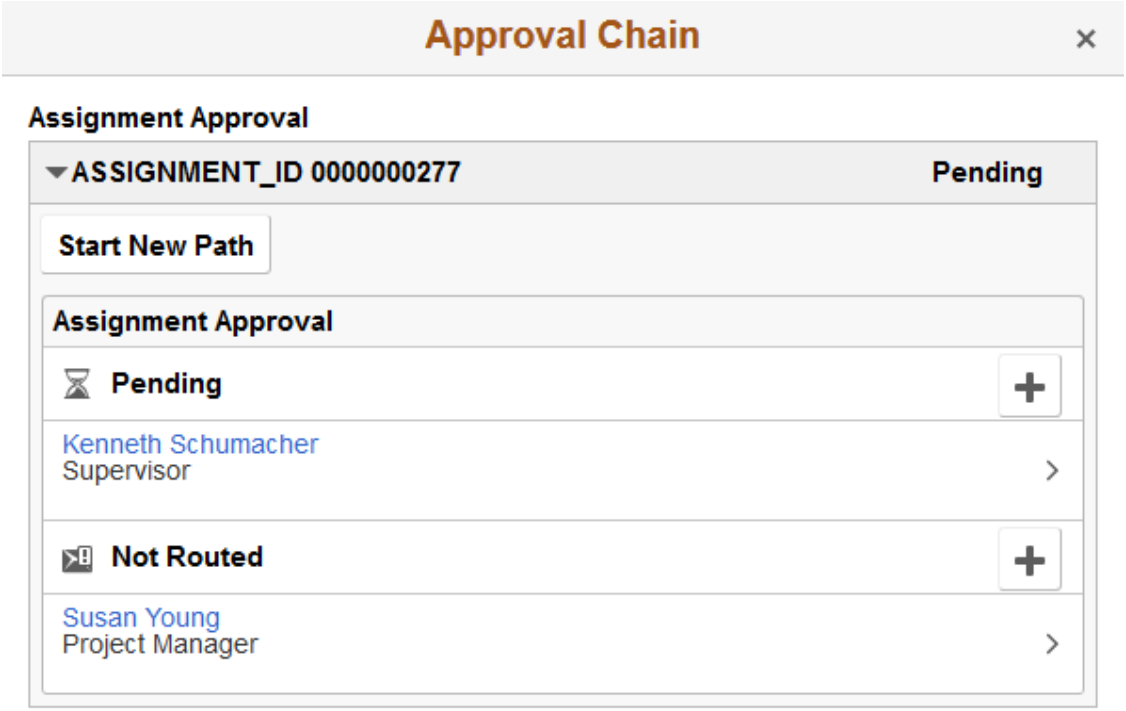


Field or Control	Description
Schedule Detail Dates	Select a line to view the schedule dates and details for the Resource Assignment.
Date Change Notes	Displays any notes associated with the date change for the Resource Assignment.
Schedule Exception Dates	Select a line to view the exception dates in the assignment schedule for the Resource Assignment.
Exception Date Notes	Displays any notes associated with the exception date changes for the Resource Assignment.
Approver Comments	Enter comments in the text entry field.

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Field or Control	Description
Approval Chain	Select to review approval chain information. The approval chain reflects approval status generated by the Application Workflow Engine (AWE). For more information about using AWE workflows, see Approval Framework: Approval Framework Overview.You can expand or collapse approver information for each line by selecting the Expand/Collapse icon. You can also select the approver name to view approver details.

This example illustrates the fields and controls on the Approval Chain Page.



Field or Control	Description
Approve , **Deny**, **Pushback**	Select an action button to approve, deny or pushback date changes for the Resource Assignment. When you select an action button, you have the option to select **Submit** to continue the action or **Cancel** to back out of the action. Upon submitting the action, the system generates a message that the action is successful.

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Related Topics

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

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23

Express Searching for Resources

Understanding the Express Search Feature

The Express Search feature enables you to specify resource requirements and search for resources to fulfill those requirements in a single session, without a service order. You can define requirements by using a qualification profile or by selecting from a list of qualifications or from the Competency tree. You can also enter free-form keywords in the search criteria. After you define the qualifications, specify the project start and end dates, and select the group of resources or resource pool to consider, the Search Framework goes to work. The process compares the resource profiles for all members of the resource group or pool to determine a qualification ranking. It then looks at the resource schedules and returns a list of resources in order of qualification rank and availability.

Use the Express Search feature to:

- Identify possible resources for an opportunity where a formal request for services is premature.
- Search for resources, select the appropriate resource, and create an assignment in a single session where an audit trail of formal requests for services is not required.
- Explore knowledge capital in specific parts of the organization.
- Identify qualified candidates to fulfill project resource requirements in PeopleSoft Program Management.

If you find resource candidates for the specified requirements but want to keep searching with slightly different requirements, you can move the candidates to a holding area and perform iterative searches. If you decide to save the search criteria—dates, qualifications, and keywords—as a service order, the resources in the holding area appear as recommendations in the service order resource request.

> **Note**
>
> The Express Search feature does not evaluate manager recommendations or resource bids to determine the qualification ranking.

Prerequisites

Before you can use the Express Search feature, you must:

- Create resource groups and resource pools.

  These enable you to limit, broaden, or redirect the search for resources from the Express Search page.

  See Establishing Resource Groups.

- Create the search index.

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This enables you to search on competencies, accomplishments, work experience, and default resume attachment information for each eligible resource.

See Setting Up and Maintaining the Search Framework and Resource Matching Cache Tables.

Express Searching

This topic discusses how to search for resources using Express Search.

Pages Used to Express Search for Resources

Page Name	Definition Name	Usage
Express Search Page	RS_EXPRESS_SEARCH	Perform iterative searches for resources based on resource qualifications and competency interests.
Express Search - Detailed Date Ranges Page	RS_SO_DETAILDATES	Add multiple, non-contiguous date ranges to search criteria. Express Search Page
Resource Qualifications - Select Qualification Profile Page	RS_SELQUALPROFILE	Add qualifications to the search criteria from existing qualification profiles. Specifying Qualifications
Resource Qualifications - Search for Qualifications Page	RS_QUALIF_SRCH	Add qualifications to the search criteria from a list of qualifications. Specifying Qualifications
Resource Qualifications - Select Competencies Page	RS_SO_COMP	Pick qualifications for the search criteria from the Competency tree. Specifying Qualifications
Qualification Detail: <Qualification> Page	RS_QUALIF_DETAILS	Specify additional details about requested license, language, or single-value flexible attributes. Specifying Qualifications
Job Scorecard for <Resource> Page	RS_JOB_SCRD_SEC	View resource fit scores against the requirements that you specify in a search or on a resource request.

Express Search Page

Use the Express Search page (RS_EXPRESS_SEARCH) to perform iterative searches for resources based on resource qualifications and competency interests.

The Express Search page displays a default qualification profile if a qualification profile was set as the default profile when the qualification profile was created. The default profile that appears on the Express Search page is based on the SETID defined on the User Preferences page.

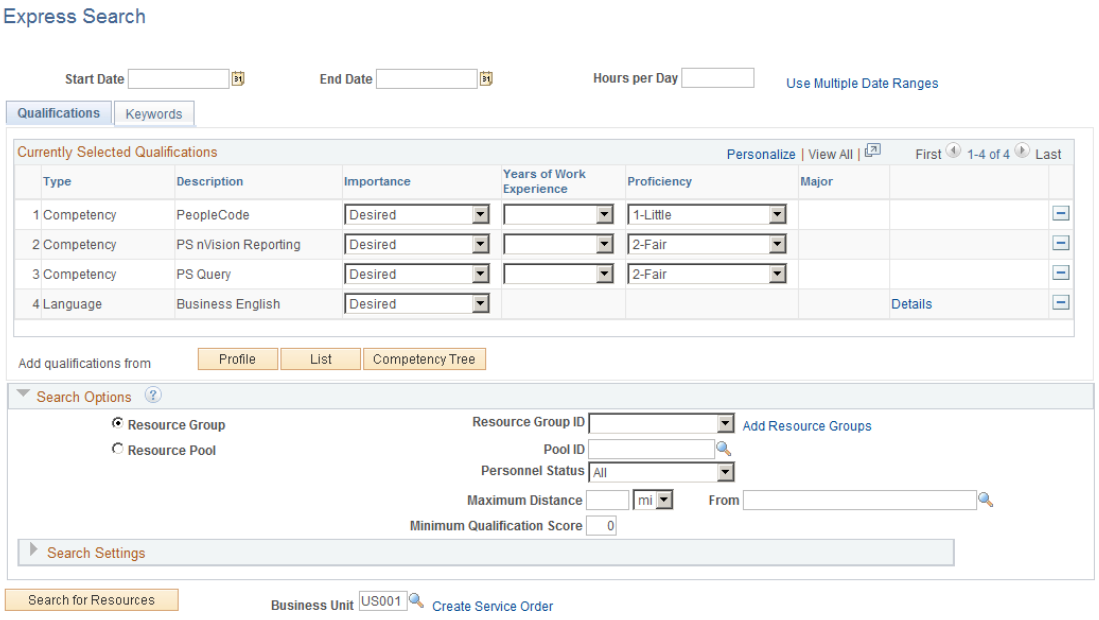
Navigation:

- **Resource Management**, and then **Express Search for Resources**

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- Click **Search** in a generic resource row on the Resources page in Program Management.

This example illustrates the fields and controls on the Express Search page. You can find definitions for the fields and controls later on this page.



Start defining search criteria by entering the project start date, end date, and the number of hours per day. Then you can specify as many qualifications or keywords as necessary to narrow the list of resources that the system returns in the search results.

If you express search from the Resources page in PeopleSoft Program Management, this information populates the Express Search page from the generic resource:

- Start and end dates.
- Hours per day.
- Qualifications, if the generic resource project role is associated with a qualification profile in PeopleSoft Resource Management.

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Field or Control	Description
Start Date and **End Date**	Enter the dates on which the resource starts and ends the work assignment. If the resource is required for multiple, non-contiguous date ranges, you can leave these fields blank and proceed to the Express Search - Detailed Date Ranges page to enter date information. When you return to this page after entering multiple date ranges on the Express Search - Detailed Date Ranges page, the **Start Date**and **End Date**fields on this page display the first start date and last end date for all date ranges. If you access this page from the Resources page in PeopleSoft Program Management, start and end dates are populated from the generic resource schedule.
Hours per Day	Enter the number of hours per day that the resource is requested to work. The system uses this data in the availability calculation for a resource. This field is blank if you require the resource to work for multiple date ranges. If you access this page from the Resources page in PeopleSoft Program Management, the hours per day are calculated based on the **Units** field on the assignment schedule row on the Resource Detail page.
Use Multiple Date Ranges	Click to access the Express Search - Detailed Date Ranges page and enter additional start dates, end dates, and hours per day.

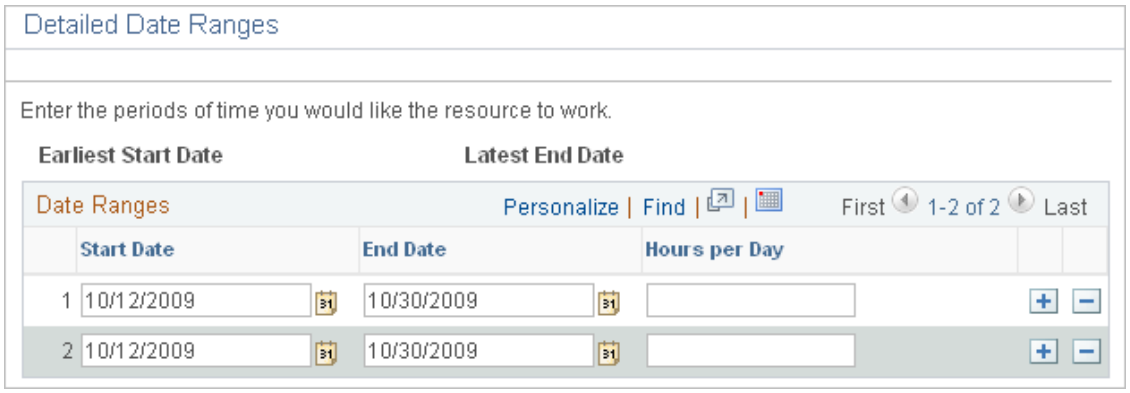
Multiple Date Ranges

Use the Express Search - Detailed Date Ranges page (RS_SO_DETAILDATES) to add multiple, non-contiguous date ranges to search criteria.

Navigation:

Click the **Use Multiple Date Ranges** link on the Express Search page.

This example illustrates the fields and controls on the Express Search - Detailed Date Ranges page. You can find definitions for the fields and controls later on this page.



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Use this page to enter additional start dates, end dates, and hours per day if you require the resource to work for multiple date ranges. If you are express searching to fill a generic resource placeholder in PeopleSoft Program Management, and the generic resource has multiple assignment schedule rows, the system automatically populates the date ranges and hours per day on this page.

Field or Control	Description
Earliest Start Date and **Latest End Date**	Displays the first start date and the last end date for all date ranges.
Start Date and **End Date**	Enter new rows as required to specify additional start and end dates for the project. Do not overlap the date ranges.
Hours per Day	Enter the number of hours per day for each date range that the resource is requested to work.

Specifying Qualifications

Select the Qualifications tab.

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

If you are express searching to fill a generic resource placeholder in PeopleSoft Program Management, the system populates the qualifications on the Express Search page from the Update Generic Resource Qualifications page in PeopleSoft Program Management. You can change the qualifications on the Express Search page.

Field or Control	Description
Profile	Click to access the Resource Qualifications - Select Qualification Profile page and select a predefined qualification profile from which the system populates qualifications.
List	Click to access the Resource Qualifications - Search for Qualifications page and look up specific qualifications.
Competency Tree	Click to access the Resource Qualifications - Select Competencies page and pick requirements from the Competency tree.

Profile

Access the Resource Qualifications - Select Qualification Profile page (click the **Profile** button on the Express Search page).

A qualification profile is a predefined template from which the system populates the Express Search page with the competencies and accomplishments that define a particular resource skill set. If you use qualification profiles, you will find these profiles to be the easiest, quickest, and most accurate method for defining skill requirements.

Field or Control	Description
Qualification Profile	Select a qualification profile that closely matches your requirements.

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Field or Control	Description
OK	Click to populate the **Qualifications** grid with the list of qualifications in the profile and return to the Express Search page. You can add or delete requirements from the **Qualifications** grid without affecting the qualification profile.

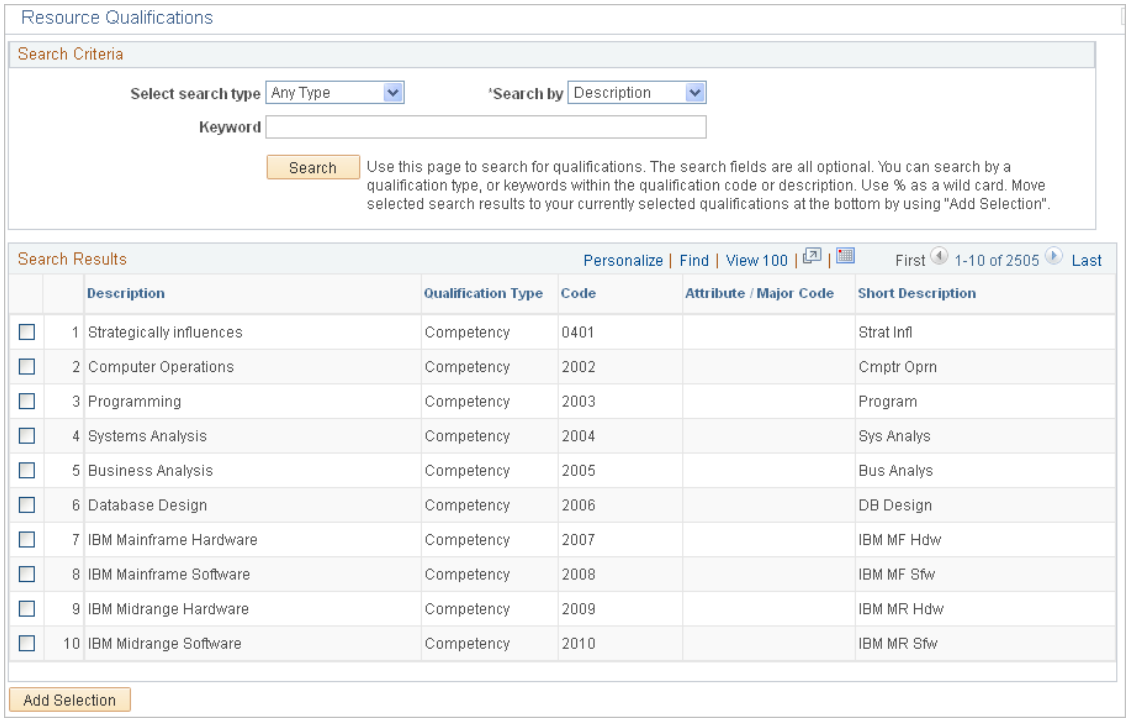
List

Use the Resource Qualifications - Select Qualification Profile page (RS_SELQUALPROFILE) to add qualifications to the search criteria from existing qualification profiles.

Navigation:

- Click the **Profile** button on the Express Search page.
- Click the **Profile** button on the Resource Requests page.

This example illustrates the fields and controls on the Resource Qualifications - Search for Qualifications page. You can find definitions for the fields and controls later on this page.



You can use this page to search for individual competencies and accomplishments that the resource should possess. The page supports iterative searching, enabling you to change the search criteria and perform more searches as needed to construct a complete list of desired qualifications.

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Field or Control	Description
Select search type	Select a qualification type as required to narrow the search results: *Any Type:* Returns all competencies, accomplishments, and flexible qualification factors. *Competency:* Returns only competencies. *Degree:* Returns only degree accomplishments. *Language:* Returns only language accomplishments. *License:* Returns only license and certificate accomplishments. *Membership:* Returns only professional membership accomplishments. *Other <Flexible Qualification Factor>:* Returns accomplishments for the flexible qualification factor that you define.
Search by	Specify the text to search if you enter a keyword. Values are: *Description:* Searches for a keyword within the qualification description. *Code:* Searches for a keyword within the qualification code.
Keyword	Enter a character, word, or phrase that you want to locate within the text of qualification descriptions or codes. The search returns all qualifications of the specified type that meet the keyword criteria. Leave the field blank to return all qualifications of the specified type. Enter a single character to return qualifications that begin with this letter or number. Use % as a wildcard to locate qualifications with a character or word anywhere in the keyword. For example, a **Keyword** value of *%J* and a **Search by** value of *Description* will return all qualifications that contain the letter J anywhere in the code.
Search	Click to search for qualifications based on the search criteria and display the **Search Results** grid.
Search Results	Displays qualifications that match the search criteria. Select the check box that corresponds to the desired qualification.
Add Selection	Click this button to move the selected qualifications to the **Currently Selected Qualifications** grid. This action temporarily holds the selected qualifications so that you can change the search criteria and perform additional searches.

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Field or Control	Description
Currently Selected Qualifications	Displays the qualifications that you already selected during this Express Search session using this page, the Resource Qualifications-Select Qualification Profile page, or the Resource Qualifications - Select Competencies page. Add or delete qualifications as necessary until the list is complete.
OK	Click to return to the Express Search page and populate the **Qualifications** group box with the selected competencies, accomplishments, and flexible qualification factors.

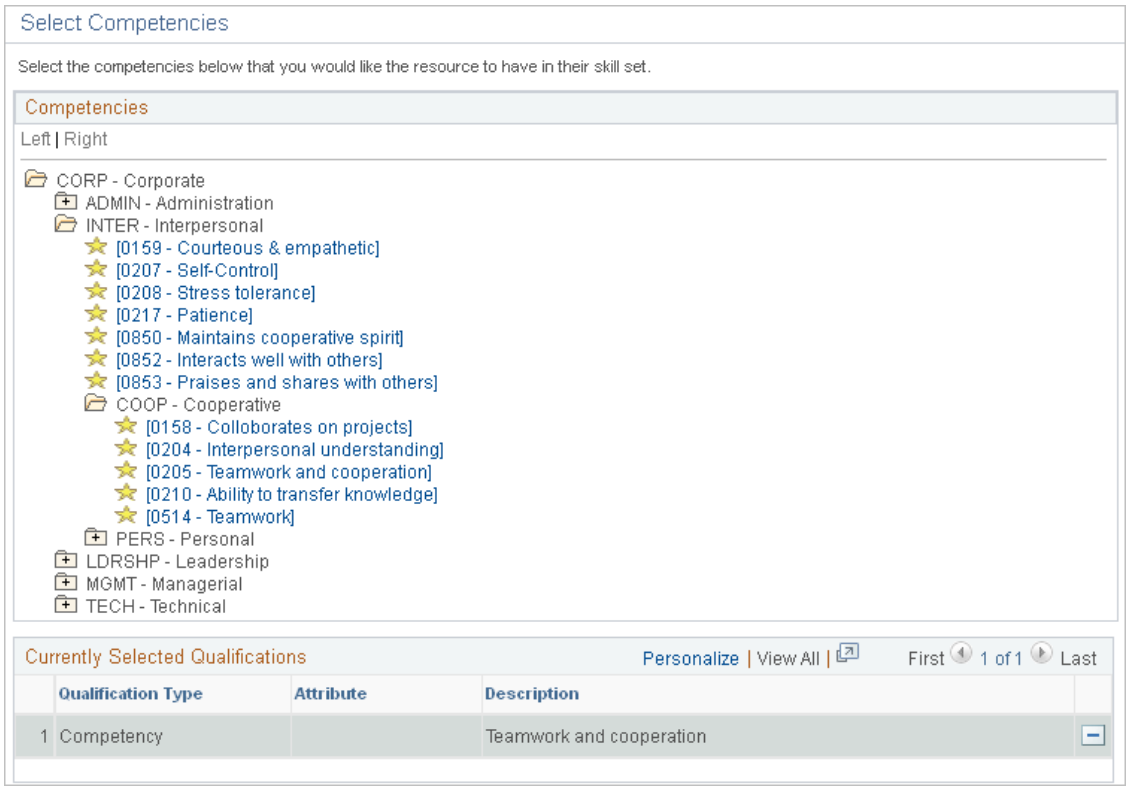
Competency Tree

Use the Resource Qualifications - Search for Qualifications page (RS_QUALIF_SRCH) to add qualifications to the search criteria from a list of qualifications.

Navigation:

- Click the **List** button on the Express Search page.
- Click the **List** button on the Resource Requests page.

This example illustrates the fields and controls on the Resource Qualifications - Select Competencies page. You can find definitions for the fields and controls later on this page.



The Competency tree, which appears in the **Competencies** group box, enables you to locate competencies that are grouped by competency type. This tool is useful if you are not familiar

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with the competencies in the organization because you can click intuitively labeled tree nodes and list the associated competencies. Then you can pick the appropriate competencies from the tree to add to the **Qualifications** grid.

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

Field or Control	Description
Competencies	Review competency categories and select the appropriate competency detail values. Selections appear in the **Currently Selected Qualifications** grid.
Currently Selected Qualifications	Displays the qualifications that you select during this Express Search session. Add or delete qualification rows as needed.

Qualifications

After you select qualifications from a qualification profile, list, and Competency tree and then return to the Express Search page, the qualifications appear in the **Qualifications** group box.

This example illustrates the fields and controls on the Qualifications grid on the Express Search page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Importance	Select how important it is that the resource possess the specified qualification. *Desired:* The Search Framework gives preference to resources who possess the qualification but does not exclude resources who do not possess the qualification. This is the default value. *Required:* Resources who do not possess this qualification are not returned in the search results.

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Field or Control	Description
Years of Work Experience	Select the number of years of experience that the resource should possess for this competency. You can select from *1 Year* to *9+ Years*. If you select an importance of *Desired* for this competency, the Search Framework gives preference to resources who possess the specified years of experience but does not exclude resources who do not meet the specified years. If you select an importance of *Required* for this competency, resources who do not meet the specified years of experience are not returned in the search results. This field appears only on rows that contain a qualification type of *Competency*.
Proficiency	Select the appropriate level of competency proficiency that the resource should possess for this project. If you select an importance of *Desired* for this competency, the Search Framework gives preference to resources with the proficiency level but does not exclude resources who do not meet the specified proficiency. If you select an importance of *Required* for this competency, resources who do not meet the specified proficiency are not returned in the search results. The default value is the highest level of competency available if you select the competency from the Competency tree or list. This field appears only on rows that contain a qualification type of *Competency*.
Details	Click to access the Qualification Detail: <Qualification> page and enter additional information about the qualification. The **Details** link appears only on rows for licenses, languages, and single-value flexible attributes because additional details exist that can be entered about these qualifications.

Qualification Details

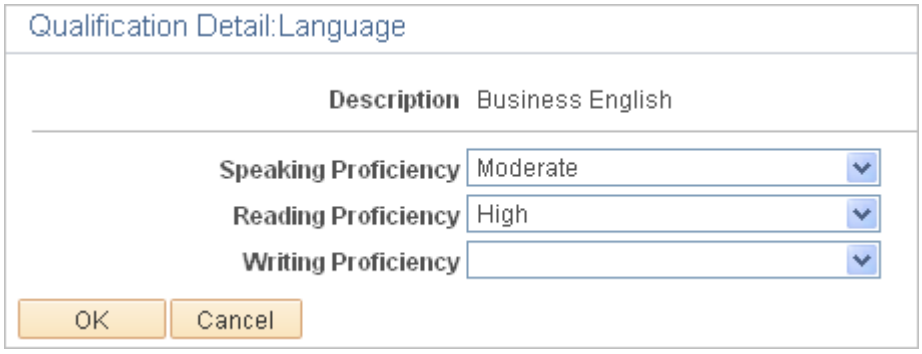
Use the Qualification Detail: <Qualification> page (RS_QUALIF_DETAILS) to specify additional details about requested license, language, or single-value flexible attributes.

Navigation:

Click **Details** in the **Qualifications** grid.

This example illustrates the fields and controls on the Qualification Detail: <Qualification> page. You can find definitions for the fields and controls later on this page.

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Use this page to enter additional information for licenses, languages, and single-value flexible attributes.

Field or Control	Description
Speaking Proficiency, Reading Proficiency, and **Writing Proficiency**	These fields appear only for language qualifications. Select a proficiency for each skill. Available values are *High, Moderate,* and *Low.*
Country and **State**	These fields appear only for license qualifications. Select the **Country** and **State** of the license.
Importance	This field appears only for single-value flexible attributes. Select *Desirable* or *Very* (desirable) as the level of importance that the resource possess the attribute value that appears in the **Description** field.
Only resources with one of the values for the attribute <attribute name> listed below will be considered	This field appears only for single-value flexible attributes. Select this option if you will only consider resources who have one of the listed values for this attribute.

Entering Keywords

Select the Keywords tab.

This example illustrates the fields and controls on the Keywords tab of the Express Search page. You can find definitions for the fields and controls later on this page.



Enter specific keywords here that you can use as a search string to compare against free-form text within the resource's work experience and resume document attachment on the resource profile. This field is best used in cases for which the competency information is insufficient or not consistently maintained, or when you want to specify skill requirements that are not listed as competencies or accomplishments.

If you are express searching to fill a generic resource placeholder in PeopleSoft Program Management, the system populates the keywords on the Express Search page from the

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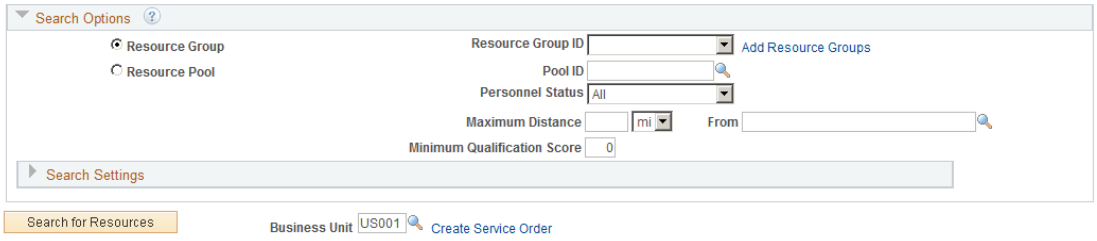
Update Generic Resource Qualifications page in PeopleSoft Program Management. You can change the keywords on the Express Search page.

Field or Control	Description
Keywords	Enter a word, phrase, or string of words in uppercase or lowercase. Use a comma to separate keywords. You can use logical connectors *AND* or *OR* to separate keywords. A comma behaves the same as the *OR* connector. If you use *AND* or *OR* connectors, you can use parenthesis to define precedence. When you run the Express Search, the system searches the resource's work experience and resume document attachment information for matches.

Specifying Search Options

Go to the **Search Options** collapsible group box on the Express Search page.

This example illustrates the fields and controls on the **Search Options** collapsible group box on the Express Search page. You can find definitions for the fields and controls later on this page.



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

Field or Control	Description
Resource Group and **Resource Pool**	Select to search within a resource group or a resource pool.
Resource Group ID and **Pool ID**	If you select to search by resource group, select from a list of active resource groups. If you select to search by resource pool, select from a list of active resource pools. The Express Search feature returns candidates only from the selected group or pool.
Add Resource Groups	Click this link to access the Resource Group Definition - Resource Groups page to define new groups, edit existing groups, or modify the list of active groups. See Establishing Resource Groups.

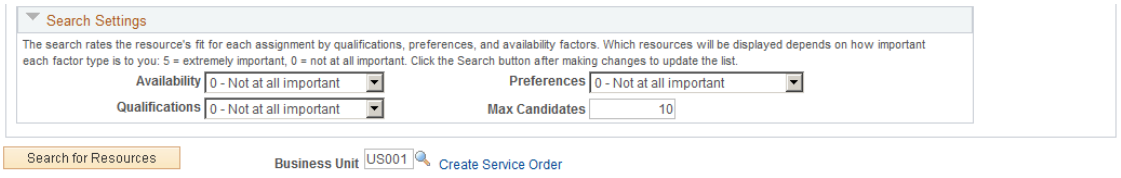
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Field or Control	Description
Personnel Status	This field appears if you allow non-employees—employees with a personnel status of *N*—to be established as resources. Specify a personnel status to narrow the search results if desired. Values are: *All:* Considers all types of resources in the search, regardless of their personnel status. *Employees:* Considers only employee resources in the search. *Non-Employees:* Considers only non-employee resources in the search.
Maximum Distance	Enter the distance in miles or kilometers from the selected location to perform a radius search. If a distance is entered, only candidates that live within the radius specified are returned in the results.
Minimum Qualification Score	Enter a minimum qualification score. The search results display only those resources with a qualification score greater than or equal to the minimum qualification score specified.

Specifying Search Settings

Go to the **Search Settings** collapsible group box on the Express Search page.

This example illustrates the fields and controls on the Search Settings collapsible group box on the Express Search page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Availability, Preferences, and **Qualifications**	Assign the relative priorities to the **Availability, Preferences,** and **Qualifications** factor family fit scores for this search session.

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Field or Control	Description
Max Candidates (maximum candidates)	Enter the maximum number of resource candidates to appear in the **Search Results** grid. When you perform the search, Search Framework retrieves all matching resources. This field determines the number of rows that appear at one time. The initial default value is *5*. Once you change the value, your most recent selection persists. The maximum value for this field is *50*. The total number of matching resource rows appears above the **Results** grid. You can navigate to the next or previous group of rows in the result set.
Search for Resources	Click to perform the search based on the specified project dates, qualifications, keywords, search options, and search settings.

Evaluating Search Results

Personnel resources who best match your requirements and search options appear in the **Search Results** group box.

This example illustrates the fields and controls in the **Search Results** grid on the Express Search page. You can find definitions for the fields and controls later on this page.



The order in which the resources appear in the grid is based on the resource's qualification ranking, which is a function of the resource qualification and preference scores that measure how well resources fit the specified qualifications and keywords that you specify during the Express Search session.

Select the check box next to a resource to move that resource into the **Considering** grid and temporarily hold the resource while you perform iterative searches.

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Field or Control	Description
Qual. (qualification)	Displays the score of how closely the resource's profile data matches the search criteria. This score is a composite of qualifications and preferences. Click the link to access the resource's Job Scorecard and view details about requirements that are included in the score for each qualification and assignment conflicts. See Job Scorecard for <Resource> Page.
Avail. (availability)	Displays the score of how closely the resource's schedule matches the search criteria. Click the link to access the Job Scorecard. See Job Scorecard for <Resource> Page.
Name	Click a resource's name to access the resource profile in a separate page.
Personnel Status	Displays the resource's personnel status if you allow non-employees to be established as resources.
Job Title	Displays the resource's current job as defined on the Update Employee Data - Employee Job page.
Rate	Displays the resource's bill rate and currency. This information is derived from the rate that is associated with the resource's employee ID on the Rates by Employee page in PeopleSoft Project Costing. If you do not define a bill rate for the employee ID, the system defines this value by the rate that is associated with the resource's job code, if one exists, on the Rates by Job Code page in PeopleSoft Project Costing. See PeopleSoft Project Costing: Defining Rates for Employees, Job Codes, and Project Roles.
Location	Displays the resource's location as specified on the Update Employee Data - Employee Job page.
Distance	If Maximum Distance was entered, this field shows the distance the candidate lives from the selected location
Supervisor	Displays the name of the resource's manager as specified on the Update Employee Data - Employee Job page.

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Field or Control	Description
Assign	Click this button to access the Assign Resource page and create an assignment for the selected resource. Save or cancel the assignment to return to this page. When you save the assignment and return to this page, the **Assign** button is no longer available for the assigned resource. Assignments that you create from the Express Search page have a task category that is specified on the Installation Options - Resource Management page. If you are express searching to fill a generic resource placeholder in PeopleSoft Program Management, you do not access the Assign Resource page when you click **Assign.** Instead, a message appears stating that the generic resource will be replaced by the named resource. If Assignment Approval workflow is activated; this message indicates that the generic resource will be replaced by the named resource after the assignment is approved. Click **OK** for the system to create the assignment and return to the Resources page in PeopleSoft Program Management. Click **Cancel** to cancel the action and return to the Express Search page.
	Click to access the resource's monthly schedule and view schedule details in a new page.
Consider	Select a resource and click this button to move the selected resources to the **Considering** grid to temporarily hold them while you continue searching. You can change search criteria and perform as many iterative searches as required during an Express Search session. Continue to place each viable candidate in the **Considering** grid until you are ready to make a decision.
Business Unit	Displays the Business Unit as defined on the User Preferences page. You can specify a different Business Unit. The Business Unit that you specify here will be considered whenever a Service Order is created from the Express Search page. The system will display an error message if you do not specify a Business Unit.
Create Service Order	Click this link to create a service order and populate it with the requirement dates, qualifications, and keywords that you specify on the Express Search page. This link transfers you to the Resource Request page on the new service order. If any resources are in the **Considering** grid, they appear on the resource request as recommended resources. This link is not visible if you are express searching to fill a generic resource placeholder in PeopleSoft Program Management.

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Considering Resource Candidates

Resources appear in the **Considering** grid if you select the resource in the **Search Results** grid and click the **Consider** button. This feature enables you to keep one or more resources in consideration as you adjust search criteria and perform iterative searches. The fit scores for each resource in the **Considering** grid are recalculated for each subsequent search that you perform in this Express Search session to reflect the current search criteria.

This example illustrates the fields and controls in the **Considering** grid on the Express Search page.



In the **Considering** grid, you can:

- Delete rows for the resources who are no longer under consideration.
- Select the **Assign** button in a resource row to create an assignment for the resource. Save or cancel the assignment to return to this page.
- Select **Create Service Order** to create a service order and include the resources in this grid as recommendations for the resource request on the service order.

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Requesting Resources Using Service Orders

Understanding Service Orders

In PeopleSoft Resource Management, you can request services for a customer by using a service order. The service order form captures information about the engagement and includes one or more resource requests. The resource request section of a service order captures data that is needed to find qualified resources to work on the engagement. Each resource request can have a unique set of skill and date requirements. You can request multiple resources on a single resource request, provided that the same requirements apply for each. Resource Matching uses the specifications in the service order and resource request to search for available, qualified resources.

This section lists prerequisites and discusses:

- The service order form.
- Service order and resource request status.
- Service order templates.
- Service order workflow.

Prerequisites

Complete these steps before you work with service orders:

- Set up customers and contacts.

  See PeopleSoft Order to Cash Common Information: Understanding the Primary Customer Roles, PeopleSoft Order to Cash Common Information: Understanding Contact Information.

- Define service order priorities.

  See Defining Service Order Priorities.

- (Optional) Define service order default values.

  See Defining Service Order Defaults.

- (Optional) Create qualification profiles.

  See Creating Qualification Profiles.

- (Optional) Create service order templates.

  See Creating, Updating, and Deleting Service Order Templates.

The Service Order Form

The service order form consists of two tabs—Resource Requests and Order Summary. The Resource Requests tab contains the details of each resource request on the order. The Order Summary tab contains header information, a summary of the requests, and links to other service order options.

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By creating a service order, you can:

- Capture customer resource requirements that you can fulfill at a later time.
- Capture customer resource requirements that a different user can fulfill.
- Provide an audit trail of customer orders that you can analyze to track metrics.

When you first access the service order form, you specify the dates, hours per day, and qualifications or keywords that Resource Matching will use to find the best resources for the job. You can define project team requirements by creating a resource request for each project role, and you can request multiple resources to fulfill a role.

When you are ready to finalize the order, enter additional details about the project and customer, and identify the organization and person that are responsible for fulfilling the order.

As the order proceeds through the approval and fulfillment processes, use the form to:

- Review fulfillment progress and assigned resources.
- Capture additional information or customer requirements for the order.
- Review an order for completeness and understand the requirements before processing.

Service Order and Resource Request Status

Service order status indicates where the order is in the fulfillment process. The system automatically updates status based on the fulfillment progress of the associated resource requests; you can change the status manually at any time.

This table lists the service order status values that specific actions or processes trigger:

Service Order Status	Triggering Action or Process
Draft	Click the **Save for Later** button on the Resource Requests or Order Summary tab. Use this option to save a service order to return to at a later time if all of the required fields are not entered or if the order is not ready for submission.
New	Click the **Save and Submit** button on the Order Summary tab. Use this option to save a new service order and submit it to the person who is responsible for staffing to begin the fulfillment process.
Open	Manually change the status to *Open*. Use this status to indicate that you no longer consider an order to be in *New* status (for example, if you have reviewed it but have not yet made assignments).
In Process	Create an assignment in any status for at least one resource request on this service order.
Canceled	Cancel all resource requests on a service order. This action automatically cancels the service order. Use this status to indicate that the customer canceled their order for services. **Note:** You cannot cancel a service order that is in a *Draft* status. You can delete a *Draft* service order using the Delete Service Order page.

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Service Order Status	Triggering Action or Process
Closed	• Create assignments with a status of *Assigned* to fulfill all of the resource request quantities of this service order. • Cancel the last open resource request on a service order that contains other resource requests that are in a *Closed* status. This action automatically closes the service order. • Update all the Open service order lines to Closed status. Assignments in the status other than Assign, Canceled, or Completed are updated to Canceled status. If an assignment end date occurs prior to closing the service order, the assignment changes to Completed status. After a service order is closed, the related fields on the service order are grayed out; users cannot delete the closed line.

A resource request status indicates where the individual request is in the fulfillment process. The system updates the status automatically based on fulfillment progress; you can manually change the status at any time.

This table lists the resource request status values that specific activities or processes trigger:

Resource Request Status	Triggering Action or Process
Open	Create a new resource request.
Canceled	• Manually change the resource request status to *Canceled.* • Cancel the service order for this resource request if no assignments are associated with the request. This action automatically cancels the resource request. • Remove or cancel a generic resource that is associated with this resource request from the Resource page or Manage Generic Resources page in PeopleSoft Program Management. This action automatically cancels the resource request.
Closed	• Create assignments with a status of *Assigned* to fulfill the quantity of resources who are requested on this resource request. • Manually change the resource request status to *Closed.*

Service Order Templates

Service order templates reduce the amount of work that is required to create a service order by pre-populating many of the field values that are needed to create a new service order. You can create one or more standardized service order templates to use when similar or repetitive projects must be staffed.

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Service order templates populate fields on both service order tabs—Resource Requests and Order Summary. A template may also include multiple resource request lines.

Information that is stored on service order templates automatically populates new service orders when you use this option. You can then modify any default values or enter additional information as needed.

Service Order Workflow

Workflow options for service order processing or notification messages are specified for the business unit during implementation. If workflow options are enabled for the business unit, these actions may occur:

- When a service order is submitted, a notification of a new service order is routed to the worklist of the person who is identified on the service order as responsible for staffing the order.
- If the person who is responsible for staffing the order changes, a notification of the service order is routed to the worklist of the new responsible person. An email notification of the changed service order is also sent to the new responsible person.
- Each time the service order status changes, the system sends an email notification to the person who is responsible for staffing the order (unless that is the person who made the change) and to the interested parties who are listed on a service order.

Creating and Modifying Service Orders

This topic discusses how to create and modify service orders.

Pages Used to Create and Modify Service Orders

Page Name	Definition Name	Usage
Resource Requests Page	RS_SO_REQUESTS	Specify the required dates and keywords to use when searching for resources to fulfill service orders.
Resource Qualifications - Select Qualification Profile Page	RS_SELQUALPROFILE	Specify resource qualifications from existing qualification profiles. Resource Requests Page
Resource Qualifications - Search for Qualifications	RS_QUALIF_SRCH	Specify resource qualifications from a list of qualifications. Resource Requests Page
Resource Qualifications - Select Competencies	RS_SO_COMP	Pick resource qualifications from the Competency tree. Resource Requests Page
Qualification Detail: <Qualification> Page	RS_QUALIF_DETAILS	Specify additional details about requested license, language, or single-value flexible attributes. Specifying Qualifications
Order Summary Page	RS_SO_SUMMARY	Enter customer, project, and organizational information for service orders.

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Page Name	Definition Name	Usage
Service Order Owning Organization - Select an Organization Page	RS_ORGTREESEL_SEC	Select organizations that are responsible for delivering services. Defining Owning Organizations
Service Order - Interested Parties Page	RS_SO_INT_PARTY	Enter people to be notified if service order statuses change and workflow is enabled. Accessing Additional Service Order Options
Service Order - Service Order History Page	RS_SO_HIST_SEC	Review or add comments that are specific to service orders. Accessing Additional Service Order Options
Customer Information Page	RS_CUST_INFO1	View customer profiles. Modify PeopleSoft Resource Management-specific information on customer profiles.
Contact Profile Page	RS_CONTACT_INFO1	View information about customer contacts. Order Summary Page
Service Order - Additional General Information Page	RS_SO_SUMM_MORE	Enter desired values for flexible resource attributes that are specific to the resource request line. Defining Owning Organizations
Service Order - Detailed Date Ranges Page	RS_SO_DETAILDATES	Define additional date ranges if the specified request is for resources to work in noncontiguous intervals.
Service Order - Location and Contact Details Page	RS_REQ_LOCCNTC_SEC	Enter location and contact information that is specific to the resource request line.
Service Order - Recommend Resources Page	RS_SO_RECOMMEND	Recommend resources for the specified resource request.

Resource Requests Page

Use the Resource Requests page (RS_SO_REQUESTS) to specify the required dates and keywords to use when searching for resources to fulfill service orders.

Navigation:

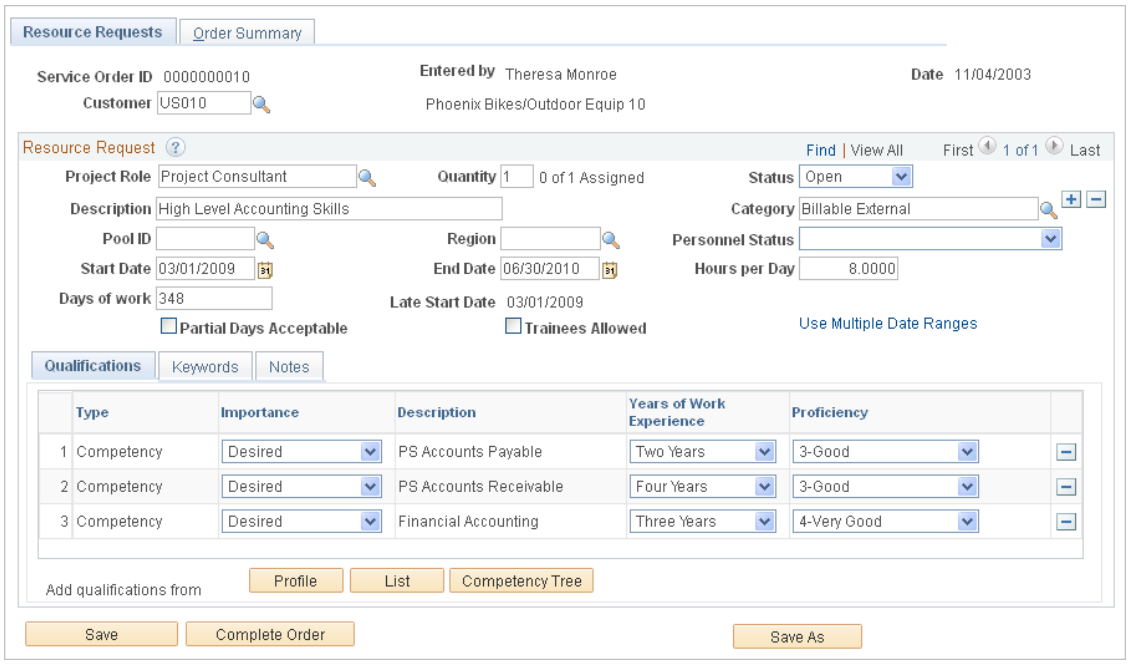
Resource Management, and then **Request Resources**, and then **Create or Review Service Order**, and then **Resource Requests**

Use the Service Order-Keyword Search page (RS_SERVICE_ORDER) to perform free-form keyword searches for the Service Order component. This functionality enables you to search across multiple attributes of the service order. You can enter phrases, words, or partial strings to perform your search.

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For more information about **Keyword Search**, see Application Fundamentals: Understanding Keyword Search within Components.

This example illustrates the fields and controls on the Resource Requests page. You can find definitions for the fields and controls later on this page.



The service order business unit that you select on the Add a New Value page when you first enter this component controls:

- Workflow.
- The list of projects and customers that you can select for the order.

The default values that appear on the Resource Request page are based on service order default values and the origin of the service order. For example:

- If you create a service order from the Express Search feature, the specified dates, hours per day, qualifications, and keyword values appear on the Resource Requests page.

  In addition, resources who are in the **Considering** grid on the Express Search page when the service order is created are associated with this request as recommended resources.
- If you create a service order from the Manage Generic Resources page in PeopleSoft Program Management, the values for primary project role, quantity, description, hours per day, and date range appear on the Resource Requests page.

  Order description and project appear on the Order Summary page.

> **Note**
>
> If an SR is created for the SO Line in sPro, the fields in the RM Resource Request page will be grayed out if sPro is installed with the Find External resource option. Users can modify the page if either of the values is false even though an SR is created for the SO Line in sPro.

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Your ability to edit fields or select certain field values is based on your user role and the origin of the service order.

Field or Control	Description
Service Order	Displays the service order ID that you entered or that the system auto-generated. Auto-generated values appear as *NEXT* until you save the assignment. **Note:** All service order IDs and service order template IDs must be unique.
Entered by and **Date**	Displays the name of the user who creates the order and the system date on which the user created it.
Customer	Select the customer who is requesting the services. The customer must have a valid customer ID. **Note:** If PeopleSoft Contracts is not installed or if no project is entered on the service order, the customer prompt table shows a list of customers who are associated with the SetID for the service order business unit. If you enter a customer ID first and then enter a project ID, and that project is not affiliated with the customer through a contract, the system issues a warning message at save time. This warning reminds you that the selected customer is not associated with the project that was selected for the service order.

Resource Request

Field or Control	Description
Project Role	Enter the position that is to be filled on this resource request. If the resource request is created in PeopleSoft Program Management, the primary project role populates this field and is not editable. You must enter a project role if you want to create assignments in a status of *Assigned* or *Reserved* from the Staffing Workbench for this resource request.

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Field or Control	Description
Quantity	Enter the total number of resources who are required to fulfill the resource request. This is the number of resources that you require on the same dates with the same skill set. This field is not editable if the value is populated from PeopleSoft Program Management. After you submit a service order, the fulfillment progress appears beside the **Quantity** field. For example, if you request two resources, upon submission the fulfillment progress appears as *0 of 2 Assigned;* the system updates this value when you assign resources. **Note:** The number of unfulfilled position or quantity of a SO line is sent to the Positions field on the SR in sPro. Users can increase or decrease the quantity for an SO in Resource Management that is already populated in sPro. The change in quantity is updated to the SR in sPro so that the **Position** field value is in sync with the quantity value in the SO. If the quantity decreases to 0, the SR is closed in sPro.
Status	Displays where the individual resource request is in the fulfillment process. The system automatically updates the status based on fulfillment progress; you can change it manually at any time. When you submit a service order, the resource request status becomes *Open.* This field is visible only after you submit a service order. See Service Order and Resource Request Status.
Description	Enter a description of the resource request in 30 or fewer characters. This description is used in other parts of the system to identify the request.

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Field or Control	Description
Category	Enter the task category for assignments that you create for this resource request. The default value is based on the origin of the service order, as follows: • If the service order is created directly in PeopleSoft Resource Management, the default value in this field is based on the **Default Task Category for Assignments** field on the Installation Options - Resource Management page. • If the service order originates from the Manage Generic Resources page in PeopleSoft Program Management, the default value in this field is based on the **Category** field for this generic resource on the Resource Detail page in Program Management. You can modify the default task category to any category that is specified for assignments on the Task Categories page. This field is required to submit a service order for fulfillment. **Note:** If you change the default task category value on the Installation Options - Resource Management page, the system does not update the task category value on existing service orders.
Pool ID	Enter the resource pool from which to search for resources, or leave the field blank to consider resources from all pools.
Region	Enter the region from which to search for resources or leave the field blank to consider resources from all regions. **Note:** Search results on the Staffing Workbench will vary depending on the search option selected.
Personnel Status	Select *Employee* or *Non-Employee* to search for resources with a specific personnel status, or leave the field blank to consider resources with either status.

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Field or Control	Description
Start Date and **End Date**	Enter the dates that the assignment is expected to start and end. Click the calendar next to the start and end dates to select those dates. You can enter the start date and days of work and the system calculates the end date. If you require the resources for multiple, noncontiguous date ranges, you can leave these fields blank and click the **Use Multiple Date Ranges** link to enter date information. When you return to this page after entering multiple date ranges on the Service Order - Detailed Date Ranges page, the **Start Date** and **End Date** fields display the first start date and last end date for all date ranges. Start date, end date, days, and hours of work per day are required to submit a service order for fulfillment. The resource request start date, end date, days, and hours of work per day are used by Resource Matching to find available resources.
Hours per Day	Enter the number of hours per day that the resource is requested to work. This field is blank if you require the resource to work for multiple date ranges.
Days of work	Enter the number of work days that are required to complete the job. If you enter start and end dates but not the days of work, the default value is the number of work days between the start and end dates. You can use dates and days of work to indicate a date range that is longer than the estimated days of work. For example, you can specify start and end dates that are three months apart and enter days of work as *30*, indicating that the 30-day job can be completed at any time during those three months.
Late Start Date	Displays the latest date that the resource can start the assignment and still complete it by the end date. The system calculates this field based on the end date and days of work values.
Partial Days Acceptable	Click if part-time work is acceptable on this project. This option affects Resource Matching because it indicates that the resource is not required to have a full day available every day to be considered a strong fit for the request. As such, Resource Matching evaluates part-time resources, and the Availability fit scores of partially available resources are higher than they would be if you did not select this check box.
Trainees Allowed	Click if trainees are acceptable on this project. Typically these are resources who observe for evaluation purposes the resource who is assigned to a project. This field is used for informational purposes only.

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Field or Control	Description
Use Multiple Date Ranges and **View Multiple Date Ranges**	Click the **Use Multiple Date Ranges** link to access the Service Order - Detailed Date Ranges page and enter multiple date ranges and hours per day for this resource request. When you enter multiple date ranges and return to the Resource Requests page or Order Summary page, the link name changes to **View Multiple Date Ranges.** See Service Order - Detailed Date Ranges Page.
Complete Order	After you specify qualifications, keywords, and notes, click the **Complete Order** button to proceed to the Order Summary page to enter project, customer, and organizational details.

Specifying Qualifications and Notes

Select the Qualifications tab on the Resource Request page to specify the desired accomplishments, competencies, and flexible qualification factors for the requested resource. You can specify qualifications based on a predefined qualification profile, look up specific qualifications from a list, or select competencies from the Competency tree. You must specify at least one keyword or one qualification on every resource request in the order. Resource Matching uses qualifications to find qualified resources.

Qualifications that appear as default values on service order resource requests that are created directly in PeopleSoft Resource Management are from the qualification profile, if one exists, of the specified role.

If you create a service order from the Manage Generic Resources page in PeopleSoft Program Management, the system populates the qualifications and notes on the resource request from the Update Generic Resource Qualifications page for the generic resource in PeopleSoft Program Management. You can change the qualifications on the resource request. Qualification changes that you make on the resource request are not reflected on the Update Generic Resource Qualifications page.

Select the **Notes** tab to enter additional comments for this request. These comments are used for information only.

Specify qualifications on the resource request as you do on the Express Search page.

See Specifying Qualifications.

Specifying Keywords

Select the Keywords tab on the Resource Request page to specify keywords as resource requirements.

The system administrator creates and routinely refreshes a search index of work experience and resume document information for all available resources. The index is used to calculate the individual Work Experience and Resume factor fit scores, which are included in the calculation of the Qualifications factor family fit score.

Enter specific keywords here that you can use as a search string to compare against free-form text within the resource's work experience and resume document attachment on the resource profile. This option is best used in cases where the competency information is insufficient or

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not consistently maintained, or when you want to specify skill requirements that are not listed as competencies or accomplishments.

If you create a service order from the Manage Generic Resources page in PeopleSoft Program Management, the system populates the keywords on the resource request from the Update Generic Resource Qualifications page for the generic resource in Program Management. You can change the keywords on the resource request. Keyword changes that you make on the resource request are not reflected on the Update Generic Resource Qualifications page.

Specify keywords on the resource request as you do on the Express Search page.

See Entering Keywords.

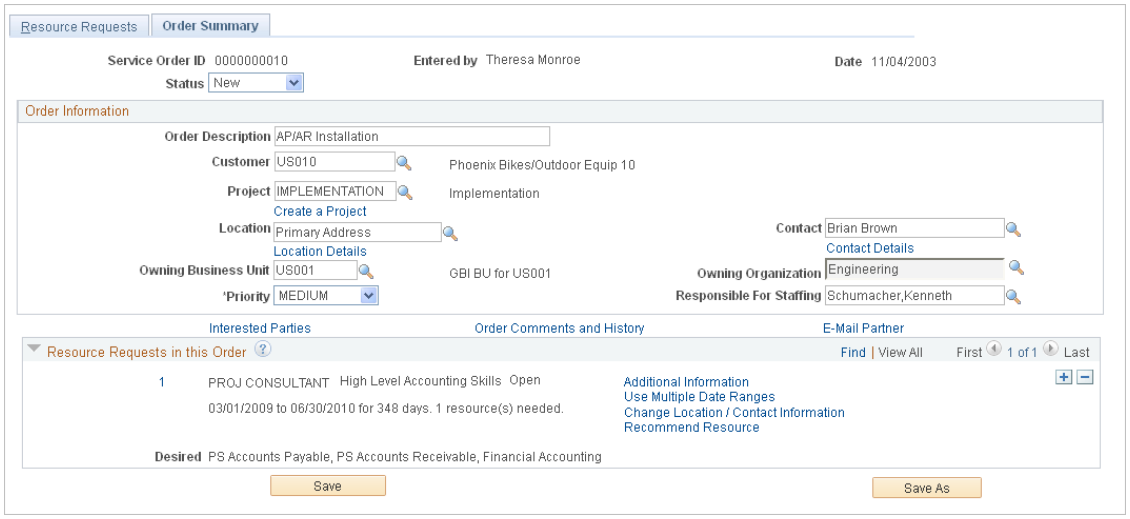
Order Summary Page

Use the Order Summary page (RS_SO_SUMMARY) to enter customer, project, and organizational information for service orders.

Navigation:

- Select the Order Summary tab on the Resource Requests page.
- Click **Complete Order** on the Resource Requests page.

This example illustrates the fields and controls on the Order Summary page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Status	This field is visible only after you submit a service order. It indicates where this service order is in the process of being fulfilled: *Canceled, Closed, Draft, In Process, New,* or *Open.* The system automatically updates status based on fulfillment progress; you can change the status manually at any time. When you submit a service order, the status becomes *New.* See Service Order and Resource Request Status. If you change the status, and service order workflow is activated for the business unit, upon saving the service order the system sends an email notification message to the person who is responsible for staffing the order (unless that is the person who made the change) and to interested parties who are listed on the service order.

Order Information

Field or Control	Description
Order Description	Enter a description of the service order in 60 characters or fewer. This description becomes the project description if you create a project from this page.
Customer	Enter the customer who is associated with this service order, if applicable. You can enter only one customer per service order. Values appear from the Resource Requests page and can be changed.
Project	Enter a valid project ID. This field is not editable if the value is populated from the Manage Generic Resources page in PeopleSoft Program Management. You must enter a project if you want to create assignments in a status of *Assigned* or *Reserved* from the Staffing Workbench for this resource request.

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Field or Control	Description
Create a Project	Click to access a page that contains **Project, Start Date,** and **End Date** fields On this page enter: • A new project ID, or accept the default value of *NEXT* to create a project with the next available project ID. • Enter project start and end dates that at least span the date ranges of resource requests on this order. The current date is the default value in both fields. Click **OK** to save the project and return to the Order Summary page. The new project ID value appears in the **Project** field on the service order. The service order business unit and description become the business unit and description on the project.
Location	Enter the customer's location where the work takes place.
Location Details	Click to access the customer profile and view or update housing and travel information, dress code, and whether the customer allows trainees on assignments.
Contact	Enter the customer's contact person for this order.
Contact Details	Click to access the contact profile and view customer contact information, such as telephone number and email address.
Owning Business Unit	Enter the human resource (HR) business unit of the owning organization for the service order. Your selection determines the organizational unit tree from which you can select the owning organization for this service order. This field is required to submit a service order for fulfillment. Define the **Owning Business Unit** default value for each user on the Service Order Defaults for <User> page.

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Field or Control	Description
Owning Organization	Click the **Select an Organization** icon to access the Service Order Owning Organization - Select an Organization page. Here you select the organization that is responsible for delivering the services that are requested on the service order. When working to fulfill the order, users can direct the search to resources within the owning organization that is specified on the order. **Note:** You cannot type the Owning Organization field value; you must select it from the organizational unit tree on the Service Order Owning Organization - Select an Organization page. This field is required to submit a service order for fulfillment. Define the **Owning Organization** default value for each user on the Service Order Defaults for <User> page. See Defining Owning Organizations.
Priority	Enter the importance or urgency of the service order. The default priority value is established at implementation. Priority is used for information and reporting purposes only.
Responsible For Staffing	Enter the individual who is responsible for staffing the service order. When the service order is submitted, the resource requests on the order appear on the Staffing Workbench - Fulfill Orders page for the user who is identified as responsible for staffing the order. If service order workflow is activated for the business unit, the service order is routed to this person's worklist when the order is submitted. This field is required to submit a service order for fulfillment. Define the **Responsible For Staffing** default value for each user on the Service Order Defaults for <User> page.
Interested Parties	Click to access the Service Order - Interested Parties page. See Accessing Additional Service Order Options.
Order Comments and History	Click to access the Service Order - Service Order History page. See Accessing Additional Service Order Options.
E-Mail Partner	Click to access the E-Mail Partner page. See Accessing Additional Service Order Options.

Resource Requests in this Order

This collapsible scroll area displays the project role, description, start and end dates, number of days and resources needed, status, and qualifications for each resource request on the

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order. You can add a resource request on this page and then return to the Resource Requests page to enter the detailed requirements.

Field or Control	Description
Additional Information	Click to access the Service Order - Additional General Information page. See Service Order - Additional General Information Page.
Change Location/Contact Information	Click to access the Service Order - Location and Contact Details page. See Service Order - Location and Contact Details Page.
Recommend Resource	Click to access the Service Order - Recommend Resources page. See Service Order - Recommend Resources Page.
Generic Resource Name: <resource name>	Click to access the Resources page in PeopleSoft Program Management and view the project resource list. This link appears if the resource request is associated with a generic resource placeholder in PeopleSoft Program Management.

Defining Owning Organizations

You can select the owning organization by running a basic or advanced search.

Selecting Owning Organizations Using a Basic Search

Use the Service Order Owning Organization - Select an Organization page (RS_ORGTREESEL_SEC) to select organizations that are responsible for delivering services.

Navigation:

Search for an **Owning Organization** on the Order Summary page. Click the **Advanced Search** link or the **Basic Search** link.

This example illustrates the fields and controls on the Service Order Owning Organization - Select an Organization basic search page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Select an Organization	Expand the tree as needed to identify the desired default owning organization, and then click the organization. You can select any level on the tree to serve as the default owning organization.
Selected Organization	Displays the name of the organization selected. You can select only one owning organization.
Advanced Search	Click to access the Service Order Owning Organization - Select an Organization advanced search page.
OK	Click to select the organization and return to the previous page.

Selecting Owning Organizations Using an Advanced Search

Access the Service Order Owning Organization - Select an Organization advanced search page (search for an Owning Organization on the Order Summary page).

This example illustrates the fields and controls on the Service Order Owning Organization - Select an Organization advanced search page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Find Organizations Like	Enter all or part of an organization name using a wildcard—% or *—if necessary. The search is case sensitive. Enter only % or * to return a list of all organizations for the specified business unit.
Find	Click to generate the search. The organizations that match the search criteria appear in the **Select an Organization** grid.
Sel (select)	Select the desired default owning organization.
Select	Click for the selected organization name to appear as the selected organization on this page.

Accessing Additional Service Order Options

The service order form provides links to additional tools to assist you in managing service orders. This section discusses:

- Notifying interested parties of service order status changes.
- Entering order comments or view history.
- Emailing partners.

Notifying Interested Parties

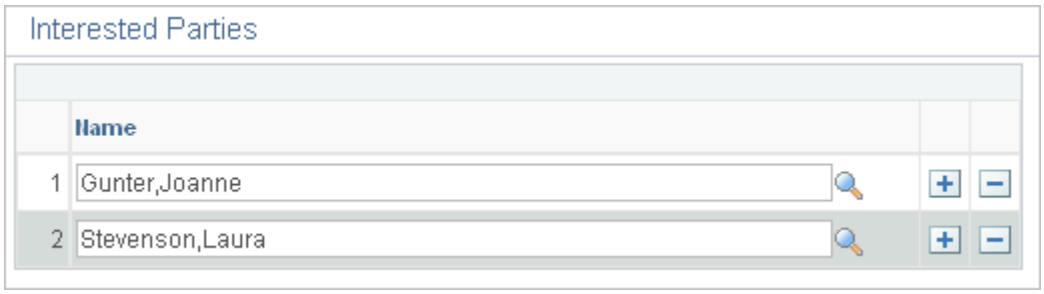
Use the Service Order - Interested Parties page (RS_SO_INT_PARTY) to enter people to be notified if service order statuses change and workflow is enabled.

Navigation:

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Click **Interested Parties** on the Order Summary page.

This example illustrates the fields and controls on the Service Order - Interested Parties page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Name	Add or remove individuals to notify of any changes to the service order's status if workflow is enabled.

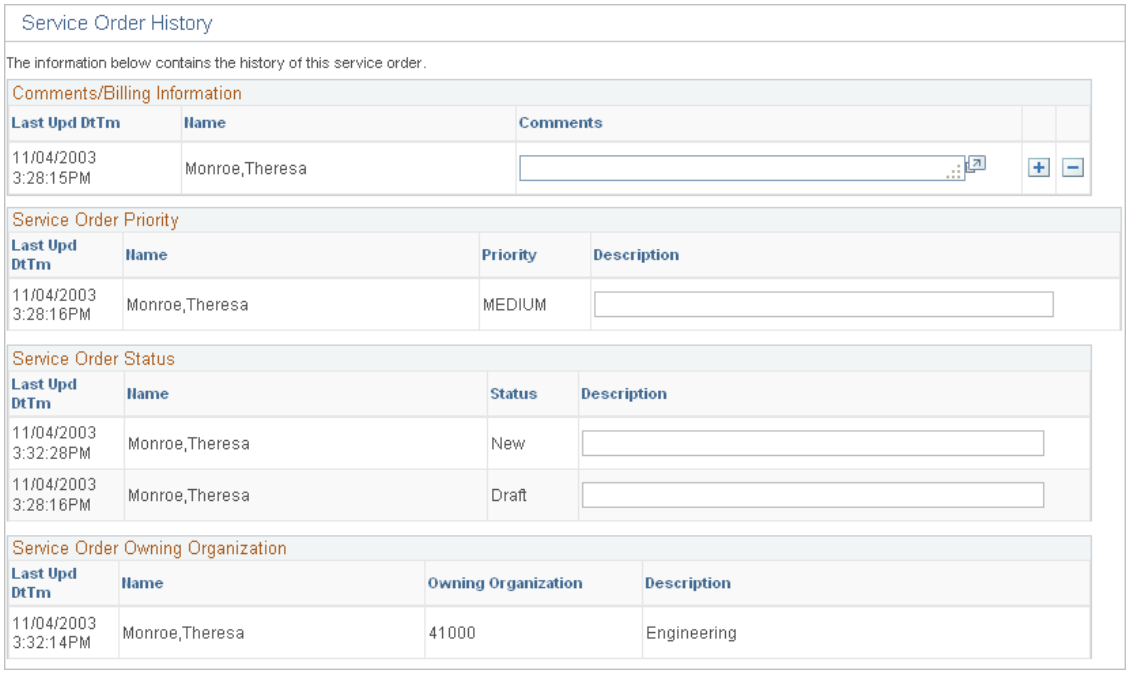
Entering Order Comments and Viewing History

Use the Service Order - Service Order History page (RS_SO_HIST_SEC) to review or add comments that are specific to service orders.

Navigation:

Click **Order Comments and History** on the Order Summary page.

This example illustrates the fields and controls on the Service Order - Service Order History page. You can find definitions for the fields and controls later on this page.



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Use this page to record and track comments about this service order and review the history of changes to priority, status, and owning organization.

Field or Control	Description
Last Upd Dt Tm (last updated date and time)	Displays the date and time of the update.
Name	Displays the name of the user who entered the update.
Comments/Billing Information	View, add, or delete comments or billing information.
Service Order Priority	View the history of service order priority changes and, if required, add further explanation for the changes.
Service Order Status	View the history of service order status changes and, if required, add further explanation for the changes.
Service Order Owning Organization	View the history of service order owning organization changes.

Emailing Partners

Access the E-mail Partner page.

Field or Control	Description
Email ID	Enter an email address to email the service order to an external partner to request assistance in fulfilling the resource request. The partner does not have to be classified as an external staffing source in PeopleSoft Resource Management. Once you enter the email address and click **OK,** the system creates the memo and includes information about all of the resource requests on the service order within the text of the message. To outsource a single resource request, click **Save As** to copy the original service order and delete all non-relevant resource requests before sending the email.

Service Order - Additional General Information Page

Use the Service Order - Additional General Information page (RS_SO_SUMM_MORE) to enter desired values for flexible resource attributes that are specific to the resource request line.

Navigation:

Click **Additional Information** for a specific resource request on the Order Summary page.

This example illustrates the fields and controls on the Service Order - Additional General Information page.

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Enter values for any flexible service order attributes or flexible preference factors that are established for your organization. Define optional flexible attributes during implementation.

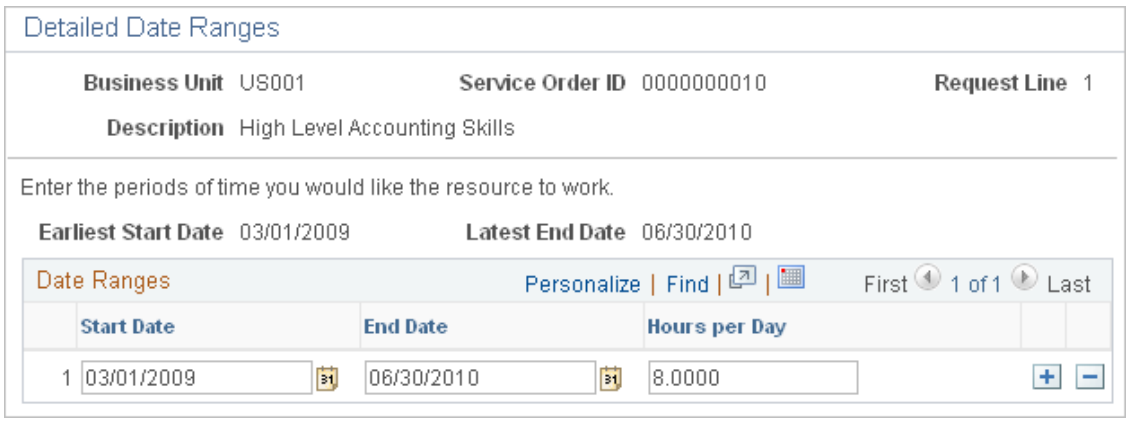
Service Order - Detailed Date Ranges Page

Use the Service Order - Detailed Date Ranges page (RS_SO_DETAILDATES) to define additional date ranges if the specified request is for resources to work in noncontiguous intervals.

Navigation:

Click **Use Multiple Date Ranges** or **View Multiple Date Ranges** for a specific resource request on the Resource Requests page or Order Summary page.

This example illustrates the fields and controls on the Service Order - Detailed Date Ranges page. You can find definitions for the fields and controls later on this page.



Use this page to define additional date ranges if the request is for resources to work in noncontiguous intervals. For example, if the date range that is specified on the resource request is January 1 to January 31 and you also need the resource from March 1 to March 31, add a row and enter the second date range. You must also enter the number of hours required per day for each date range.

Field or Control	Description
Start Date and **End Date**	Enter the start and end date for each unique date range on this resource request. Add additional rows as required.
Hours per Day	Enter the number of hours required of the resource per day for each date range listed.

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Service Order - Location and Contact Details Page

Use the Service Order - Location and Contact Details page (RS_REQ_LOCCNTC_SEC) to enter location and contact information that is specific to the resource request line.

Navigation:

Click **Change Location/Contact Information** for a specific resource request on the Order Summary page.

Use this page to select a different location or contact that only applies to this individual resource request line.

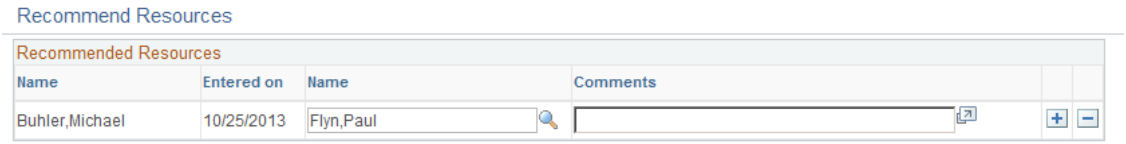
Service Order - Recommend Resources Page

Use the Service Order - Recommend Resources page (RS_SO_RECOMMEND) to recommend resources for the specified resource request.

Navigation:

Click **Recommend Resources** for a specific resource request on the Order Summary page.

This example illustrates the fields and controls on the Service Order - Recommend Resources page. You can find definitions for the fields and controls later on this page.



Use this page to recommend resources for this resource request. Resource Matching evaluates recommendations when it calculates fit scores. You can also view recommended resources on the Staffing Workbench - Fulfill Orders tab to assist you in making staffing decisions.

Resources who were previously recommended for this resource request appear on the page.

Field or Control	Description
Name and **Entered on**	Displays the name of the person who is making the recommendation and the date on which that person entered it.
Name and **Comments**	Enter a resource to recommend for this resource request and add comments to explain the recommendation. Add rows as necessary to recommend additional resources.

The system sends a worklist item to the resource as a notification that the resource is recommended for a resource request.

Click the **-** sign if you want to withdraw the recommended resource. A notification will be sent that the recommended resource has been withdrawn.

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Saving Service Orders

You can save service orders in three ways in PeopleSoft Resource Management:

Field or Control	Description
Save for Later	Click to save a service order in a *Draft* status if the service order is not ready for submission. The only field values that are required to save a draft service order are service order ID, business unit, task category, and hours per day. You can open, update, and click **Save for Later** as many times as required. This option is available only until you submit the service order.
Save and Submit	Click to save a service order and submit it to the person who is responsible for staffing the order so that the person can begin the fulfillment process. When you submit the service order, the resource requests on the order appear on the Staffing Workbench - Fulfill Orders page for the user who is identified as responsible for staffing the order. If service order workflow is activated for the business unit, the service order is routed to this person's worklist when you submit the order. To submit a service order it must have an owning business unit, owning organization, and person responsible for staffing, and each resource request must have a start date, end date, days of work, task category, and hours per day. You must also specify at least one keyword or one qualification on every resource request in the order. This button is available only until you submit the service order; after that, this button is replaced with the **Save** button.
Save	Click to save a service order after you modify it. If you changed the service order status and service order workflow is activated for the business unit, the system sends an email notification to the person who is responsible for staffing the order (unless that is the person who made the change) and to the interested parties who are listed on a service order. This option is available only after you submit the service order.
Save As	Click to save the resource request and service order information to a new service order number. This speeds the entry of a new service order that contains similar data as the original. When the save is complete, the new service order opens in a new page. This option is available only after you submit the service order.

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Map RM sPro Experience Table

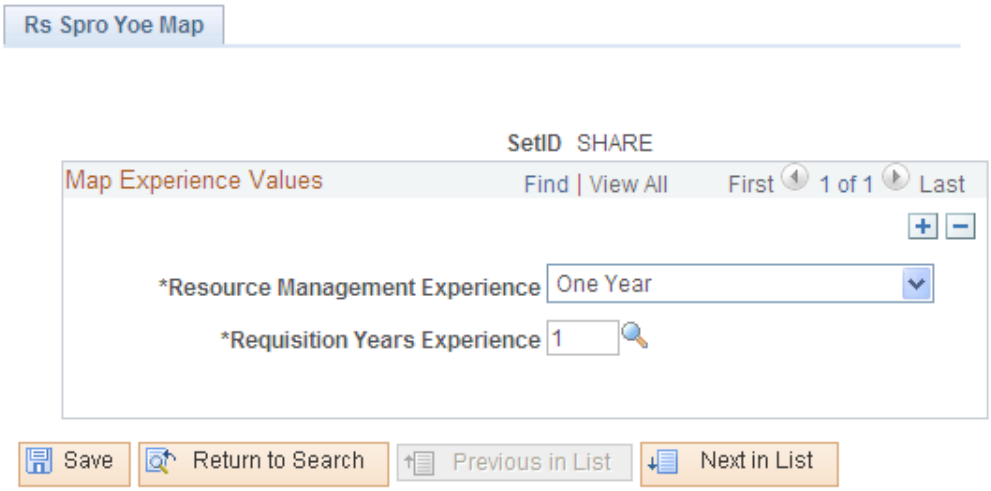
This new mapping page enables users to map their experiences in the Resource Management experience table with the sPro experience table. The mapping occurs between the **Resource Management Experience** field and the **Years Experience** field in sPro.

Access the Rs spro Yoe Map Page.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Resource Management**, and then **Setup RM sPro Experience Map**

This example illustrates the fields and controls on the Resource Management – Rs spro Yoe Map page.



Field or Control	Description
Resource Management Experience	The **Resource Management Experience** field lists all the values available within the **Years of Work Experience** field in the Resource Request page.

Creating Service Orders from Templates

This topic discusses how to create service orders from templates.

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Page Used to Create Service Orders from Templates

Page Name	Definition Name	Usage
Create Service Order From Template Page	RS_SO_PICKTMPLT	Create new service orders using field values from predefined templates.

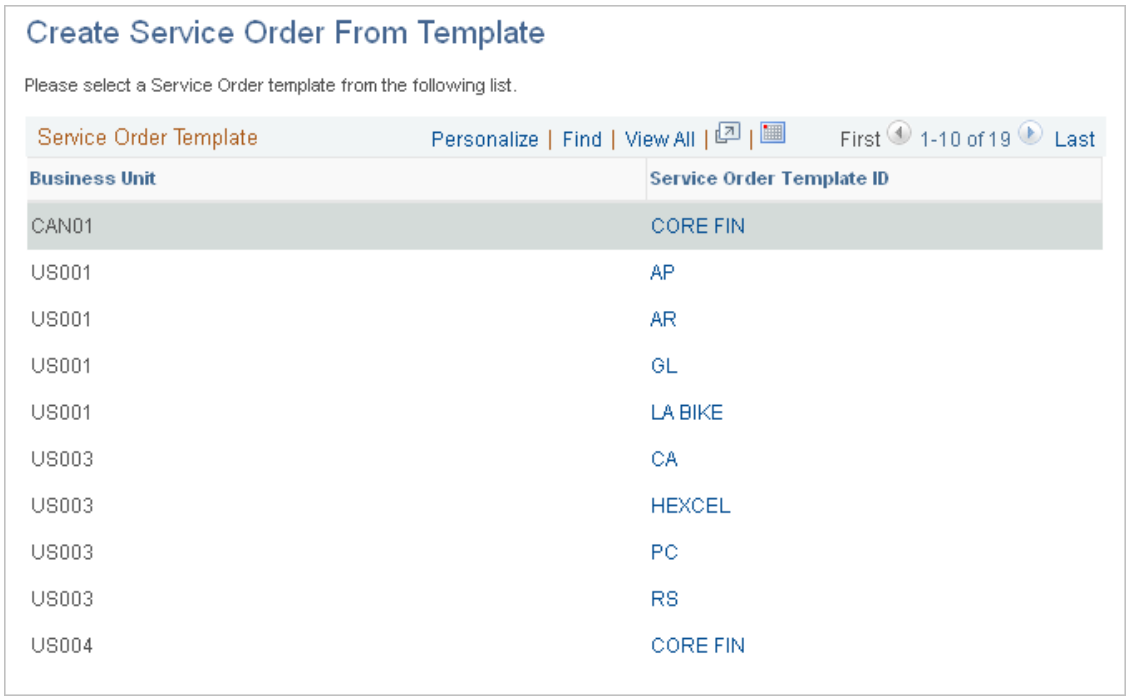
Create Service Order From Template Page

Use the Create Service Order From Template page (RS_SO_PICKTMPLT) to create new service orders using field values from predefined templates.

Navigation:

Resource Management, and then **Request Resources**, and then **Create Svc Order from Template**, and then **Create Service Order From Template**

This example illustrates the fields and controls on the Create Service Order From Template page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Business Unit	Displays the business unit that is associated with the template.
Service Order Template ID	Select the template to populate a new service order form. The system copies all of the information from the template to the service order. You can modify the new service order field values without affecting the template.

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Viewing and Managing Service Orders and Resource Requests

PeopleSoft Resource Management provides additional tools to help you view and manage service orders. This topic discusses how to view and manage Service Orders and Resource Requests.

Pages Used to View and Manage Service Orders and Resource Requests

Page Name	Definition Name	Usage
Order Summary Page	RS_SO_SUMMARY	View assigned resources for resource requests and drill down to assignments or resource profiles.
Delete Service Order Page	RS_SO_DELETE	Delete service orders.

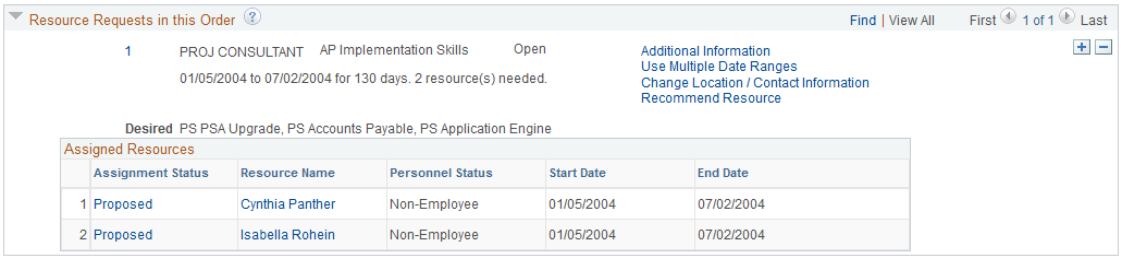
Order Summary Page

Use the Order Summary page (RS_SO_SUMMARY) to view assigned resources for resource requests and drill down to assignments or resource profiles.

Navigation:

Resource Management, and then **Request Resources**, and then **Create or Review Service Order**, and then **Order Summary**

This example illustrates the fields and controls on the Resource Requests in this Order collapsible scroll area on the Order Summary page. You can find definitions for the fields and controls later on this page.



In the **Assigned Resources** grid, you can view the resources who are assigned to this resource request and drill down to the assignment and the resource profile.

Field or Control	Description
Assignment Status	Click the status to access the Assign Resource page and view the details of the assignment.
Resource Name	Click the resource name to view the resource's profile in a new page. See Understanding Resource Profile Maintenance.
Personnel Status	Displays the resource's personnel status of *Employee* or *Non-Employee.*

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Field or Control	Description
Start Date and **End Date**	Displays the start and end dates of the assignment. If multiple date ranges are indicated on the assignment, these columns display the earliest start and latest end dates of those indicated date ranges.

Order Summary Page

Use the Order Summary page (RS_SO_SUMMARY) to view assigned resources for resource requests and drill down to assignments or resource profiles.

Navigation:

Resource Management, and then **Request Resources**, and then **Create or Review Service Order**, and then **Order Summary**

> **Note**
>
> The service order appears in read-only mode if you do not have security access to update service orders.

On this page you can view (not update) service order, resource request, and assignment information.

Delete Service Order Page

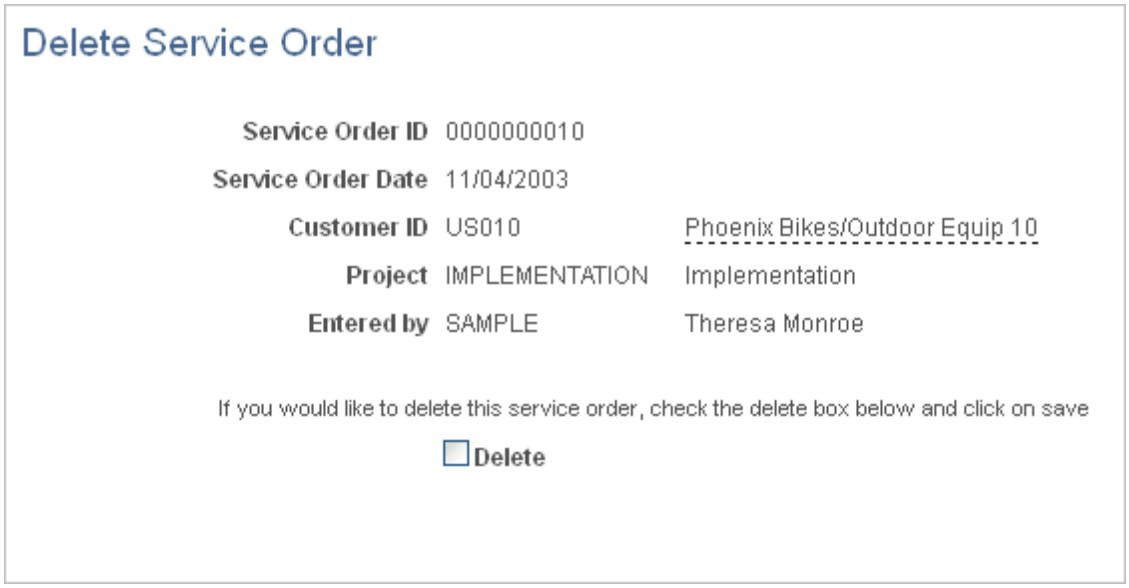
Use the Delete Service Order page (RS_SO_DELETE) to delete service orders.

Navigation:

Resource Management, and then **Request Resources**, and then **Delete Service Order**, and then **Delete Service Order**

This example illustrates the fields and controls on the Delete Service Order page. You can find definitions for the fields and controls later on this page.

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You can delete service orders only in a status of *New* or *Draft.*

> **Warning**
>
> Only system administrators should have permission to delete service orders. Delete a service order with caution. PeopleSoft Resource Management does *not* provide any embedded checking mechanisms to make sure that there are no assignments for a service order before you delete it, resulting workflow to notify the service order owner that the deletion occurred, checking mechanisms to find bids or recommendations that may be associated with the service order, or workflow to notify the owner or interested parties that a bid or recommendation is no longer valid because the service order was deleted.

Field or Control	Description
Customer ID	Displays the ID and name of the customer who is associated with this service order.
Project	Displays the project ID and description that is associated with this service order.
Entered by	Displays the user ID and name of the person who entered the service order.
Delete	Select to delete this service order.
Save	Deletes the service order. A message appears confirming that the service order was deleted. Click **OK** to close the dialog box.

Use the folder navigation to return to the Delete Service Order search page to delete another service order.

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Fulfilling Service Orders

Understanding Service Order Fulfillment Using the Staffing Workbench

You can use the Staffing Workbench - Fulfill Orders page to manage the entire service order fulfillment process. Here you can review the current queue of orders that are assigned to you for fulfillment, identify those orders that require your attention, and perform a variety of tasks to find qualified resources to fulfill them. On the Fulfill Orders page, you can:

- View the current queue of outstanding resource requests to fulfill.
  - View resource requests in a list or Gantt chart format.
  - Dynamically filter the requests on the page by their fulfillment progress.
  - Select one or more resource requests to process, and filter the view to display only those requests.
  - Add resource requests to the workbench that are assigned to another staffing coordinator.
- Search for resources to fulfill requests.
  - Perform a search using Resource Matching.

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

    You can specify the search settings, such as the relative importance of factor family fit scores and the maximum number of candidates to review for Resource Matching to use when looking for resources who fit the requirements on a resource request.
  - View resources who are recommended or who have submitted bids for resource requests.
  - Select resources to appear as candidates for a resource request in the work space.
  - If you use PeopleSoft Services Procurement, initiate a service requisition to search for third-party service providers to fulfill a resource request.
- Evaluate candidates and select resources to assign, consider, interview, propose, or reserve for specific resource requests.

Workbench Tools Used to Evaluate Candidates

The Staffing Workbench provides easy access to the tools that you need to determine the best resources for open resource requests. From the workbench, you can:

- Evaluate resource qualifications and preferences.

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The resource's Qualification fit score appears in the work space with a link to the Job Scorecard page. You can access the scorecard to review the accomplishments, competencies, preferences, or flexible qualification factors that are included in the fit score calculation for this combination of resource and resource request. The scorecard indicates if the resource is qualified, partially qualified, or not qualified to meet each requested accomplishment, competency, or flexible qualification factor. For any requested competency, the scorecard also displays the resource's interest level, if available, providing insight into the resource's preferences.

- Evaluate resource availability.

  The resource's Availability fit score also links to the Job Scorecard page. The scorecard identifies existing tasks on the resource's schedule that conflict with the resource request dates. You can review the conflicting dates, hours, and tasks, drill down to make modifications as needed, and return to the workbench. From the workbench, you can also view a list of the resource's existing assignments, or open the resource's schedule to view or modify details about scheduled assignments or appointments.

- Review resource profiles.

  Clicking a resource name opens the resource's profile. You can review the resource's general information, work experience, qualifications, and preferences.

- View and modify service orders or resource requests.

  If you can't find a suitable resource for a resource request, you can open and modify the service order or resource request from a link on the workbench, save your changes, and return to the workbench.

Specifying Staffing Workbench and Service Order Fulfillment Options

To specify workbench and service order fulfillment options, use the Staffing Workbench Options component (RS_MYWKBNCH_OPT).

Pages Used to Specify Staffing Workbench and Service Order Fulfillment Options

Page Name	Definition Name	Usage
My Workbench Options - Workbench Page	RS_MYWKBNCH_OPT	Select default resource groups from which you staff resources.
Resource Group Definition - Resource Groups Page	RS_RESOURCE_GROUPS	Add or modify resource groups and select active resource groups. My Workbench Options - Workbench Page
My Workbench Options - Orders Page	RS_MYWKBNCHREQ_OPT	Select the default search scope option for the Staffing Workbench - Fulfill Orders page.

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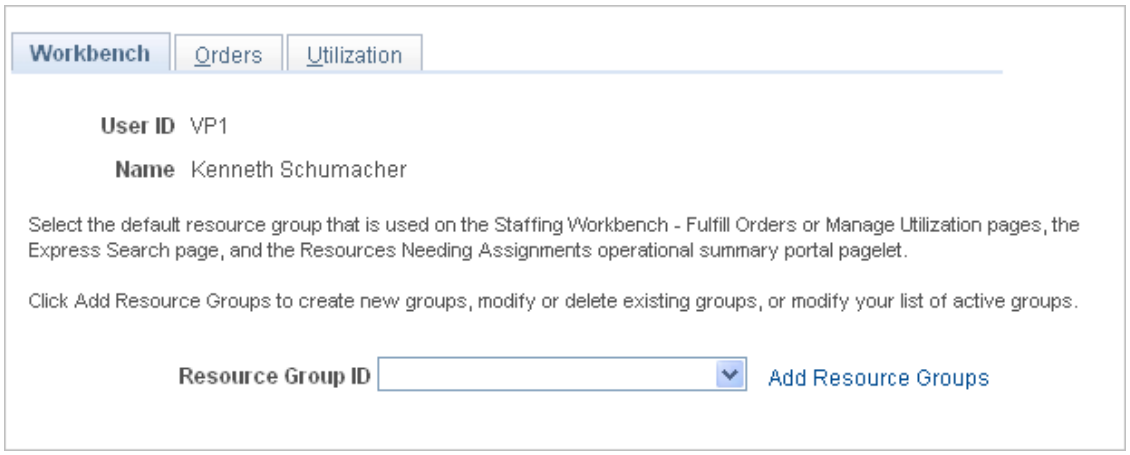
My Workbench Options - Workbench Page

Use the My Workbench Options - Workbench page (RS_MYWKBNCH_OPT) to select default resource groups from which you staff resources.

Navigation:

Resource Management, and then **Define User Options**, and then **My Workbench Options**, and then **Workbench**

This example illustrates the fields and controls on the My Workbench Options - Workbench page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Resource Group ID	Enter the default resource group from which you staff resource requests. The list of available resource groups contains the groups that you designate as active. Your selection appears as the default resource group that is used on the Staffing Workbench - Fulfill Orders page, the Express Search page, and the Resources Needing Assignments operational summary portal pagelet. It is also used as the default resource group that appears in the **Resources** work space when you enter the Staffing Workbench - Manage Utilization page. You can select different resource groups on the Staffing Workbench or the Express Search page when you search for resources or resource requests.
Add Resource Groups	Click this link to access the Resource Group Definition - Resource Groups page and modify your list of active groups, edit an existing group, or create a new group. See Establishing Resource Groups.

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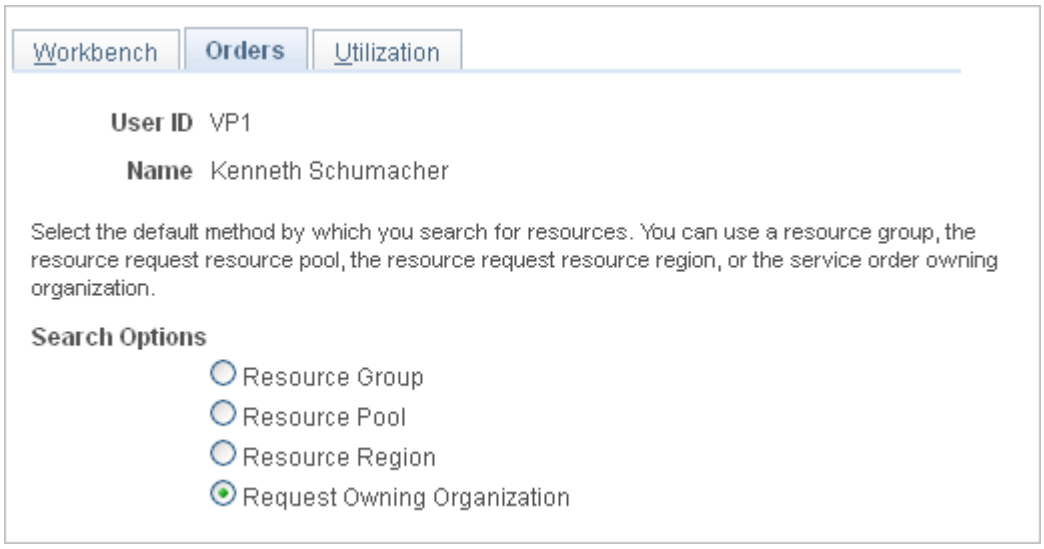
My Workbench Options - Orders Page

Use the My Workbench Options - Orders page (RS_MYWKBNCHREQ_OPT) to select the default search scope option for the Staffing Workbench - Fulfill Orders page.

Navigation:

Resource Management, and then **Define User Options**, and then **My Workbench Options**, and then **Orders**

This example illustrates the fields and controls on the My Workbench Options - Orders page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Search Options	Select the default method for identifying the group of resources to match against the resource requests that appear on the Staffing Workbench - Fulfill Orders page. Available options are: **Resource Group:** Select to match resource requests against the default resource group that you select on the My Workbench Options - Workbench page. **Request Resource Pool:** Select to match resource requests against the resource pool that is specified on the resource requests. **Resource Region:** Select to match resource requests against the region that is specified on the resource requests. **Request Owning Organization:** Select to match resources against the owning organization that is specified on the service order.

You can override these default search settings on the Staffing Workbench - Fulfill Orders page when you search for resources.

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> **Note**
>
> The My Workbench Options - Utilization options page is discussed in a subsequent topic.

Related Topics

- My Workbench Options - Utilization Page
  Use the My Workbench Options - Utilization page (RS_MYWKBNCHRSC_OPT) to select options for the Staffing Workbench - Manage Utilization page such as the grid sort order, number of days before the end date that an assignment is treated as ending, minimum utilization percentage, optimal utilization ratio, and chart appearance.

Fulfilling Open Resource Requests

This topic discusses how to fulfill open resource requests.

Pages Used to Fulfill Open Resource Requests

Page Name	Definition Name	Usage
Staffing Workbench - Fulfill Orders Page	RS_MYSERVICEORDERS	Find resources to fulfill open resource requests.
Staffing Workbench - Add Request to List Page	RS_SCWB_RRSRCH_SEC	Populate the workbench with resource requests for service orders that are not assigned to you. Filtering and Expanding the Resource Request List
Select Resource - Resource Search Page	RS_RESRC_SRCHM_SEC	Directly associate resources with resource requests on the Staffing Workbench - Fulfill Orders page. Searching for Resources
Staffing Changes Confirmation Page	RS_SCWB_CONF_MSG	View actions and modify default values before committing changes. Add comments for assignment activity. Confirming Actions
Update Confirmation Page	RS_SCWB_CONF_MSG	Confirm actions. Confirming Actions

Staffing Workbench - Fulfill Orders Page

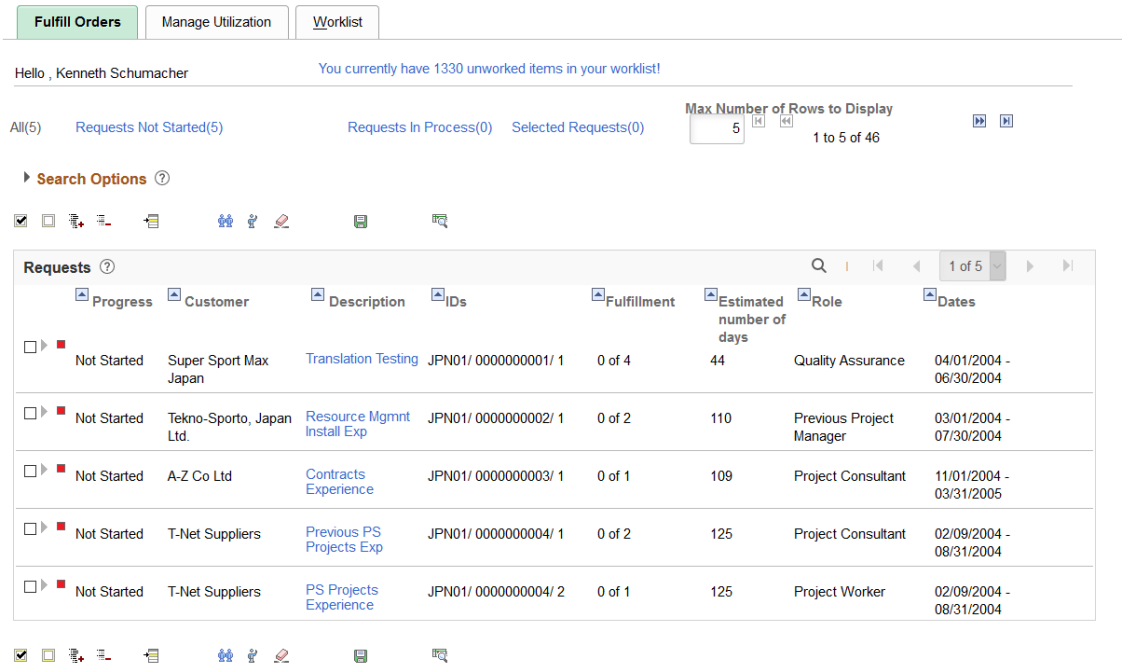
Use the Staffing Workbench - Fulfill Orders page (RS_MYSERVICEORDERS) to find resources to fulfill open resource requests.

Navigation:

Resource Management, and then **Staffing Workbench**, and then **Fulfill Orders**

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This example illustrates the fields and controls on the Staffing Workbench - Fulfill Orders page. You can find definitions for the fields and controls later on this page.



The Staffing Workbench - Fulfill Orders page is the starting point for managing service order fulfillment. From here you can:

- Perform a search using Resource Matching.
- Initiate a service requisition in PeopleSoft Services Procurement to fulfill a resource request with a contractor.
- View resources who are recommended or who have submitted bids for resource requests.
- View resources who are already associated with the resource requests.
- Search for specific resources to evaluate their fit scores for a generic resource request.
- Drill down to details about service orders, resource requests, resource profiles, assignments, and schedules to enable you to finalize staffing decisions.

Field or Control	Description
Hello , <User Name>	Displays the name that is associated with the user ID.
You currently have <number> unworked items in your worklist!	Click this link to access the Worklist page and view or process items that are routed from PeopleSoft workflow. **Note:** The number of unworked items on the Worklist page does not necessarily correspond to the number of unfulfilled resource requests on the Fulfill Orders page. See Understanding the Worklist.

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Field or Control	Description
Max Number of Rows to Display	Select the maximum number of rows you want the system to display at a time. The system defaults this value to *50,* but users can change this to another number. The system displays the number of rows returned. Use the scroll buttons to scroll through the search results.

Requests

Upon entering the workbench, the scroll area displays a summary-level, collapsed row for each open resource request on a service order that is assigned to you. For each request, you can view:

- Visual indicators that depict how close the current date is to the requested start date for requests.
- Resource request fulfillment progress.
- Summary information about the service order and resource request.

Visual Indicators

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

Field or Control	Description
	A green circle indicates that the corresponding resource request starts in more than two weeks.
	An inverted yellow triangle indicates that the corresponding resource request starts within two weeks.
	A red square indicates that the corresponding resource request start date has passed.

Resource Request Summary Rows

Rows in the **Requests** scroll area are collapsed when you enter the page. These rows provide resource request summary information.

Field or Control	Description
 or	Click to expand or collapse individual resource request rows. Expanded rows display information about resources who are associated with a resource request.
	Click to sort the list of resource requests by the corresponding column heading in ascending or descending order.

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Field or Control	Description
Progress	Displays resource request fulfillment progress. *In Process:* At least one assignment—in any status—exists for this resource request. *Not Started:* No assignments exist for this resource request.
Customer	Displays the customer name that appears on the service order that is associated with this resource request.
Description	Click the resource request description link to access the Order Summary page to view or modify the service order or resource request. To return to the Staffing Workbench, click **Save** on the Order Summary or Resource Requests page, or click **Return to Staffing Workbench.** See Creating and Modifying Service Orders.
IDs	Displays a concatenation of the business unit ID, service order ID, and resource request line ID.
Fulfillment	Displays the number of requested resources that are fulfilled, and the total number of resources requested. **Note:** For a requested resource to be treated as fulfilled, the resource assignment status must be *Assigned.* If you use PeopleSoft Services Procurement, and if a service requisition exists for this resource request, the requested quantity and number of requests that are filled or canceled in Services Procurement appear in this column.
Days	Displays the number of work days required to complete the project.
Role	Displays the project role that is specified on the resource request.
Dates	Displays the start and end dates of the request. If multiple date ranges are indicated on the request, this column displays the earliest start and latest end dates of those indicated date ranges.

Resource Rows

When you expand resource request summary rows, they display basic information about resources who are associated with the resource request, the resource's factor fit scores for the request, the resource's assignment status, and a link to the assignment, if applicable.

A resource may appear in the expanded row if:

- An assignment for the resource exists for the resource request.
- You are considering the resource for the resource request.
- Resource Matching returns the resource in a search.
- You retrieve bids and recommendation for the resource request.

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- You add this resource to the resource request row.

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

Filtering and Expanding the Resource Request List

You can choose a filter at the top of the Staffing Workbench - Fulfill Orders page to view subsets of the unfulfilled resource requests that are assigned to you. Filters control the resource requests that appear in the **Requests** scroll area or the request schedule Gantt chart. When you select a filter that limits the list of requests, such as requests that are not started, the requests that do not meet the filter criteria do not appear in the list or chart. The number of resource requests that are included in a filter appears in parenthesis next to the filter name.

Field or Control	Description
All	Click to view all open resource requests that are associated with a service order that is assigned to you and has a value of *New, Open,* or *In Process.* The **All <number>** link is disabled while you are in this filter.
Requests Not Started	Click to view a subset of resource requests that do not have any resource assignments. The **Requests Not Started <number>** link is disabled while you are in this filter.
Requests In Process	Click to view a subset of resource requests that have at least one resource assignment in any status. The **Requests In Process <number>** link is disabled while you are in this filter.
Selected Requests	Click after selecting the check box beside the resource requests that you want to appear in the **Requests** scroll area. To remove another resource request from this filter, deselect the request check box and click **Selected Requests** again.

You can use the toolbar—located just above and below the **Requests** scroll area—to expand all request rows so that you can view or take action on resources who are associated with the requests. You can also locate a resource request that is assigned to a different user to add to your work space, and toggle between a grid and chart format for viewing resource requests.

Field or Control	Description
	Click **Select All** to select all resource requests that appear in the work space.
	Click **Deselect All** to deselect all resource requests that appear in the work space.
	Click **Expand All** to expand all resource request summary rows in the work space.
	Click **Collapse All** to collapse all resource request summary rows in the work space.

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Field or Control	Description
	Click **Add Request to List** to access the Staffing Workbench - Add Request to List page and locate and populate the work space with resource requests that are assigned to a different user to fulfill.

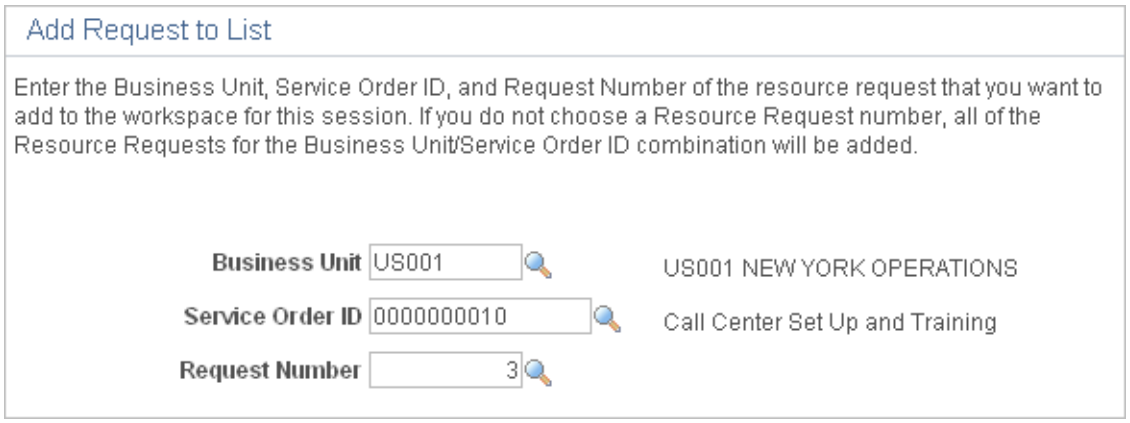
When you enter the Staffing Workbench - Fulfill Orders page, the list of resource requests appears in a grid format. You can switch to the chart format at any time and then switch back to the grid format. The same resource requests appear regardless of the view that you select. If you select a different filter while the chart view is active, the resource requests in the chart view change to reflect the new filter.

Field or Control	Description
	Click **Request Schedule Gantt Chart** to view the list of resource requests in a chart view. The Request Schedule Gantt chart displays the same resource requests as the grid format, which are open requests—all requests, requests not started, requests in process, or selected requests—that appear in the active filter. This icon appears only if the active view is the Requests grid.
	Click **Requests Grid** to view the list of resource requests in a grid format in the **Requests** scroll area. This is the default view for the Staffing Workbench - Fulfill Orders page. This icon appears only if the active view is the Request Schedule Gantt chart.

Add Resource Request to Grid

Click **Add Request to List** to search for specific resource requests to populate the **Requests** scroll area.

This example illustrates the fields and controls on the Staffing Workbench - Add Request to List page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Business Unit	Enter the business unit of the service order that you want to locate. You must enter the business unit before you enter other values; it determines the valid service order IDs.
Service Order ID	Enter the service order. You can search for the service order by the person who is responsible for staffing it, customer ID or name, description, project, service order ID or status, or by the user ID of the individual who created the order.
Request Number	Enter a request number, or click the adjacent Lookup icon to view and select a resource request. If you don't select a value, the system adds all open resource requests that are associated with the selected business unit–service order combination to the **Requests** scroll area when you click **OK.**

Searching for Resources

There are five ways to find resources to fulfill resource requests on the Staffing Workbench:

- Retrieve resources for the selected rows based on search options and each resource's factor family fit scores for the request.

  This method uses Resource Matching to find resources with the qualifications, availability, and preferences to match the selected resource requests.
- Retrieve resources who entered a bid or received a recommendation for a resource request that appears in the work space.
- Add a resource to a resource request row.
- If you use PeopleSoft Services Procurement, initiate a search for a qualified third-party service provider.

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

Field or Control	Description
	Click the **Search for Resources for selected Requests** icon to retrieve resources for the selected rows based on search options and each resource's factor fit scores for this request. Specify search options at search time. Resource Matching calculates factor fit scores for each combination of resource and resource request. The system returns resources who meet this criteria for a resource request to the grid with the resource request row expanded and a visual indicator that the resource is a result of a Resource Matching search. A message appears for each selected row stating the number of resources that the system found in the search results for the request.

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Field or Control	Description
	Indicates that the corresponding resource was returned in the search results from Resource Matching.
	Click **Retrieve Bids and Recommendations for selected Requests** to retrieve resources who entered a bid or received a recommendation for the selected resource requests. The system returns resources who meet this criteria to the grid with the resource request row expanded and a visual indicator that the resource entered a bid or received a recommendation for the corresponding resource request.
	The resource entered a bid or received a recommendation for the corresponding resource request. Move the mouse pointer across the visual indicator to view the alternate text, which indicates if the resource submitted a bid or was recommended for the resource request.
	Click **Clear Unwanted Resources for selected Requests** to clear unassigned resources, or resources who are not in a *Considering* status, from selected resource request rows. Users should erase the unwanted requests or resources for whom no action is selected if there is any change to the search options. (Manage Utilization, Fulfill Orders, Express Search, Job Spy)

These buttons and icons appear for each resource request row in the work space:

Field or Control	Description
Add Resource	Click to add a resource to the list of candidates. Use this option to directly associate a resource to the resource request. Select the resource and return to the workbench to select the appropriate action.

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Field or Control	Description
	Click **Find External Resource** to access the Create Requisition page in PeopleSoft Services Procurement and create a service requisition to fulfill a resource request with a contractor. Depending on options that are specified on the Installation Options - Resource Management page, either the Create Requisition - Define Requisition page appears for you to select the business unit and requester, or the Create Requisition - Add Items and Services page appears for you to complete the service requisition. **Note:** If you request multiple resources on a resource request, and you click the **Find External Resource** icon to create a service requisition, the system creates one service requisition with multiple requisition lines. If at least one of the requisition lines is filled, you must use the Services Procurement menu navigation to access the requisition. The **Find External Resource** icon is visible only if you use PeopleSoft Services Procurement to outsource assignments to qualified suppliers that satisfy the requirements. These fields on the PeopleSoft Resource Management resource request populate the PeopleSoft Services Procurement service requisition: • A concatenation of the service order and resource request ID populate the **Reference** field (DESCR) on the service requisition. • Resource request project role populates the **Service** field (PROJ_ROLE) on the service requisition. • Resource request description populates the **Job Title** field (JOB_TITLE) on the service requisition. • Resource request location populates the Location (LOCATION) field on the service requisition. • Resource request project business unit and project populate the **PC Bus Unit** (BUSINESS_UNIT_PC) and **Project** (PROJECT_ID) fields, respectively, on the **Chartfields3** tab in the **Accounting Distribution Information** group box on the service requisition. • The first start date and last end date on the resource request populate the **Start Date** field (START_DATE) and **End Date** field (END_DATE) on the service requisition. • Days of work on the resource request populate the **Estimated Service Days** field (DURATION) on the service requisition.

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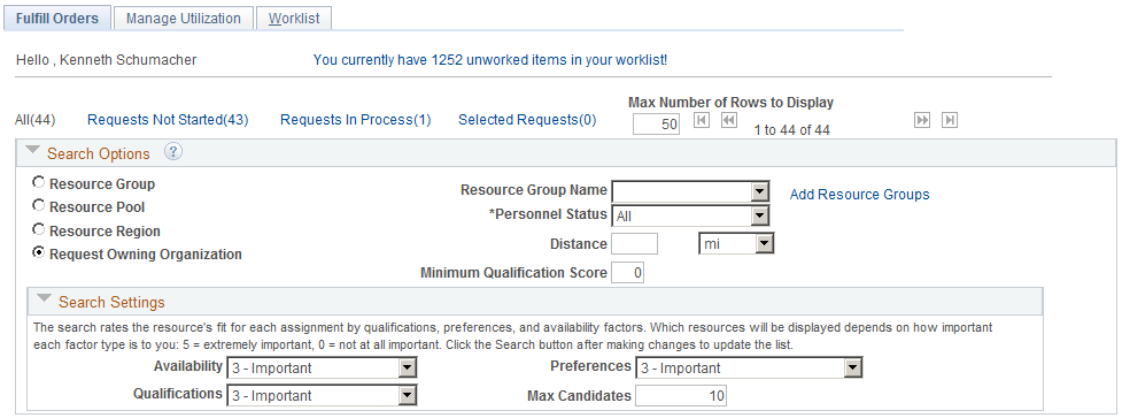
Field or Control	Description
	Note: On the service requisition, enter a service type with a service method of *Resource.* **Note:** The resource request must contain a project and project role if you want to create a PeopleSoft Services Procurement requisition from the Staffing Workbench. See PeopleSoft Services Procurement: Understanding Requisitions.

The following sections provide more details on how to fulfill resource requests on the Staffing Workbench:

Retrieve Resources Based on Factor Fit Scores

Expand the **Search Options** and **Search Settings** collapsible group boxes on the Staffing Workbench - Fulfill Orders page.

This example illustrates the fields and controls on the Search Options and Search Settings collapsible group boxes on the Staffing Workbench - Fulfill Orders page.



> **Note**
>
> Search options and search settings apply only when you click **Search for Resources for selected Requests** to perform a search by using Resource Matching.

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

1. In the **Search Options** collapsible group box, specify the search options to direct your search to a **Resource Group, Resource Pool, Resource Region,**or the **Request Owning Organization** that is specified on the service order.

   You can also specify **Personnel Status**, **Distance** and **Minimum Qualification Score**.

   The **Minimum Qualification Score** option filters out all those Resources in the search results that do not meet the minimum qualification score specified. Only those Resources

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having a qualification score greater than, or equal to the specified minimum qualification score will be displayed in the search results.

If you select **Resource Group,** enter the **Resource Group ID.**

2. If you allow non-employees to be resources, select to include all personnel statuses, or just employees or non-employees, in your search.
3. In the **Search Settings** collapsible group box, assign the relative priorities to the **Availability, Preferences,** and **Qualifications** factor family fit scores for this search session, and identify the **Max Candidates** (maximum candidates) for the system to return.
4. Select the resource request rows for which you want to search for resources.
5. Click **Search for Resources for selected Requests.**

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

The priorities that you specify during the search session are included in each resource's overall fit score calculations. The resources appear in descending order of their overall fit score, which measures how well a resource fits the specified qualifications, availability, and preferences; accounting for the organization's priorities; and the priorities that you specify during the search session. If you change the priorities and search again, Resource Matching recalculates overall fit scores, which potentially changes the order of resources.

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

See Overall Fit Score.

Retrieve Resources Based on Resource Bids and Manager Recommendations

To populate the workbench with resources who entered a bid or received a recommendation for a resource request:

1. Select the resource request rows for which you want to search for resources.
2. Click the **Retrieve Bids and Recommendations for Selected Requests** icon.

If selected resource requests have resources who submitted a bid or received a recommendation, the resources appear in the **Requests** scroll area with the row expanded and a visual indicator that the corresponding resource submitted a bid or received a recommendation.

You can submit a recommendation for a resource directly on the resource request or from the Staffing Workbench - Manage Utilization page. A resource can submit a bid for a resource request from the Job Spy page.

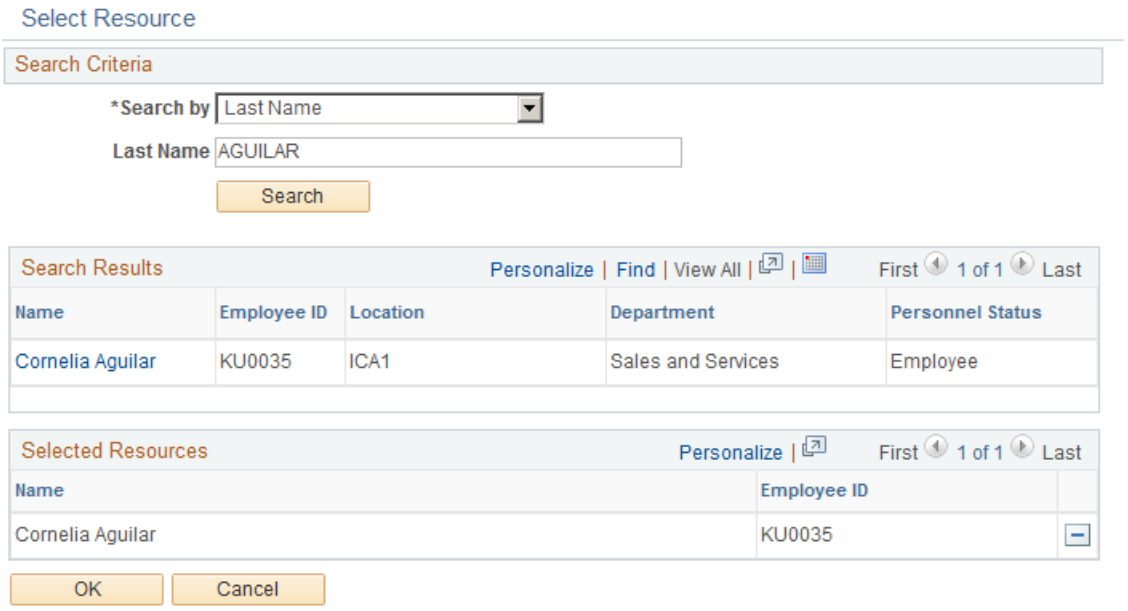
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> **Note**
>
> Search settings that you specify on the Staffing Workbench - Fulfill Orders page do not impact the scores of the resources that are retrieved through Resource Bids and Manager Recommendations.

Add Resources to the Work Space

Click **Add Resource** on a corresponding resource request row to access the Select Resource - Resource Search page.

This example illustrates the fields and controls on the Select Resource - Resource Search page.



To directly add resources to the **Resources** grid for a resource request:

1. Search for a resource by employee ID or name.
2. Select one or more resources from the search results to move to the **Selected Resources** grid.

   Continue searching and selecting resources as needed. Delete rows from the **Selected Resources** grid as needed.
3. Click **OK.**

The selected resources appear in the **Requests** scroll area beneath the resource request summary row.

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> **Note**
>
> Search settings that you specify on the Staffing Workbench - Fulfill Orders page do not impact the scores of the resources that are added to the **Requests** scroll area through **Add Resource.**

Find Third-Party Service Providers Using Services Procurement

To initiate a search for a qualified third-party service provider in PeopleSoft Services Procurement:

1. Click **Find External Resource** on the resource request row.
2. Enter the business unit that is associated with this service requisition, if required based on options that are specified during implementation on the Installation Options - Resource Management page.
3. Enter the requester from the list of valid requesters, if required based on options specify during implementation.

   The list contains only the requesters for which you are authorized to submit requests. The service requisition appears with key requisition data populated from the resource request. The system creates multiple rows on the service requisition if the unfulfilled quantity on the resource request is greater than one.
4. Verify or edit the data in each service requisition field.
5. Save and submit the service requisition to close the page and return to the Staffing Workbench.

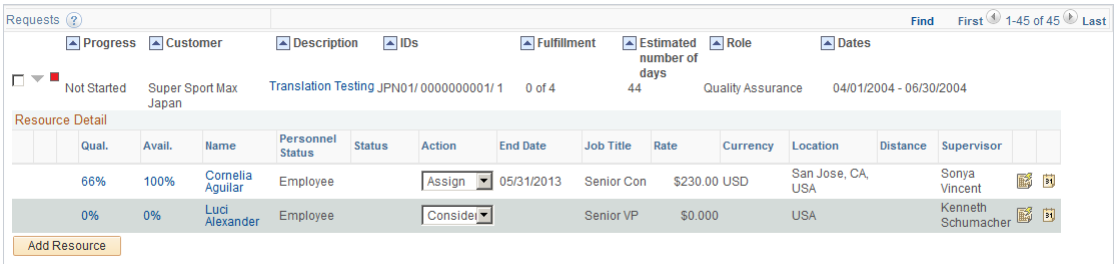
The next time you refresh the Staffing Workbench, the service requisition ID, requested quantity, and number of requests that you filled or canceled appear on the associated resource request row.

See PeopleSoft Services Procurement: Understanding Requisitions.

Evaluating Candidates

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

This example illustrates the fields and controls on the Expanded Requests scroll area on the Staffing Workbench - Fulfill Orders page. You can find definitions for the fields and controls later on this page.



If selected resource requests are matched with resources based on the specified search options and the resource's factor fit scores, the resources appear in the **Requests** scroll area

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with the row expanded. You can click **Selected Requests** to hide all other resource request rows from view.

Expanded rows display basic information about resources, the resource's factor fit scores for the request, the assignment status (if applicable), and a link to the resource profile and job scorecard.

Field or Control	Description
Qual. (qualification) and **Avail.** (availability)	Displays the qualification and availability fit scores, which indicate how closely the resource's profile and schedule match the resource request. The qualification fit score is composed of the qualification and preferences factor family fit scores. Click either fit score link to access the Job Scorecard for <Resource> page and view details about requirements that are included in the resource's fit score calculation for each factor family. **Note:** The qualifications, preferences, and availability scores represent the actual scores of the resource for the request. The scores that appear on the workbench may vary from the Job Scorecard. The scores that appear on the workbench are based on the specified search settings and may vary depending on the relative weights that you define for the settings. See Job Scorecard for <Resource> Page.
Name	Click the resource name link to open the resource profile in a new page. To return to the Staffing Workbench, either close the resource profile page or click in the Staffing Workbench page. See Profiles - Resource Profile Page.
Personnel Status	Displays the resource's personnel status from the Personal Data table (PERSONAL_DATA). This column appears only if you allow non-employees to be established as resources.
Status	Displays the assignment status and provides a link to the assignment if the resource is assigned to the resource request. Click the status link to access the Assign Resource page to view or update the assignment. To return to the Staffing Workbench, either close the assignment page or click in the Staffing Workbench page. **Note:** The search settings that you specify on the workbench do not impact the job scores of the resources that appear in the **Requests** scroll area with a value in the **Status** column. This field is blank if a resource is associated with the request through a bid or recommendation, or was placed on the workbench as a result of Resource Matching, or a direct search.

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Field or Control	Description
Action	Select the appropriate action to take on this resource. Available values are based on the resource's current assignment status for this resource request and your user role security. Values are: *Assign:* Select to assign the resource for this resource request. The assignment appears on the confirmation pages for you to edit and verify. Based on assignment approval workflow options that you specify at implementation, the assignment is automatically routed to the resource manager and project manager for approval after you save and confirm the actions on the workbench. The next time you refresh the Staffing Workbench and this resource request appears in the **Requests** scroll area, the resource's assignment status will be *Pending Approval.* The assignment remains in a pending status until it is approved or canceled. If assignment approval workflow is not enabled, or if the user that creates the assignment is the required approver, the assignment can be saved in a status of *Assigned* without triggering assignment approval workflow. **Note:** Assignments that you create from the Staffing Workbench are based on the resource schedule, not the project schedule. *Cancel:* Select to cancel an existing assignment. *Consider:* Select to associate the candidate with the resource request as someone whom you are considering as a possible match. This is not an assignment status. *Interview, Propose,* or *Reserve:* Select to create an assignment for the selected resource as soon as you save the actions on the workbench. The assignment appears on the confirmation pages for you to edit and verify. *Complete:* Complete an assignment that is in an *Assigned* status. See Assignment Statuses.
Job Title	Displays the resource's job title from the Job table (JOB).
Rate	Displays the resource's bill rate and currency as specified for the resource's employee ID on the Rates by Employee table (PC_RATE_EMPL). If no bill rate is specified for the employee ID, the value is the rate that is associated with the job code in the Job Code Rates table (PC_RATE_JOBC). If neither value exists, the bill rate value is *0.00.*
Location	Displays the location of the resource from the Personal Data record.
Supervisor	Displays the name of the resource's supervisor from the Job record.

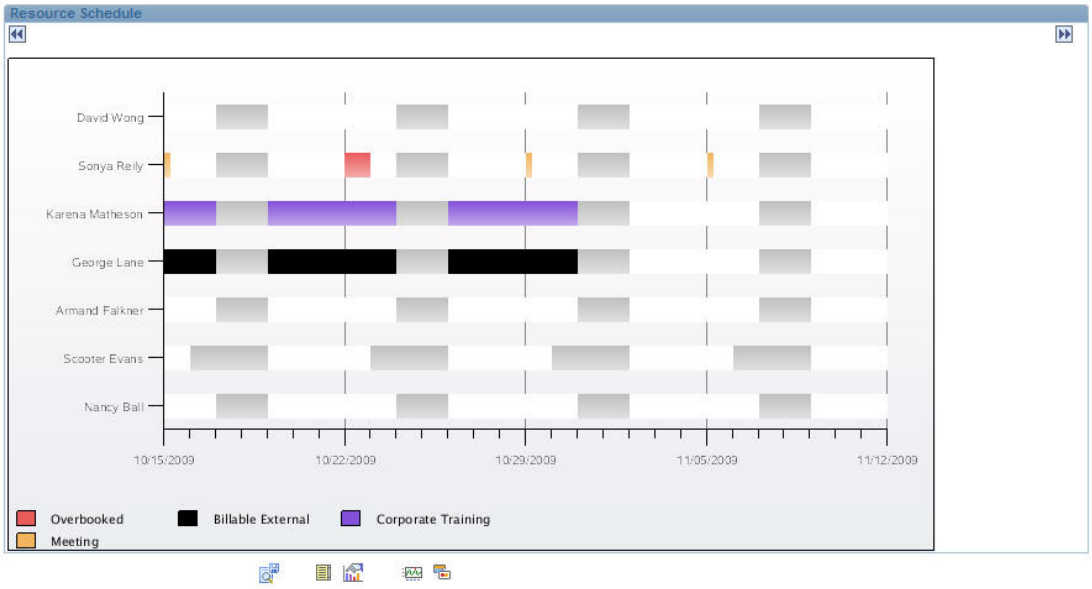
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Field or Control	Description
	Click the **View resource assignment list** icon to access the Assignments for <Resource> page in a new page and view the resource's current assignments, bids, recommendations, and assignment history. This information is useful for evaluating the true availability of candidates, as there may be assignment activity that does not appear on their schedule or that impacts their availability score. Close the browser to return to the workbench, or leave the Assignments for <Resource> page open and click the workbench page. See Assignments for <Resource> Page.
	Click the **View monthly calendar** icon to access the resource's monthly schedule in a new page and view the assignments and appointments schedule. Close the browser to return to the workbench, or leave the schedule open and click the workbench page. See Working with Resource Schedules.

Reviewing the Request Schedule Gantt Chart

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

This example illustrates the fields and controls on the Request Schedule Gantt Chart view.



Both the **Requests** scroll area and the Gantt chart view contain open resource requests that appear in the active filter—all requests, requests not started, requests in process, or just selected requests. If you select a filter while viewing the **Requests** scroll area and then switch to the chart view, the same filter is used to display resource requests in the chart. If you are in

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the chart view and you select a new filter, then revert back to the **Requests** scroll area, the newly selected filter applies.

The request schedule Gantt chart displays:

- Resource request schedules for the next quarter beginning with the current date, with navigation icons to move to the previous or next quarter.
- The customer name, service order description, business unit, and resource request ID.
- Chart bars that represent the request days of work, start and end dates, and the lag time between the request period days and days of work.
- Gray bars that represent any period of time that falls outside of the overall date range.
- Blue bars that represent the resource request days of work.
- Red bars that represent the lag time between the overall date range and the days of work.

Move your mouse across a blue or red bar to view alternate text about the resource request days of work and the number of resources who are needed.

Click a resource request chart bar to return to the **Requests** scroll area with the **Selected Requests** filter active and the resource request row selected and expanded.

Performing Actions

To perform an action on the Staffing Workbench - Fulfill Orders page:

1. In the **Requests** scroll area of the grid view, select the **Select this row** check box for the resource request summary rows on which you want to perform an action.
2. Select an action for the resource-and-resource-request combinations for each selected resource request summary row.

   You can perform an action on any or all resource-and-resource request combinations that appear in the **Requests** scroll area.

   > **Note**
   >
   > You cannot assign a greater number of resources to a resource request than is needed. For example, if a resource request for a quantity of one resource is linked to an assignment in a status of *Pending Approval,* you cannot assign an additional resource to the resource request unless the pending assignment is canceled.

3. Click **Save Actions for all selected items** to perform the actions on the selected summary rows.

> **Note**
>
> When you save actions on one workbench page, the unsaved actions are performed on all workbench pages. For example, if you have access to the Fulfill Resources page and the Manage Utilization page on the Staffing Workbench, any actions that you select for a resource request-and-resource combination on either page are performed when you save either page. The actions from both pages are listed on the Staffing Changes Confirmation and Update Confirmation pages.

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When you save the actions and accept the confirmation pages:

- If there is no existing assignment for this combination of resource and resource request, and if you selected an action status of *Assign,* the system:
  - Creates a new assignment with the indicated status if assignment approval workflow is not enabled, or if the user that is logged into the system is the required approver.
  - Automatically routes the assignment to the required approver if assignment approval workflow is enabled.
- If there is no existing assignment for this combination of resource and resource request, and if you selected an action status of *Interview, Propose,* or *Reserve,* the system creates a new assignment with the indicated status.
- If you selected an action status of *Consider,* the system saves the record to associate this resource with the resource request as a possible candidate.

  An assignment is not created for an action status of *Consider.*

> **Note**
>
> Resources who are in a status of *Consider* are associated with the resource request only on the Staffing Workbench. This information does not appear anywhere else in the system. These resources appear in the **Requests** scroll area each time the resource request appears until their status changes or the resource request is closed or canceled.

- If the resource is already assigned to this resource request, the system updates the assignment with the new assignment status.

Confirming Actions

When you save the actions on the Staffing Workbench, the Staffing Changes Confirmation page appears and explains the changes to be made for every selected resource request. When you accept the changes, the Update Confirmation page appears and confirms that the changes were successful.

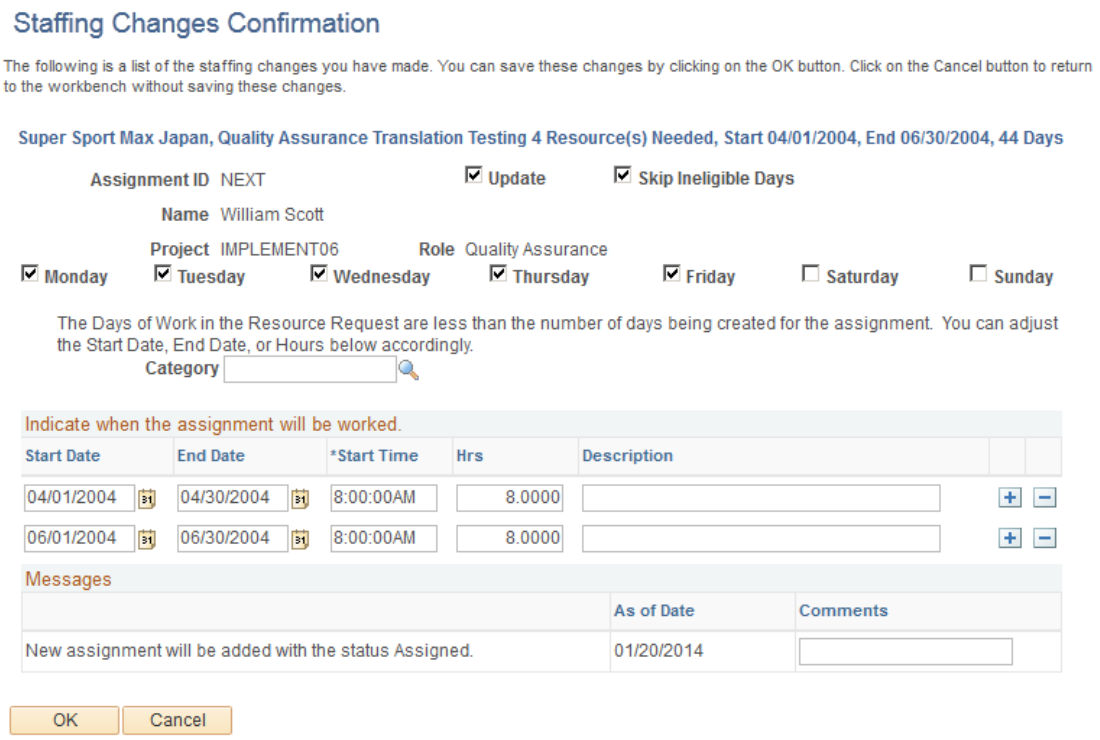
Use these pages to confirm that:

- An assignment is created for an action of *Assign, Interview, Propose,* or *Reserve* for a resource who is not already assigned to this resource request.
- If assignment approval is required, the status of the assignment changes to *Pending Approval.*
- The status of an existing assignment for a resource is changed according to the specified action.
- Any workflow that is associated with the status change is invoked when you confirm the staffing changes.
- Assignment history is updated when you confirm the staffing changes.

Staffing Changes Confirmation

This example illustrates the fields and controls on the Staffing Changes Confirmation page. You can find definitions for the fields and controls later on this page.

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> **Note**
>
> The information that appears on the Staffing Changes Confirmation page and Update Confirmation page differs based on the source of the action. If you initiate an action from the Staffing Workbench - Fulfill Orders page, the resource request description appears at the top of the update section on the confirmation pages. If you initiate an action from the Staffing Workbench - Manage Utilization page, the resource description appears at the top of the update section on the confirmation pages.

The system displays a summary of the changes for each resource request row that is selected at save time. If there are no changes for a selected row, the message **No actions indicated for this Resource Request** appears.

You can modify the assignment values that appear on the Staffing Changes Confirmation page.

Field or Control	Description
Update	Select to confirm the change and update the assignment, resource request, resource schedule, and other workflow. Deselect this check box to cancel the updates. The check box is selected by default.

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Field or Control	Description
Skip Ineligible Days	If you select this value, then you can create an assignment for a resource with ineligible days within the date range. An error message will be displayed if you try to create an assignment with ineligible dates in the specified date range and do not select this value. This field is only available for edit at the time of assignment creation.
Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and **Sunday**	View the default or existing work days for the assignment, and modify them as needed by selecting or deselecting the appropriate check boxes. A message appears if the number of assignment days is more or less than the number of requested days. You can adjust the date range and hours on the Staffing Confirmation page to synchronize the schedule on the assignment and the resource request. If you use PeopleSoft Resource Management without PeopleSoft Program Management, and you select the *Do not schedule assignments on Holidays* option on the Installation Options - Resource Management page, the system does not schedule assignments on days that have tasks with a Scheduled Holiday task category.
Category	Enter the task category that appears as the category on the resource assignment. The default value is based on the value in the **Category** field on the resource request. You can modify the default task category value on the Staffing Changes Confirmation page. If the service order originated on the Manage Generic Resources page in PeopleSoft Program Management, and you modify the default task category value on the Staffing Changes Confirmation page, the new value appears in the **Category** field on the Resource Details page in PeopleSoft Program Management. In this situation, the new value also appears in the **Category** field on the resource request.
Start Date and **End Date**	View the default or existing dates for the assignment, and modify them as needed. To accommodate a noncontiguous schedule, add a row for each nonconsecutive start and end date range for a single assignment.
Start Time and **Hrs** (hours)	View the default or existing start time and hours for the assignment, and modify them as needed.
Description	Enter a description of the date range.
OK	Click to save the specified actions and access the Update Confirmation page.

Update Confirmation

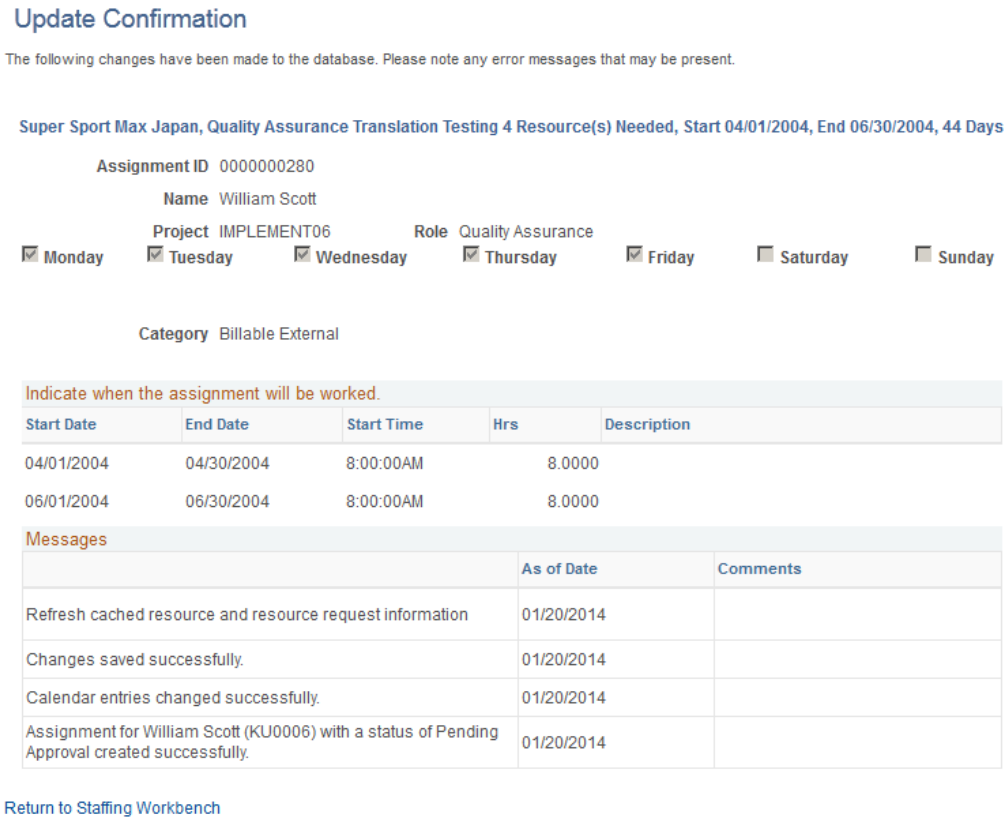
Use the Update Confirmation page (RS_SCWB_CONF_MSG) to confirm actions.

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Navigation:

Click **OK** on the Staffing Changes Confirmation page.

This example illustrates the fields and controls on the Update Confirmation page.



Update Confirmation

The following changes have been made to the database. Please note any error messages that may be present.

Super Sport Max Japan, Quality Assurance Translation Testing 4 Resource(s) Needed, Start 04/01/2004, End 06/30/2004, 44 Days

Assignment ID 0000000280

Name William Scott

Project IMPLEMENT06 Role Quality Assurance

☑ Monday ☑ Tuesday ☑ Wednesday ☑ Thursday ☑ Friday ☐ Saturday ☐ Sunday

Category Billable External

Indicate when the assignment will be worked.

Start Date	End Date	Start Time	Hrs	Description
04/01/2004	04/30/2004	8:00:00AM	8.0000	
06/01/2004	06/30/2004	8:00:00AM	8.0000	

Messages

	As of Date	Comments
Refresh cached resource and resource request information	01/20/2014	
Changes saved successfully.	01/20/2014	
Calendar entries changed successfully.	01/20/2014	
Assignment for William Scott (KU0006) with a status of Pending Approval created successfully.	01/20/2014	

Return to Staffing Workbench

Verify the changes and confirm that they occurred as expected. Click **Return to Staffing Workbench** to return to the **Requests** scroll area and view your changes.

New assignments for the resources in the **Requests** scroll area now appear with an active link in the **Status** column under the associated resource request summary row. Assignments that are created in the Staffing Workbench are populated with values from the resource request, and the system places the resource on the assignment with the designated action status. You can click the status link to access the Assign Resource page and view or modify the assignment.

> **Note**
>
> If you select the action *Assign* and assignment approval is required, the next time that you view the resource's assignments or refresh the Staffing Workbench, the resource's assignment status will be *Pending Approval.* The assignment remains in a pending status until it is approved by the required approver or canceled.

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Fulfilling Generic Resource Requests

Understanding Generic Resource Requests

When project managers plan their projects, often they don't know the extent of the resource requirements, such as the number of resources they need. A generic resource is a labor resource who does not have an employee ID. These generic resources hold resource pool capacity and serve as role-oriented placeholders for resources during the project-planning phase.

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

You create a generic resource request in PeopleSoft Program Management by selecting a resource status of *Requested* on the Resources page or Resource Detail page. This action sends the generic resource request to the Pool Manager Workbench in PeopleSoft Resource Management with a status of *Pending Approval* if the **Pool Manager Approval required** check box for the **Generic Resource Approval required** option is selected on the Resource Management Options page for the business unit. If that option is not selected, or if the user who is requesting the resource is the required approver, the generic resource request is sent to the Pool Manager Workbench with a status of *Allocated.* The system populates the qualifications, keywords, and notes on the generic resource request with the qualifications, keywords, and notes from the Update Generic Resource Qualifications page for the generic resource.

You can either fulfill the generic resource request with a named resource, or you can simply allocate capacity.

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

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

Managing Generic Resource Requests

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

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

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

This topic discusses how to manage generic resource request.

Pages Used to Manage Generic Resource Requests

Page Name	Definition Name	Usage
Generic Resource Request Page	RS_GRR_APPRVL	Fulfill a generic resource request.
Pool Manager Workbench - Fulfill Request Page	RS_GRR_WKBNCH	Find resources to fulfill generic resource requests.
Select Resource - Resource Search Page	RS_RESRC_SRCHM_SEC	Directly associate resources with resource requests on the Pool Manager Workbench - Fulfill Requests page. You can also directly associate a named resource with the resource request on the Generic Resource Request page by clicking the **Lookup Employee** icon in the **Assignment Information** group box. Identifying and Adding Resources to Fulfill Generic Resource Requests
Staffing Changes Confirmation Page	RS_GRR_WB_CONF_MSG	View assignment actions before committing changes. Add comments for assignment activity.
Update Confirmation Page	RS_GRRWB_CONF_MSG	Confirm assignment actions. Staffing Changes Confirmation Page

Related Topics

- PeopleSoft Program Management: Understanding Resource Tools

Generic Resource Request Page

Use the Generic Resource Request page (RS_GRR_APPRVL) to fulfill a generic resource request.

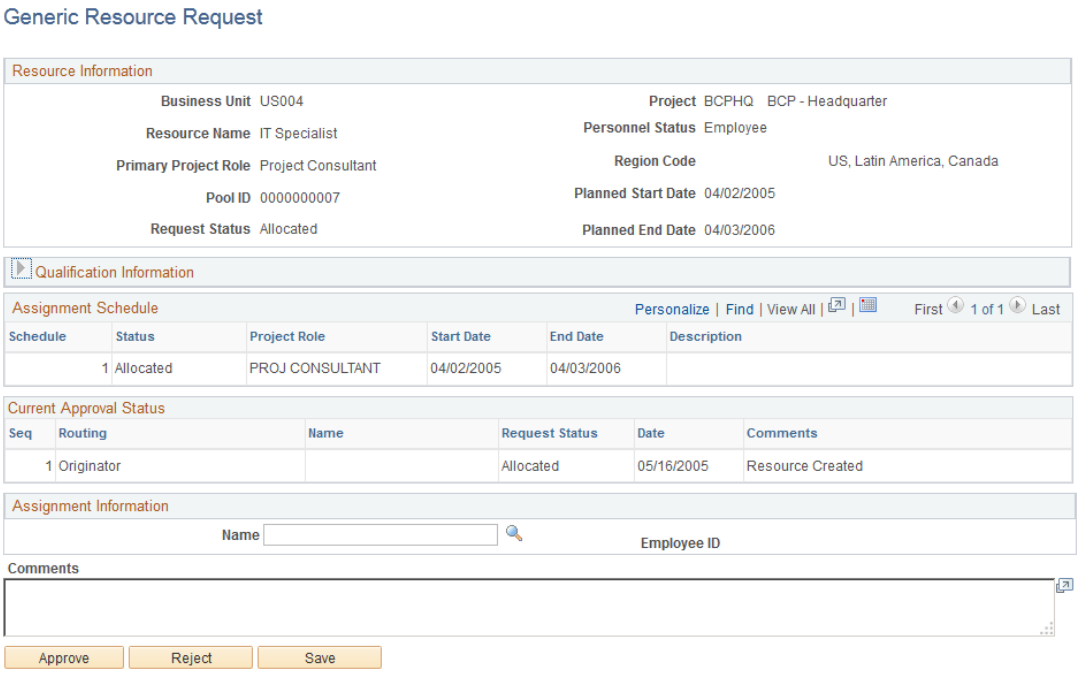
Navigation:

- Click a link in the **IDs** column on the Pool Manager Workbench - Fulfill Request page.

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- Click a **Details** link in the **Link** column on the Pool Manager Workbench - Worklist page for a worklist item with an action of *Generic Resource For Approval.*

This example illustrates the fields and controls on the Generic Resource Request page. You can find definitions for the fields and controls later on this page.



Qualification Information

Expand the **Qualification Information** group box on the Generic Resource Request page to specify the desired competencies, flexible qualification factors, keywords, and notes for the requested resource. You can specify qualifications based on a predefined qualification profile, or look up specific qualifications from a list, or select competencies from the Competency tree. Resource Matching uses qualifications to find qualified resources.

When you create a generic service order from the Resources page or Resource Detail page in PeopleSoft Program Management, the system populates the qualifications, keywords, and notes on the generic resource request from the Update Generic Resource Qualifications page for the generic resource. You can change the qualifications, keywords, and notes on the generic resource request; however, these changes are not reflected in PeopleSoft Program Management.

Assignment Schedule

Field or Control	Description
Schedule	Displays the schedule sequence.

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Field or Control	Description
Status	Displays one of these generic resource request statuses: *Pending Approval:* Indicates that pool manager approval workflow is activated for generic resource requests, and the pool manager has not yet approved the resource request. *Allocated:* Indicates that the generic resource request is approved, and that a named resource is not assigned.
Project Role	Displays the project role that is associated with the resource request.
Start Date and **End Date**	Displays the start and end dates for the resource request.

Current Approval Status

Field or Control	Description
Routing	Displays the approval type: *Originator* or *Approver*.
Name	Displays the name of the originator or approver.
Request Status	Indicates completed steps in the generic resource request approval process.
Date	Displays the date on which the approval status was assigned.

Assignment Information

Field or Control	Description
Name	Select a named resource from the requesting resource pool. This field is not editable once you create the assignment. After you select a named resource, click the **Approve** button to change the **Request Status** in the **Current Approval Status** grid to *Fulfilled*. This action creates the assignment and fulfills the generic resource request. **Note:** You can approve a generic resource request without providing a named resource for it.
Comments	Enter information regarding the generic resource request, such as why you rejected the request. The comments appear on this page when the project manager reviews the request. Pool managers must enter comments when they reject a request.

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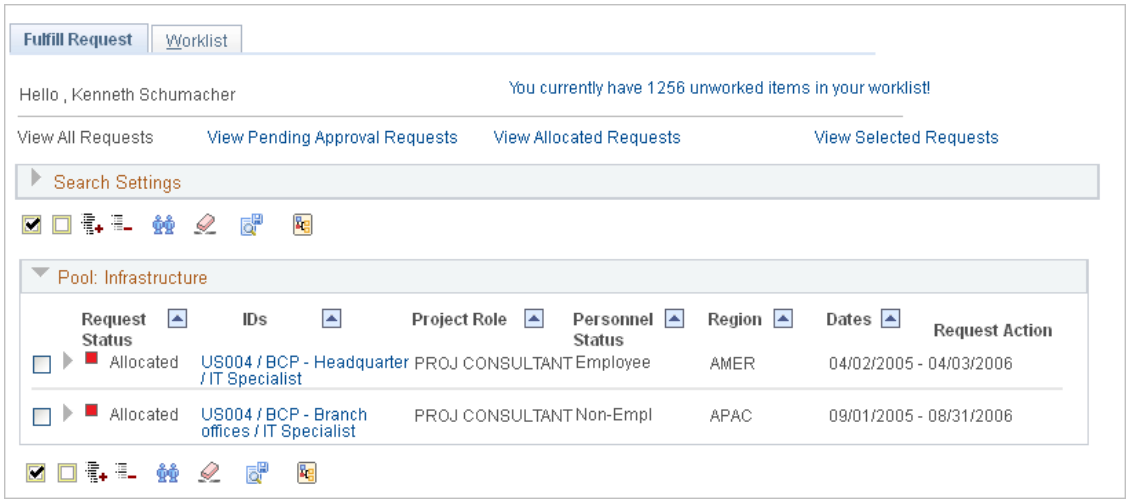
Pool Manager Workbench - Fulfill Request Page

Use the Pool Manager Workbench - Fulfill Request page (RS_GRR_WKBNCH) to find resources to fulfill generic resource requests.

Navigation:

Resource Management, and then **Pool Manager Workbench**, and then **Fulfill Request**

This example illustrates the fields and controls on the Pool Manager Workbench - Fulfill Request page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Hello , <User Name>	Displays the name that is associated with the user ID.
You currently have <number> unworked items in your worklist!	Click to access the Worklist page and view or process items that are routed from PeopleSoft workflow. **Note:** The number of unworked items on the Worklist page does not necessarily correspond to the number of unfulfilled generic resource requests on the Pool Manager Workbench - Fulfill Requests page. See Understanding the Worklist.

Pool: <Pool Name>

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

Each resource request row has a visual indicator that depicts how close the current date is to the requested start date for the request. This helps you determine which requests need your attention first. The visual indicators behave the same as the ones on the Staffing Workbench - Fulfill Orders page.

See Staffing Workbench - Fulfill Orders Page.

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Resource Request Summary Rows

Rows in the **Pool: <Pool Name>** group box are collapsed when you enter the page. These rows provide resource request summary information.

Field or Control	Description
Request Status	Displays generic resource request fulfillment progress. *Pending Approval:* The request has not been approved yet. *Allocated:* The request is approved and is waiting to be fulfilled with a named resource.
IDs	Displays a concatenation of the business unit ID, project name, and resource name. Click a link in this column to access the Generic Resource Request page.
Project Role	Displays the primary project role ID that is specified on the generic resource request.
Personnel Status	Displays the personnel status that is requested on the generic resource request. If the value is blank, employee and non-employee resources may appear in the search results if you allow non-employees to be established as PeopleSoft Resource Management resources.
Region	Displays the region that is requested on the generic resource request. If the value is blank, resources from any region may appear in the search results.
Dates	Displays the start and end dates of the request. If multiple date ranges are indicated on the request, this column displays the earliest start and latest end dates of those indicated date ranges.
Request Action	Select the generic resource request action to take on the selected pending approval request. Available options are: *Approve:* Select to approve the generic resource request. This action allocates the requested resource capacity of a resource in the corresponding pool. *Reject:* Select to reject the generic request. This action does not allocate any resource capacity in the corresponding pool for the request. No data appears in the **Request Action** column if the generic resource request is already allocated.

Resource Rows

Expand the generic resource request summary rows to view basic information about resources who are associated with the generic resource request and the resource's factor fit scores for the request.

A resource may appear in the expanded row if:

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- You are considering the resource for the resource request.
- You add this resource to the resource request row.
- Resource Matching returns the resource in a search.

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

See Evaluating Candidates.

Filtering and Expanding the Generic Resource Request List

You can view subsets of the unfulfilled generic resource requests that are assigned to you. Four filters control the generic resource requests that appear in the **Pool: <Pool Name>** scroll area. Only requests that meet the particular filter criteria appear in the scroll area.

Field or Control	Description
View All Requests	Click this link to view all open generic resource requests that have a value of *Pending Approval* or *Allocated,* and are associated with a resource pool that is assigned to you.
View Pending Approval Requests	Click this link to view a subset of generic resource requests that are pending approval.
View Allocated Requests	Click this link to view a subset of generic resource requests that are allocated. Allocated requests are requests for which the pool manager has allocated resource capacity from the pool to the requestor, but for which the pool manager has not yet assigned a specific resource.
View Selected Requests	Click this link after selecting the check box beside the generic resource requests that you want to appear in the **Pool:** <**Pool Name**> scroll area. To remove another resource request from this filter, deselect the request check box and click **View Selected Requests** again.
	Click **Select All** to select all generic resource requests that appear in the **Pool:** <**Pool Name**> scroll area.
	Click **Deselect All** to deselect all generic resource requests.
	Click **Expand All** to expand all generic resource request summary rows.
	Click **Collapse All** to collapse all generic resource request summary rows.

Identifying and Adding Resources to Fulfill Generic Resource Requests

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

- Retrieve resources for the selected rows based on each resource's factor family fit scores for the generic request.

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- Add a resource that belongs to the requested resource pool to a generic resource request row.

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

Field or Control	Description
	Click the **Search** icon to retrieve resources for the selected rows based on search options and each resource's factor fit scores for this request. Specify search options at search time. Resource Matching calculates factor fit scores for each combination of resource and generic resource request. The system returns resources who meet this criteria for a generic resource request to the **Pool:** <**Pool Name**> group box with the resource request row expanded and a visual indicator that the resource is a result of a Resource Matching search. A message appears for each selected row stating the number of resources that the system found in the search results for the request.
Add Resource	Click this button to add a resource to the list of candidates. This button appears for each expanded resource request row. Use this option to directly associate a resource to the generic resource request. Select the resource and return to the workbench to select the appropriate action. The resource selected must belong to the requesting resource pool.

Search for Resources Based on Factor Fit Scores

Expand the Search Settings collapsible group box.

> **Note**
>
> The search is limited to the resource pool that is specified on the generic resource request.

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

1. Assign the relative priorities to the **Availability, Preferences,** and **Qualifications** factor family fit scores for this search session, and identify the **Max Candidates** (maximum candidates) for the system to return.
2. Select the generic resource request rows for which you want to search for resources.
3. Click the **Search** icon.

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

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The priorities that you specify during the search session are included in each resource's overall fit score calculations. The resources appear in descending order of their overall fit score, which measures how well a resource fits the specified qualifications, availability, and preferences; accounting for the organization's priorities; and the priorities that you specify during the search session. If you change the priorities and search again, Resource Matching recalculates overall fit scores, which potentially changes the order of resources.

When the system returns scores, click the score to access the Job Scorecard for <Resource> page.

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

See Overall Fit Score.

Add Resources to the Work Space

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

To directly add resources to a generic resource request row in the **Pool: <Pool Name>** group box:

1. Search for a resource by employee ID or name by selecting the appropriate option in the **Search by** drop-down list box.

   Resources appear for selection that are assigned to the pool as of the current date, and that have a future start date in this pool. This enables pool managers to assign a future-dated resources to generic resource requests with corresponding future dates.

   > **Note**
   >
   > If the pool manager selects a future-dated resource for a request, and resource manager assignment approvals are activated, the system sends the assignment approval workflow to the resource's current resource manager.

2. Click the resource **Name** link to add it to the **Selected Resources** grid.
3. Click **OK** to add the resource to the **Pool: <Pool Name>** group box on the Pool Manager Workbench - Fulfill Request page.

   > **Note**
   >
   > Search settings that you specify on this page do not impact the scores of the resources that you add to a generic resource request row by using the **Add Resource** button.

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Evaluating Candidates

Select a generic resource request row and click the **Search** icon for the system to retrieve resources with factor fit scores based on specified search options.

If selected resource requests are matched with resources based on the specified search options and the resource's factor fit scores, the resources appear in the **Pool: <Pool Name>** group box with the row expanded. You can click the **View Selected Requests** link to hide all other resource request rows from view.

Expanded rows display basic information about resources, the resource's factor fit scores for the request, the assignment status (if applicable), and a link to the resource profile and job scorecard.

Field or Control	Description
Qual. (qualification) and **Avail.** (availability)	Displays the Qualification and Availability factor family fit scores, which indicate how closely the resource's profile and schedule match the resource request. The qualification fit score is made up of the Qualification and Preferences factor family fit scores. Click either fit score link to access the Job Scorecard for <Resource> page and view details about requirements that are included in the resource's fit score calculation for each factor family. **Note:** The qualification, preferences, and availability scores represent the actual scores of the resource for the request. The scores that appear on the workbench may vary from the Job Scorecard. The scores that appear on the workbench are based on the specified search settings and may vary depending on the relative weights that you define for the settings. See Job Scorecard for <Resource> Page.
Name	Click the resource name link to open the resource profile in a new page. See Profiles - Resource Profile Page.
Role	Displays the resource's project role from the resource profile.

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Field or Control	Description
Status	Displays the assignment status of *Considering* or *Pending Approval*. For assignments that are pending approval, click the status link to access the Assign Resource page to view or update the assignment. **Note:** If a resource status is *Assigned* or *Pending Approval*, the status appears when you return to the workbench from the Update Confirmation page immediately after you create the assignment. If the pool manager refreshes the workbench, the pending approval or assigned generic resource requests no longer appear in the workbench because the generic resource request is fulfilled, and therefore is no longer in the pool manager's queue. **Note:** The search settings that you specify on the workbench do not impact the scores of the resources that appear in the grid with a value in the **Status** column.

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Field or Control	Description
Action	Select an action to assign this resource to the generic resource request when you save the page: • *Assign:* The assignment appears on the confirmation pages for you to edit and verify. At that time you can modify the days of the week, hours per day, and start time, and make comments. Based on assignment approval workflow options that you specify at implementation, the system automatically routes the assignment to the resource manager or project manager for approval after you save and confirm the actions on the workbench. The resource's assignment status changes to *Pending Approval,* and remains in a pending status until it is approved or canceled. The next time that you refresh the Pool Manager Workbench, this request will not appear in the **Pool:** <**Pool Name**> group box. If assignment approval workflow is not enabled, or if the user that is logged into the system is the resource's manager, the assignment can be saved in a status of *Assigned* without triggering assignment approval workflow. You can assign only one resource to one generic resource request. • *Consider:* Associate the candidate with the resource request as someone whom you are considering as a possible match. This is not an assignment status. **Note:** When project manager approval workflow is enabled for the business unit, you must assign a project manager prior to assigning resources to the project. If a project manager is not assigned to the project and project manager approval workflow is enabled, the resource that is selected on the Pool Manager Workbench will be associated with the project with a resource status of *Considered* and no PeopleSoft Resource Management assignment will be created. The generic resource request no longer appears on the Pool Manager Workbench because the pool manager has provided a resource for the request. You can view the resource's *Considered* status on the Resources page or Resource Detail page in PeopleSoft Program Management. You cannot change this resource's status to *Assigned* until after a project manager is assigned to the project. See Assignment Statuses.
Personnel Status	Displays the resource's personnel status from the Personal Data record (PERSONAL_DATA). This column appears only if you allow non-employees to be established as resources.

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Field or Control	Description
Region	Displays the region of the resource from the resource profile.
Rate	Displays the resource's bill rate and currency as specified for the resource's employee ID. If no bill rate is specified for the employee ID, the value is the rate that is associated with the job code in the Job Code Rates table (PC_RATE_JOBC). If neither value exists, the bill rate value is *0.0000.*
	Click the **Assignment** icon to access the Assignments for <Resource> page in a new page and view the resource's current assignments, bids, recommendations, and assignment history. This information is useful when evaluating the true availability of candidates, as there may be assignment activity that does not appear on their schedule or that impacts their availability score. See Assignments for <Resource> Page.
	Click the **Monthly Calendar** icon to access the resource's monthly schedule in a new page and view the assignments and appointments schedule. See Working with Resource Schedules.

When you save the page and accept the confirmation:

- If there is no existing assignment for this combination of resource and project, and if you selected an **Action** status of *Assign,* the system:
  - Creates a new assignment with the indicated status if assignment approval workflow is not enabled.
  - Automatically routes the assignment to the resource's manager, the project manager, or both, for approval if assignment approval workflow is enabled.
- If you selected an **Action** status of *Consider,* the system saves the record to associate this resource with the generic resource request as a possible candidate.

  An assignment is not created for an action status of *Consider.*

> **Note**
>
> Resources that have a status of *Consider* are associated with the resource request only on the Pool Manager Workbench and the Generic Resource Request page. These resources appear in the **Pool: <Pool Name>** group box each time the generic resource request appears until their status changes or the generic resource request is closed or canceled.

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Viewing the Supply Category Analytic Report

Field or Control	Description
	Click the **Supply Category Analytic Report** icon to view the supply category availability analytic. See Conducting Consolidated Scenario Analysis.

Staffing Changes Confirmation Page

Use the Staffing Changes Confirmation page (RS_GRR_WB_CONF_MSG) to view assignment actions before committing changes.

Add comments for assignment activity.

Navigation:

Save an action for selected rows on the Pool Manager Workbench - Fulfill Request page.

When you save the actions on the Pool Manager Workbench - Fulfill Requests page, the Staffing Changes Confirmation page appears and explains the changes to be made for every selected generic resource request. You can modify the assignment values that appear on the Staffing Changes Confirmation page. When you accept the changes, the Update Confirmation page appears and confirms that the changes were successful.

Use these pages to confirm that:

- An assignment is created for the resource selected.
- If assignment approval is required, the status of the assignment changes to *Pending Approval.*
- Assignment history is updated when you confirm the request changes.

The fields on the Staffing Changes Confirmation page and Update Confirmation page behave the same as the confirmation pages on the Staffing Workbench - Fulfill Orders page.

See Confirming Actions.

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Managing Resource Utilization

Understanding Resource Utilization Using the Staffing Workbench

One of the primary responsibilities of a resource manager is to make sure that the resources are effectively utilized. Managing utilization is difficult, and it requires that you know the assignment status, skills, availability, and interests of resources. PeopleSoft Resource Management enables you to effectively manage resource utilization on the Staffing Workbench. The workbench that staffing coordinators use to manage service order fulfillment can also be used by resource managers to fully utilize resources. This common workbench is convenient for practice managers, who are ultimately responsible for both staffing and resource utilization.

The Staffing Workbench - Manage Utilization page serves as a central work space for a resource manager by providing immediate access to the information and features that are most important to that role. When you first access the page, a list of resources appears, along with information about their current assignment status. You can instantly determine the status of each member of the organization.

On the Staffing Workbench - Manage Utilization page, you can:

- View the current assignment status of resources.
  - View resources in a list or in utilization charts.
  - Dynamically filter the resources by assignment status.
  - Select resources to evaluate and filter the view to display only those resources.
  - Select a different resource group to change the list of resources to evaluate.
- Identify potential work assignments for a resource.
  - Perform a search for resource requests using Resource Matching.

    You can specify search options that define the set of resource requests for Resource Matching to evaluate when finding work for resources. If you do not find suitable resource requests, you can change the search options and search again.

    You can specify the search settings, such as the relative importance of factor family fit scores and the maximum number of resource requests to review, for Resource Matching to use when finding resource requests that fit the availability, qualifications, and preferences of the resource.
  - View resource requests for which a resource has submitted a bid or been recommended.
  - Select resource requests to evaluate for a resource.
- Evaluate resource-and-resource-request combinations and make recommendations.
- Access the Assign Resource page to directly assign a resource.

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Workbench Tools used to Evaluate Resource Requests

With functionality and convenience that is similar to the Staffing Workbench - Fulfill Orders page, the Staffing Workbench - Manage Utilization page provides easy access to the tools that you need to find work for resources. From the workbench, you can:

- Evaluate resource availability, qualifications, and preferences.

  The Job Scorecard page contains the request dates and other requirements that are included in the fit score calculation for the resource-and-resource-request combination.
- View current resource assignments in the work space or view a list of all the resource's assignments.

  You can create or open an assignment and modify it as needed, or open the resource's schedule to access all of the resource's assignments and appointments.
- Review the resource's work experience, qualifications, preferences, and other general information in the resource profile.
- Open the service order and resource request to review details.

Specifying Staffing Workbench and Resource Utilization Options

To specify workbench and resource utilization options, use the Staffing Workbench Options component (RS_MYWKBNCH_OPT).

Pages Used to Specify Staffing Workbench and Resource Utilization Options

Page Name	Definition Name	Usage
My Workbench Options - Workbench Page	RS_MYWKBNCH_OPT	Select the default resource group to appear on the Manage Utilization page.
Resource Group Definition - Resource Groups Page	RS_RESOURCE_GROUPS	Add or modify resource groups and select active resource groups. My Workbench Options - Workbench Page
My Workbench Options - Utilization Page	RS_MYWKBNCHRSC_OPT	Select options for the Staffing Workbench - Manage Utilization page such as the grid sort order, number of days before the end date that an assignment is treated as ending, minimum utilization percentage, optimal utilization ratio, and chart appearance. You can also specify whether to include your name on the workbench if you are a member of the selected resource group. The My Workbench Options - Orders options page is discussed in a previous topic.

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My Workbench Options - Workbench Page

Use the My Workbench Options - Workbench page (RS_MYWKBNCH_OPT) to select the default resource group to appear on the Manage Utilization page.

Navigation:

Resource Management, Define User Options, My Workbench Options, Workbench

Field or Control	Description
Resource Group ID	Enter the default group of resources to appear in the **Resources** scroll area upon accessing the Staffing Workbench - Manage Utilization page. The list contains the groups that you designated as active. Your selection is also used as the default resource group search option on the Staffing Workbench - Fulfill Orders page and the Express Search page, and appears on the Resources Needing Assignments operational summary portal pagelet. If you do not select a resource group, the **Resources** work space will not contain any resource rows when you access the Staffing Workbench - Manage Utilization page. You can select a different resource group from the Staffing Workbench and the Express Search page when you search for resources.
Add Resource Groups	Click this link to access the Resource Group Definition - Resource Groups page and modify your list of active groups, modify or delete existing groups, or create new groups. See Establishing Resource Groups.

My Workbench Options - Utilization Page

Use the My Workbench Options - Utilization page (RS_MYWKBNCHRSC_OPT) to select options for the Staffing Workbench - Manage Utilization page such as the grid sort order, number of days before the end date that an assignment is treated as ending, minimum utilization percentage, optimal utilization ratio, and chart appearance.

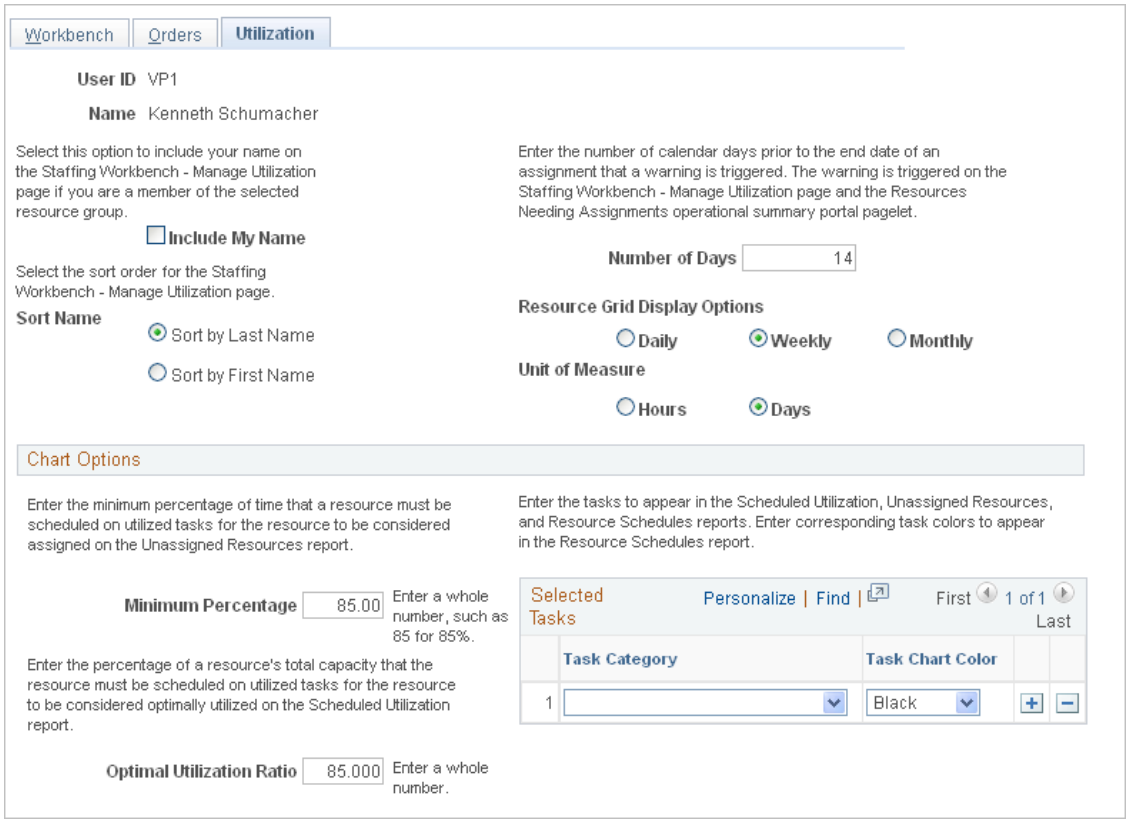
You can also specify whether to include your name on the workbench if you are a member of the selected resource group.

Navigation:

Resource Management, and then **Define User Options**, and then **My Workbench Options**, and then **Utilization**

This example illustrates the fields and controls on the My Workbench Options - Utilization page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Include My Name	Select to include your name in the **Resources** scroll area on the Staffing Workbench - Manage Utilization page if you are a member of the selected resource group.
Sort Name	Select the sort order for resources who appear on the Staffing Workbench - Manage Utilization page.
Number of Days	Enter the number of days before the end date that an assignment is treated as ending. This number is used to trigger a warning on the Staffing Workbench - Manage Utilization page and the Resources Needing Assignments operational summary portal pagelet that a resource has an assignment ending. The default value is *14*.
Resource Grid Display Options	Choose either **Daily, Weekly** or **Monthly.**
Unit of Measure	Choose either **Hours** or **Days.**
Minimum Percentage	Enter the minimum percentage of time that a resource must be scheduled on utilized tasks for the resource to be treated as assigned in the Unassigned Resources interactive report. Enter a whole number or mixed number. For example, enter *75* for 75 percent, or *85.5* for 85.5 percent. The default value is *85.00*.

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Field or Control	Description
Optimal Utilization Ratio	Enter the percentage of a resource's total capacity that the resource must be scheduled on utilized tasks for the resource to be treated as optimally utilized on the Scheduled Utilization interactive report. Enter a whole or mixed number. The default value is *85.000*.
Task Category and **Task Chart Color**	Enter the tasks to appear in the Scheduled Utilization, Unassigned Resources, and Resource Schedule charts. Enter a corresponding task color to appear in the Resource Schedule chart. If you do not enter tasks and corresponding task colors on this page, the Resource Schedule chart uses the default tasks and colors that are specified on the Installation Options - Resource Management page.

> **Note**
>
> The My Workbench Options - Orders options page is discussed in a previous topic.

Related Topics

- My Workbench Options - Orders Page
  Use the My Workbench Options - Orders page (RS_MYWKBNCHREQ_OPT) to select the default search scope option for the Staffing Workbench - Fulfill Orders page.

Managing Resource Utilization

This topic discusses how to manage resource utilization.

Pages Used to Manage Resource Utilization

Page Name	Definition Name	Usage
Staffing Workbench - Manage Utilization Page	RS_MYRESOURCES	View key resource statistics and find assignments for available resources.
Staffing Workbench - Add Request to List Page	RS_SCWB_RRSRCH_SEC	Search for resource requests to directly associate with resources on the Staffing Workbench - Manage Utilization page. Searching for Assignments for Resources

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Page Name	Definition Name	Usage
Staffing Changes Confirmation Page	RS_SCWB_CONF_MSG	View actions and modify default values before committing changes. Add comments for assignment activity. Confirming Actions
Update Confirmation Page	RS_SCWB_CONF_MSG	Confirm the Staffing Workbench actions. Confirming Actions

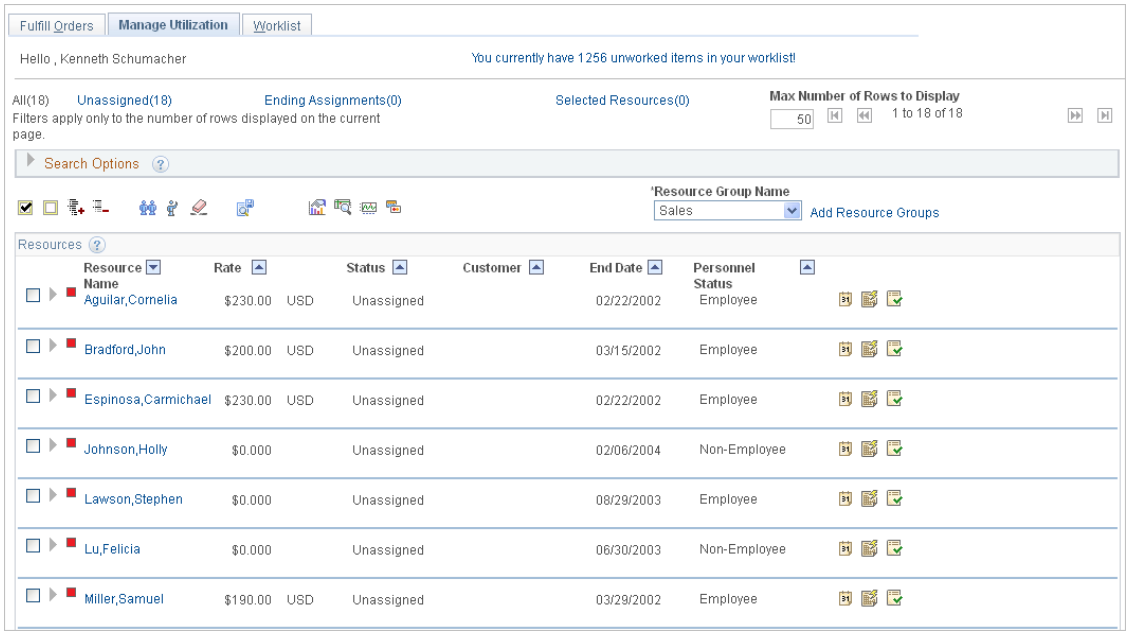
Staffing Workbench - Manage Utilization Page

Use the Staffing Workbench - Manage Utilization page (RS_MYRESOURCES) to view key resource statistics and find assignments for available resources.

Navigation:

Resource Management, Staffing Workbench, Manage Utilization

This example illustrates the fields and controls on the Staffing Workbench - Manage Utilization page. You can find definitions for the fields and controls later on this page.



The Staffing Workbench - Manage Utilization page provides a multi-layer view of PeopleSoft Resource Management data that is especially useful for the resource manager. The first scroll area displays encapsulated resource data with visual indicators denoting the resource's current assignment status. You can access resource assignments, profiles, and schedules, and use Resource Matching to find potential resource requests for a resource. You can also review interactive reports and recommend resources for specific requests.

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Field or Control	Description
Hello , <User Name>	Displays the name that is associated with the user ID.
You currently have <number> unworked items in your worklist!	Click to access the Worklist page and view or process items that are routed from workflow. See Understanding the Worklist.
Max Number of Rows to Display	Select the maximum number of rows you want the system to display at a time. The system defaults this value to *50,* but users can change this to another number. The system displays the number of rows returned. Use the scroll buttons to scroll through the search results.

Resources

Upon entering the workbench, the **Resources** scroll area displays a summary-level, collapsed row for each resource in the resource group that you specify on the My Workbench Options - Utilization page. If you do not select a default resource group, no resource rows appear in the work space. You can select a different resource group at any time to change the resources who appear on this page.

For each resource, you can view:

- Visual indicators.
- Summary information about the resource's current assignment.
- Resource request actions.

Visual Indicators

Each resource row in the work space has a visual indicator that depicts the resource's assignment status. This helps you determine which resources need your attention first.

Field or Control	Description
	A green circle indicates that the corresponding resource is currently assigned.
	A yellow triangle indicates that the corresponding resource may soon be available for a new assignment. This visual indicator appears if the resource's assignment end date falls within the number of days from the current day that you specify on the My Workbench Options - Utilization page.
	A red square indicates that the corresponding resource is unassigned. If the current day is a workday as specified on the resource's profile, the system determines if the resource has a task scheduled that day. If the current day is not a workday, the system determines if the resource has a task scheduled on the next workday. If no task is scheduled, the resource is treated as unassigned and this visual indicator appears.

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Resource Summary Rows

Rows in the **Resources** scroll area are collapsed when you enter the page. These rows provide resource summary information.

Field or Control	Description
 or	Click to expand or collapse individual resource rows. Expanded rows display information about resource requests that are associated with a resource.
	Click to sort the list of resources by the corresponding column heading in ascending or descending order.
Resource Name	Click the resource name link to open the resource profile in a new page. To return to the Staffing Workbench, either close the resource profile page or click in the Staffing Workbench page. See Profiles - Resource Profile Page.
Rate	Displays the resource's bill rate and currency as specified for the resource's employee ID. If no bill rate is specified for the employee ID, the value is the rate that is associated with the job code in the Job Code Rates table (PC_RATE_JOBC). If neither value exists, the bill rate value is *0.0000.*
Status	Displays the resource's current status as: *Unassigned:* The resource is not currently working on an assignment. *Assignment Ending:* The resource is currently on an assignment that is ending within the number of days specified on the My Workbench Options - Utilization page. *<Task category>:* The resource is currently working on an assignment with this task category, and the latest assignment end date is beyond the number of days specified for ending assignments on the My Workbench Options - Utilization page. **Note:** A resource is designated as working on an assignment if the assignment dates overlap the current date—regardless of the assignment status. For example, if a resource is placed on an assignment, and today's date is between the assignment start and end dates, then this field displays either a task category or the value *Assignment Ending,* based on the assignment end date.
Customer	Displays the customer name that appears on the resource's current assignment. The field is blank if the resource is not currently working on an assignment.

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Field or Control	Description
End Date	Displays the end date of the resource's current assignment or, if the resource is not currently assigned, the end date of the resource's most recent assignment. If the assignment includes multiple date ranges, the last end date appears.
Personnel Status	Displays the resource's personnel status. This column contains data only if you allow non-employees to be established as resources.
	Click the **Monthly Calendar** icon to access the resource's monthly schedule in a new page and view the assignments and appointments schedule. Close the browser to return to the workbench, or leave the schedule open and click the workbench page. See Working with Resource Schedules.
	Click the **View List of Assignments** icon to access the Assignments for <Resource> page in a new page and view a list of the resource's current assignments, bids, recommendations, and assignment history. This information is useful when evaluating the true utilization of resources. Future assignment activity may not appear on a resource's schedule, depending on the assignment status.
	Click the **Create Assignment** icon to access the Assign Resource page with the resource's name populated on the page. This icon appears only for users with permission to create assignments. You can create an assignment for the resource and click **Save,** or click **Cancel** to return to the Staffing Workbench without creating an assignment.

Resource Request Rows

When you expand resource summary rows, they display basic information about resource requests that are associated with the resource, the resource's factor fit scores for the request, the request dates, role, and customer, and a link to the request.

A resource request may appear in the expanded row if:

- Resource Matching returns the resource request in a search.
- You retrieve bids and recommendation for the resource request.
- You add the resource request to the resource row.

A more detailed discussion of the information that appears for each resource request row appears later in this topic.

See Evaluating Resource Requests.

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Filtering and Expanding the Resource List

You can choose a filter, located under **Hello <User Name>** on the Staffing Workbench - Manage Utilization page, to view subsets of the resources in the work space. Filters control the number of resources who appear in the **Resources** scroll area or in the chart views. When you select a filter that limits the list of resources, such as resources who are unassigned, the resources who do not meet the filter criteria do not appear in the list or chart. The number of resources who are included in a filter appears next to the filter name.

If you are a member of the selected resource group, you can select an option on the My Workbench Options - Utilization page to include your name in the list of resources.

Field or Control	Description
All	Click to view all resources who belong to the specified resource group. This filter provides a snapshot of the assignment status of all members of the resource group, regardless of whether the resources are currently on assignment.
Unassigned	Click to view a subset of resources who are not working on an assignment at the time.
Ending Assignments	Click to view a subset of resources who are currently on an assignment that is ending within the number of days that you specify on the My Workbench Options - Utilization page.
Selected Resources	Click after selecting the check box beside the resources that you want to appear in the **Resources** work space. To remove another resource from this filter, deselect the resource check box and click **Selected Resources** again.

You can use the toolbar—located just above and below the **Resources** scroll area—to expand all resource rows so that you can view or act on resource requests that are associated with the resources. You can also display results from Resource Matching, retrieve bids and recommendations, or clear the requests from the work space and start again.

Field or Control	Description
	Click **Select All** to select all resources who appear in the work space.
	Click **Deselect All** to deselect all resources who appear in the work space.
	Click **Expand All** to expand all resource summary rows in the work space.
	Click **Collapse All** to collapse all resource summary rows in the work space.

When you enter the Staffing Workbench - Manage Utilization page, the list of resources appears in a grid format. You can switch to a chart format at any time and then switch back to the grid format. The same resources appear regardless of the view that you select. If you select a different filter while any chart view is active, the resources in the chart view reflect the new filter.

A more detailed discussion of charts appears later in this topic.

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See Reviewing Utilization Charts.

Field or Control	Description
	Click **Resources Grid** to view the list of resources in a grid format in the **Resources** scroll area. This is the default view for the Staffing Workbench - Manage Utilization page. The icon appears only if the active view is not the Resources scroll area.
	Click **Unassigned Resources** to view the Unassigned Resources chart—a graphical representation of the assignment status of resources who appear in the active filter. The icon appears only if the active view is not the Unassigned Resources chart.
	Click **Chart Resource Schedules** to view the Resource Schedule chart—a graphical representation of the schedules for the resources who appear in the active filter. The icon appears only if the active view is not the Resource Schedule chart.
	Click **Scheduled Utilization** to view the Scheduled Utilization chart—a graphical representation of scheduled utilization and optimal capacity for the resources who appear in the active filter. The icon appears only if the active view is not the Scheduled Utilization chart.
	Click **Resource Schedule Grid** to view the resource schedule information in a grid format.

When you enter the page, the resources that you specify on the My Workbench Options - Workbench page appear in the **Resources** scroll area. You can select a different active resource group from the **Resource Group Name** options. You can also access the Resource Group Definition - Resource Groups page to modify or add a resource group and return to the Staffing Workbench.

Field or Control	Description
Resource Group Name	Enter a new group of resources to populate the **Resources** scroll area. If actions are pending on existing resources in the scroll area, you are prompted to save the actions before proceeding. All of the resources in the scroll area are replaced with the resources in the new resource group.

Searching for Assignments for Resources

There are three ways to find resource requests that are appropriate for available resources on the Staffing Workbench:

- Retrieve resource requests for the selected rows based on search options and each resource's factor fit scores for the request.

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This feature uses Resource Matching to find resource requests that match the qualifications, availability, and preferences of the selected resources.

- Retrieve resource requests for which the selected resources are recommended or for which they have entered a bid.
- Add a resource request to a resource row.

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

Field or Control	Description
	Click **Search for Requests for selected Resources** to retrieve open resource requests for the selected resources based on search options and each resource's factor fit scores for the request. Specify search options at search time. Resource Matching calculates factor fit scores for each resource-and-resource-request combination. The system returns resource requests that meet the criteria for a resource. The requests appear in the scroll area with the resource row expanded and a visual indicator that the resource requests are a result of a Resource Matching search. A message appears for each selected row stating the number of resource requests that the system finds in the search results for the resource.
	Indicates that the corresponding resource request was returned in the search results from Resource Matching.
	Click **Retrieve Bids and Recommendations for selected Resources** to retrieve resource requests for which the selected resources entered a bid or received a recommendation. The system returns resource requests that meet the criteria. The requests appear in the scroll area with the resource row expanded and a visual indicator that the resource entered a bid or received a recommendation for the corresponding resource request.
	Indicates that the resource entered a bid or received a recommendation for the corresponding resource request. Move the mouse pointer across the visual indicator to view the alternate text, which indicates if the resource submitted a bid or was recommended for the resource request.
	Click **Clear Unwanted Requests for selected Resources** to clear from selected resource rows the resource requests for which no action is selected. Users should erase the unwanted requests or resources for whom no action is selected if there is any change to the search options.

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This button appears for each resource row in the work space:

Field or Control	Description
Add Request	Click to add a resource request for a resource row. Select the resource request and return to the workbench to enter the appropriate action.

The following sections provide more details on how to find work for resources by using the Staffing Workbench:

Retrieve Resource Requests Based on Factor Fit Scores

Expand the Search Options and Search Settings collapsible group boxes on the Staffing Workbench - Manage Utilization page.

This example illustrates the fields and controls on the Search Options and Search Settings collapsible group boxes on the Staffing Workbench - Manage Utilization page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> Search options and search settings apply only when you click **Search for Requests for selected Resources** to perform a search using Resource Matching.

To populate the workbench with resource requests based on a resource's factor fit scores:

1. In the **Search Options** collapsible group box, specify the search options that indicate which resource requests that Resource Matching needs to evaluate when it searches for work for the resources. You can direct your search to:
   - **All Requests:** Click to have Resource Matching evaluate all open requests as potential matches for the resource.
   - **Requests I Own:** Click to have Resource Matching evaluate open resource requests for service orders that specify you—that is, the user that is logged into the system—as the person responsible for staffing the order.
   - **Owning Organization:** Click to have Resource Matching evaluate open resource requests with a service order owning organization that includes the resource's organization.

     For example, if the organizational unit is department, Resource Matching evaluates any open resource requests that specify the resource's department or a parent department as the owning organization on the service order.
2. In the **Search Settings** collapsible group box, assign the relative priorities to the **Availability, Preferences,** and **Qualifications** factor family fit scores for this search session, and identify the number of results that are to be returned.

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Select a priority greater than *0 - Not at all important* for at least one factor family.

3. Select the resource rows for which you want to search for resources.
4. Click **Search for Requests for selected Resources.**

If selected resources are matched with resource requests based on the specified search options and the resources' factor fit scores, the resource requests appear in the **Resources** scroll area with the row expanded.

The priorities that you specify during the search session are included in each resource's overall fit score calculations. The resource requests appear in descending order of the resource's overall fit score, which measures how well a resource fits the specified qualifications, availability, and preferences; accounting for the organization's priorities; and the priorities that you specify during the search session. If you change the priorities and search again, Resource Matching recalculates overall fit scores, which potentially changes the order of resource requests.

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

See Overall Fit Score.

Retrieve Resource Requests Based on Resource Bids and Manager Recommendations

To populate the workbench with requests that received a bid from one of your resources or a recommendation for one of your resources:

1. Select the resources for which you want to view bids or recommendations.
2. Click **Retrieve Bids and Recommendations.**

If selected resources bid or were recommended for requests, the requests appear in the work space with the resource row expanded and a visual indicator that the resource submitted a bid or received a recommendation.

You can submit a recommendation for a resource directly on the resource request or from the Staffing Workbench - Manage Utilization page. A resource can submit a bid for a resource request from the Job Spy page.

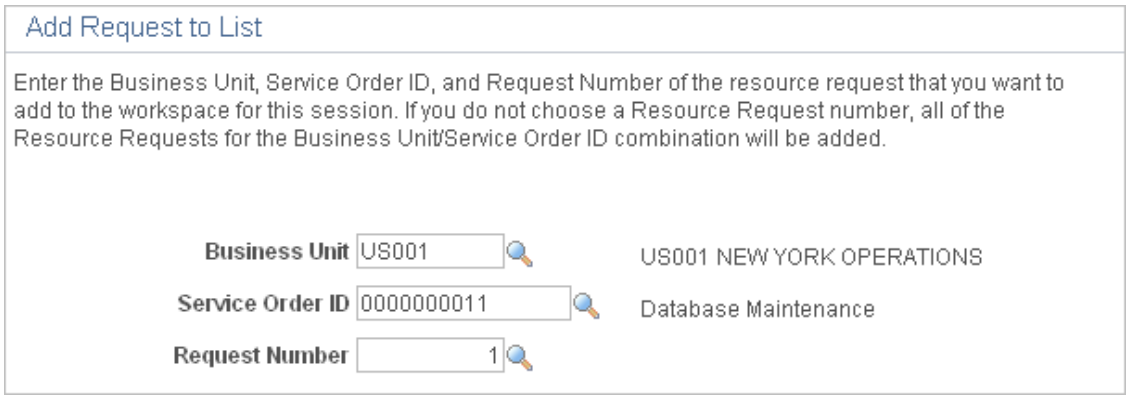
> **Note**
>
> Search settings that you specify on this page do not impact the scores of the requests that are retrieved through Resource Bids and Manager Recommendations.

Add a Resource Request to the Work Space

Click the **Add Request** button on a corresponding resource row to access the Staffing Workbench - Add Request to List page.

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This example illustrates the fields and controls on the Staffing Workbench - Add Request to List page.



To directly add resource requests to the work space for a resource:

1. Enter the business unit of the service order that you want to locate.

   You must enter the business unit first, because it determines the list of valid service orders.
2. Click the **Look up Service Order ID** icon to select the service order.

   You can search for the service order by the person responsible for staffing it, customer ID or name, description, project, service order ID or status, or by the user ID of the person who created the order.
3. Click **Look up Request Number** icon to select the resource request.

   If no value is selected, all resource requests that are associated with the selected business-unit-and-service-order combination are added to the **Resources** work space when you click **OK.**
4. Click **OK.**

The selected resource requests appear in the work space under the selected resource summary row.

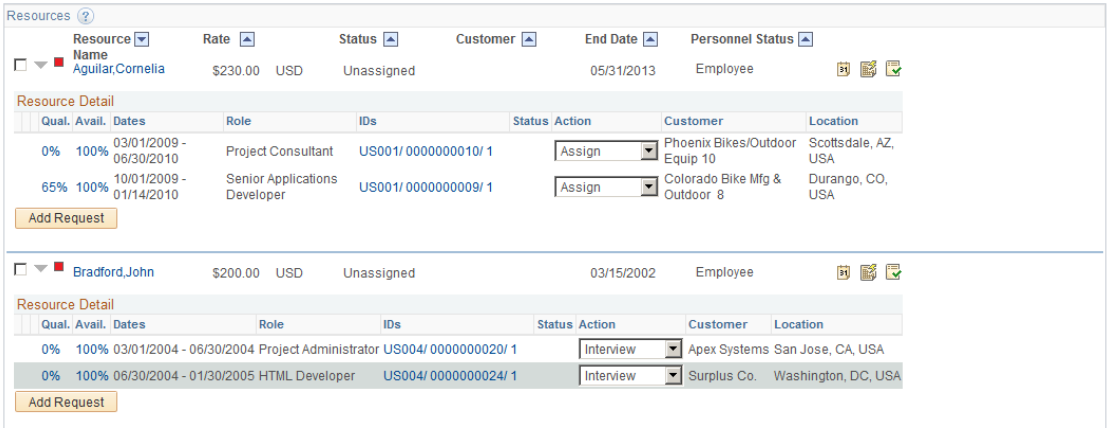
> **Note**
>
> Search settings that you specify on this page do not impact the scores of the requests that are added to the work space through Add Request.

Evaluating Resource Requests

Resource requests that meet the search criteria for a resource appear under the resource summary row.

This example illustrates the fields and controls on the Expanded Resources scroll area on the Staffing Workbench - Manage Utilization page. You can find definitions for the fields and controls later on this page.

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If selected resources are matched with resource requests based on the specified search options and the resource's factor fit scores, the requests appear in the work space with the row expanded. You can click **Selected Resources** to hide all other resource rows from view.

Expanded rows display basic information about resource requests, the resource's factor fit scores for the request, the assignment status (if applicable), and a link to the resource request.

Field or Control	Description
Qual. (qualification) and **Avail.** (availability)	Displays the qualification and availability factor family fit scores, which indicate how closely the resource's profile and schedule match the resource request. The qualification fit score is made up of the qualifications and preferences factor family fit scores. Click either fit score link to access the Job Scorecard for <Resource> page and view details about requirements that are included in the resource's fit score calculation for each factor family. **Note:** The qualification score that is retrieved by the search on the workbench is a reflection of how well the requests match the resource—not how well the resource matches a particular request. This allows a more accurate set of requests that will maximize the utilization of a resource's qualifications and preferences. Because the Job Scorecard is leveraged by many different parts of the system, it is important to note that the scores contained in it are from the resource request perspective—how well a resource matches a particular request. Therefore, the Job Scorecard scores may vary from the Manage Utilization search results. See Job Scorecard for <Resource> Page.
Dates	Displays the start date and end date of the resource request. If multiple date ranges are indicated on the request, this column displays the earliest start date and latest end date of the indicated date ranges.
Role	Displays the project role that is specified on the resource request.

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Field or Control	Description
IDs	Displays a concatenation of the service order business unit, the service order ID, and the resource request ID. Click the ID link to access the service order and view the order information. Depending on your security access, you can recommend the resource for the resource request. To return to the Staffing Workbench, click **Save** on the Order Summary or Resource Requests page, or click **Return to Staffing Workbench.**
Status	Displays the assignment status if the resource is assigned to the resource request during the current search session. Otherwise, this column indicates that the resource is being considered for this resource request, or is blank. *Considering:* This value appears if you saved an action to consider this resource as a possible match for the resource request. An assignment is not created when you consider a resource for a resource request, and therefore a value of *Considering* in this field is not treated as an assignment status. **Note:** The search settings that you specify on the workbench do not impact the scores of the requests that appear in the **Resources** scroll area with a value in the **Status** column.

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Field or Control	Description
Action	Select the appropriate action to take on the resource. Available values are based on the resource's current assignment status and your user role security. Values are: *Assign:* Select to assign the resource to the resource request. The assignment appears on the confirmation pages for you to edit and verify. If assignment approval workflow is enabled, the assignment is automatically routed to the resource manager or project manager for approval after you save and confirm the actions on the workbench. If assignment approval workflow is not enabled, or if the user that is logged into the system is the required approver, the assignment can be saved with the status *Assigned* without triggering assignment approval workflow. *Interview, Propose,* or *Reserve:* Select to create an assignment for the selected resource as soon as you save the actions on the workbench. The assignment appears on the confirmation pages for you to edit and verify. *Consider* or *Recommend:* Select to associate the resource with the resource request as one that you are considering as a possible match, or recommending for the resource request. These are not assignment statuses. An assignment is not created if you select one of these values. If you don't have the security access to create assignments, *Consider* and *Recommend* are the only available actions. *Cancel:* Select to cancel an existing assignment. *Complete:* Select to complete an assignment that is in an *Assigned* status. See Assignment Statuses.
Customer	Displays the customer name that is specified on the service order.
Location	Displays the assignment location that is specified on the resource request.

Reviewing Utilization Charts

PeopleSoft Resource Management provides real-time analyses that you can view from the workbench to aid in managing utilization of resources. All of the views on this page contain the resources who appear in the active filter—all resources, unassigned resources, resources with ending assignments, or only selected resources. If you select a filter while the **Resources** scroll area is active and then you switch to a chart view, the same filter is used to display resources in the chart. If you view a chart view and select a new filter, then revert back to the **Resources** scroll area, the resources that belong to new filter appear in the scroll area.

From the workbench, you can view graphical representations of:

- Unassigned resources.

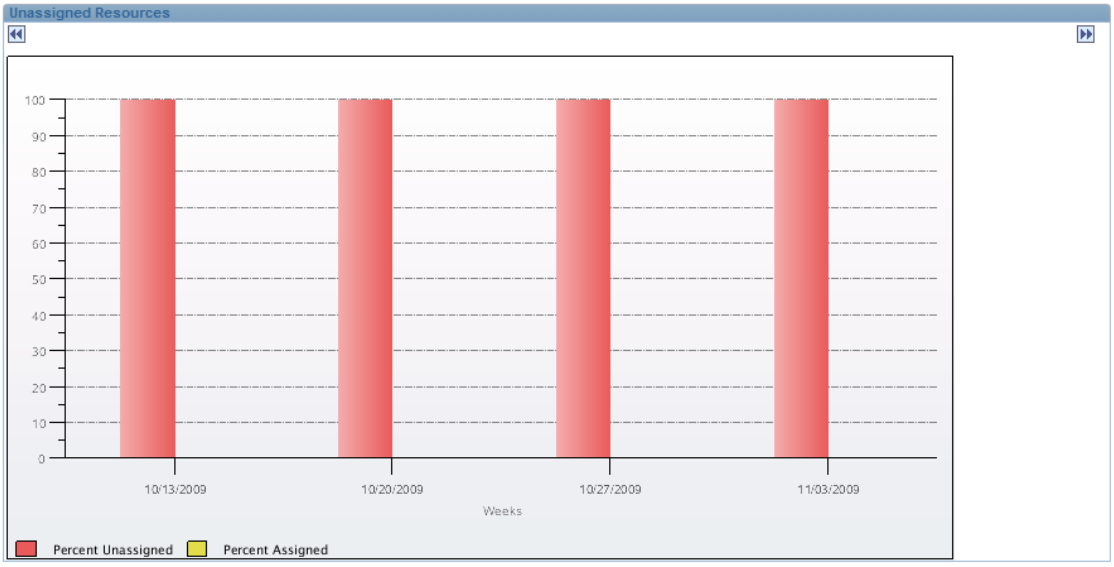
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- Resource schedules.
- Scheduled utilization.

Unassigned Resources Chart

Access the Unassigned Resources chart view on the Staffing Workbench - Manage Utilization page.

This example illustrates the fields and controls on the Unassigned Resources chart view.



The Unassigned Resources chart represents the assignment status of the resources who appear in the active filter. You specify the threshold on the My Workbench Options - Utilization page that determines when a worker is treated as assigned. The chart displays the percentages of resources who are assigned and unassigned for the next four weeks, with navigation icons to scroll to the next or previous four-week period.

Move the cursor across each bar section to view alternate text about the number of resources assigned (the yellow portion of the bar) or unassigned (the red portion of the bar).

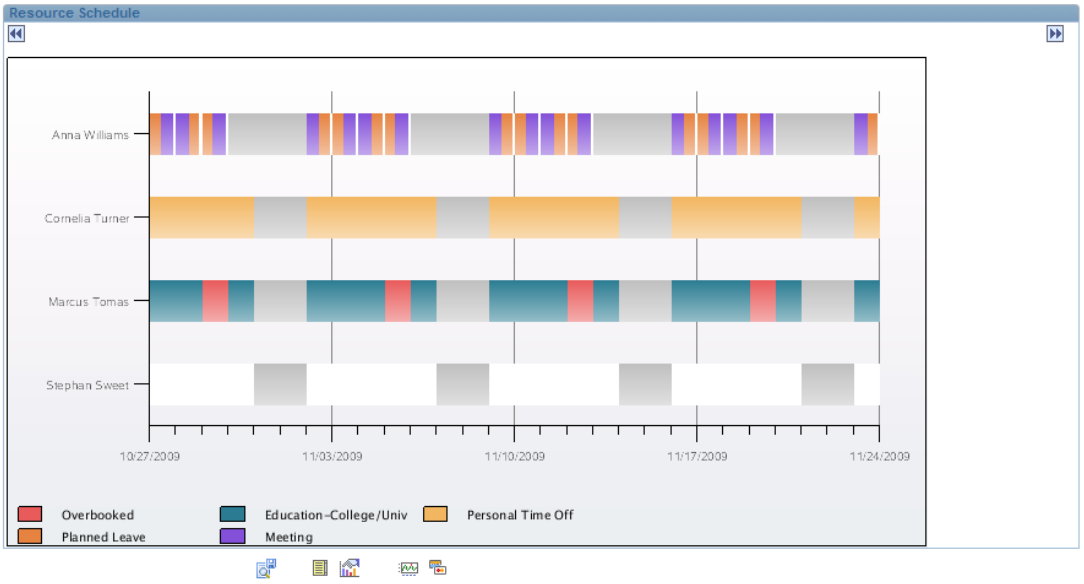
Click the assigned or unassigned portion of a bar to return to the **Resources** scroll area with the **Selected Resources** filter active and the resource rows selected for all of the resources included in that portion of the bar.

Resource Schedule Chart

Access the Resource Schedule chart view on the Staffing Workbench - Manage Utilization page.

This example illustrates the fields and controls on the Resource Schedule chart view.

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The Resource Schedule chart represents the schedules of the resources who appear in the active filter. The chart displays schedules for a four-week period beginning with the current date, and navigation icons to scroll to the next or previous four-week period.

You specify task categories and corresponding chart colors on the My Workbench Options - Utilization page. If there are no task categories specified on the My Workbench Options - Utilization page, the Resource Schedule chart displays the default task categories and colors that are specified during implementation on the Installation Options - Resource Management page.

Move the mouse pointer across each chart section to view alternate text about the unavailable time (gray), available time (white), or overbooked time (red) for that period. Move the mouse pointer over a task on the chart to view alternate text about the customer name and assignment, or the appointment description.

Click an assignment task bar to access the Assign Resource page. View or modify the assignment as required, and save your changes to return to the workbench. Changes are reflected on the Resource Schedule chart when you refresh the chart, which occurs when you click a navigation icon to scroll to the next or previous four-week period.

Click the overbooked time to access the Assignments for <Resource> page to view a list of the resource's existing assignments in any status. Click **Cancel** to return to the workbench.

Click an appointment task bar to access the Appointment Details page. You can view the appointment and click **Cancel** to return to the workbench, or modify the appointment and save your changes to return to the workbench.

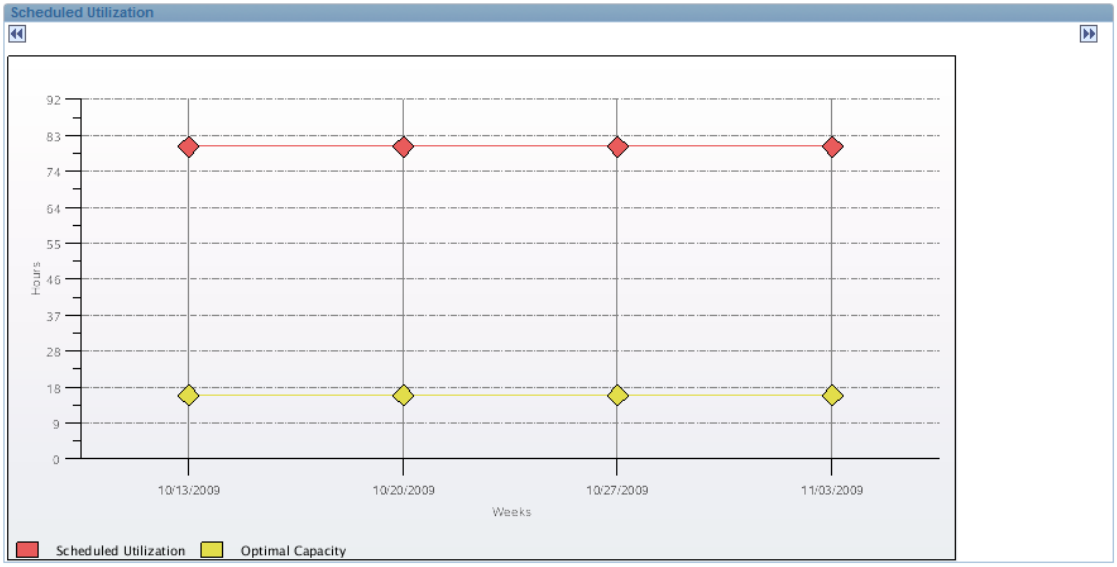
Click the unassigned portion of the chart to return to the **Resources** scroll area with the Selected Resources filter active and the resource row for the applicable resource selected.

Scheduled Utilization

Access the Scheduled Utilization chart view on the Staffing Workbench - Manage Utilization page.

This example illustrates the fields and controls on the Scheduled Utilization chart view.

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The Scheduled Utilization chart compares the scheduled utilization with the optimal capacity for the resources who are included in the active filter.

Utilization represents the total number of hours that the resources on the chart are scheduled to work—or have already worked—during the chart period on the tasks designated as utilized time. You select the task categories to include in the analysis on the My Workbench Options - Utilization page.

Capacity is the total number of hours that the resources are available to work in the chart period as defined by the Standard Hours field (STD_HOURS) on the Job record (JOB) for the employee. On the My Workbench Options - Utilization page, you specify the percentage of capacity that is required for a resource to be treated as optimally utilized.

The chart displays hours for a four-week period beginning with the current date, and navigation icons to scroll to the next or previous four-week period.

Move the mouse pointer across the chart to view alternate text about the scheduled utilization hours (red) and optimal capacity hours (yellow) for the chart period for the resources who appear in the work space.

Performing Actions

To perform an action on the Staffing Workbench - Manage Utilization page:

1. In the **Resources** scroll area of the grid view, select the check box for the resource summary rows on which you want to perform an action.
2. Select an action for the resource-and-resource-request combinations for selected resource summary rows.
3. Click **Save Actions for all selected items** to perform the actions on the selected resource summary rows.

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> **Note**
>
> When you save actions on one workbench page, the unsaved actions are performed on all workbench pages. For example, if you have access to the Staffing Workbench - Manage Utilization page and the Staffing Workbench - Fulfill Resources page, any actions that you select for a resource-and-resource-request combination on either page are performed when you save either page. The actions from both pages are listed on the Staffing Changes Confirmation page and the Update Confirmation page.

When you save the work space and accept the confirmation pages:

- If there is no existing assignment for this resource-and-resource-request combination, and if you selected an action status of *Assign,* the system:
  - Creates a new assignment with the indicated status if assignment approval workflow is not enabled, or if the user that is logged into the system is the required approver.
  - Automatically routes the assignment to the required approver if assignment approval workflow is enabled.
- If there is no existing assignment for the resource-and-resource-request combination, and if you selected an action status of *Interview, Propose,* or *Reserve,* the system creates a new assignment with the indicated status.
- If you selected an action status of *Recommend,* the system associates this resource with the resource request as a recommendation. The recommendation appears:
  - On the Service Order - Recommend Resources page on the resource request.
  - In the Recommendations filter on the Assignments for <Resource> page.
  - In the Recommendations filter on the My Assignments - Assignments page.
  - In the **Requests** scroll area on the Staffing Workbench - Fulfill Orders page when you retrieve resources based on recommendations.
  - In the **Resources** scroll area on the Staffing Workbench - Manage Utilization page when you retrieve resource requests based on recommended resources.
- If you selected an action status of *Consider,* the system saves the record to associate this resource with the resource request as a possible candidate.

  An assignment is not created for an action status of *Consider.*

  > **Note**
  >
  > Resources who have the status of *Consider* are only associated with the resource request on the Staffing Workbench. This information does not appear anywhere else in the system. These resources appear in the workbench each time the resource request appears until their status changes or the associated resource request is closed or canceled.

- If the resource is already assigned to this resource request, the system updates the assignment with the new status.

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Confirming Actions

When you save the actions on the Staffing Workbench, the Staffing Changes Confirmation page appears and explains the changes to be made for every selected resource. When you accept the changes, the Update Confirmation page appears and confirms that the changes were successful.

Use these pages to confirm that:

- An assignment is created for an action of *Assign, Interview, Propose,* or *Reserve* for a resource who is not already assigned to this resource request.
- If assignment approval is required, the status of the assignment changes to *Pending Approval.*
- The status of an existing assignment for a resource is changed according to the specified action.
- Any workflow that is associated with the status change is invoked when you confirm the staffing changes.
- Assignment history is updated when you confirm the staffing changes.

Staffing Changes Confirmation

Access the Staffing Changes Confirmation page (save an action on the Staffing Workbench - Manage Utilization page).

> **Note**
>
> The information that appears on the Staffing Changes Confirmation page and Update Confirmation page differs based on the source of the action. If you initiate an action from the Staffing Workbench - Manage Utilization page, the resource description appears at the top of the update section on the confirmation pages. If you initiate an action from the Staffing Workbench - Fulfill Orders page, the resource request description appears at the top of the update section on the confirmation pages.

The fields on the Staffing Changes Confirmation page behave the same as the ones on the Staffing Workbench - Fulfill Orders page.

See Confirming Actions.

Update Confirmation

Access the Update Confirmation page (click OK on the Staffing Changes Confirmation page).

Verify the changes and confirm that they occurred as expected. Click **Return to Staffing Workbench** to return to the work space and view the changes.

Assignments that are created from in the Staffing Workbench are populated with values from the resource request, and the system places the resource on the assignment with the designated action status. New assignment statuses for the resources appear in the **Status** column on the associated resource request rows in the **Resources** scroll area until you refresh the workbench.

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> **Note**
>
> If you select the action *Assign* and assignment approval is required, the assignment status is *Pending Approval* if you view the assignment from the Staffing Workbench - Fulfill Orders page, Assignments for <Resource> page, or Assign Resource page. The assignment remains in a pending status until it is approved by the resource's manager or canceled.

Defining Supply Category Analytics

This topic provides an overview of supply category analytics and discusses how to define supply category analytics.

Pages Used to Define Supply Category Analytics

Page Name	Definition Name	Usage
Supply Category Analytic (parameters) Page	RS_OCP_POOL_SELECT	Select pools from which to include data for supply category analytics. Define the start date, number of months to display, and data sorting options.
Search for Pools Page	RS_OCP_POOL_SEARCH	Search for pools to add to the supply category analytic.
Supply Category Analytic Page	RS_OCP_ANALYTIC	View the supply category analytics.
Supply Category Analytic Details Page	RS_OCP_ANALYTIC_DTL	View detail supply category analytic data.
Master Resource Schedule Page	PGM_MRS_SCHED	View the supply details in the master resource schedule.

Understanding Supply Category Analytics

One of the key tools for an IT organization is the ability to view supply category capacity, allocation, and availability of resources by time period at the organizational and resource pool level. It is also important to be able to view project assignments as well as task assignments on the resource usage analytic.

Pool managers can quickly and easily view the availability of the resources in their pool for a given time period. The supply category analytic can be generated for a maximum of six months.

Supply Category Analytic (parameters) Page

Use the Supply Category Analytic (parameters) page (RS_OCP_POOL_SELECT) to select pools from which to include data for supply category analytics.

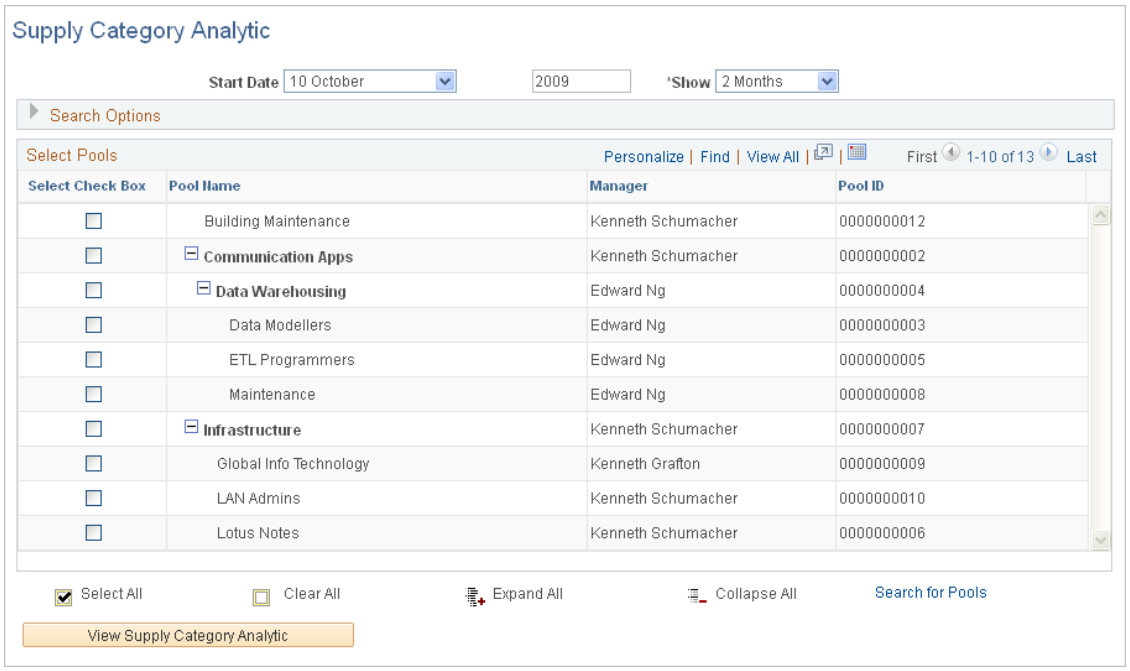
Define the start date, number of months to display, and data sorting options.

Navigation:

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Resource Management, and then **Manage Resource Pools**, and then **Supply Category Analytics**, and then **Supply Category Analytic**

This example illustrates the fields and controls on the Supply Category Analytic parameters page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Start Date	Enter the month and year from which the system will generate and display the supply category analytic.
Show	Enter the time frame for which system will generate the analytic, from *1 Month* to *6 Months*.
Search Options	Expand this group box and select attributes to specify how the analytic data is grouped and displayed, using the **Sort By** and **Then By** fields to specify a supply category. You can select a primary and a secondary attribute to generate and view the data using the **Group By** and **View In** options.
Select Pools	Select the corresponding check boxes for each pool name for which the system will generate the analytic. All active resource pools in the system appear in this group box. If you select a parent pool, the system automatically selects its children as part of the analytic scope. You can select child pools independent of the parent pool. Only the pools that are selected on this page are in the scope for the supply category analytic.

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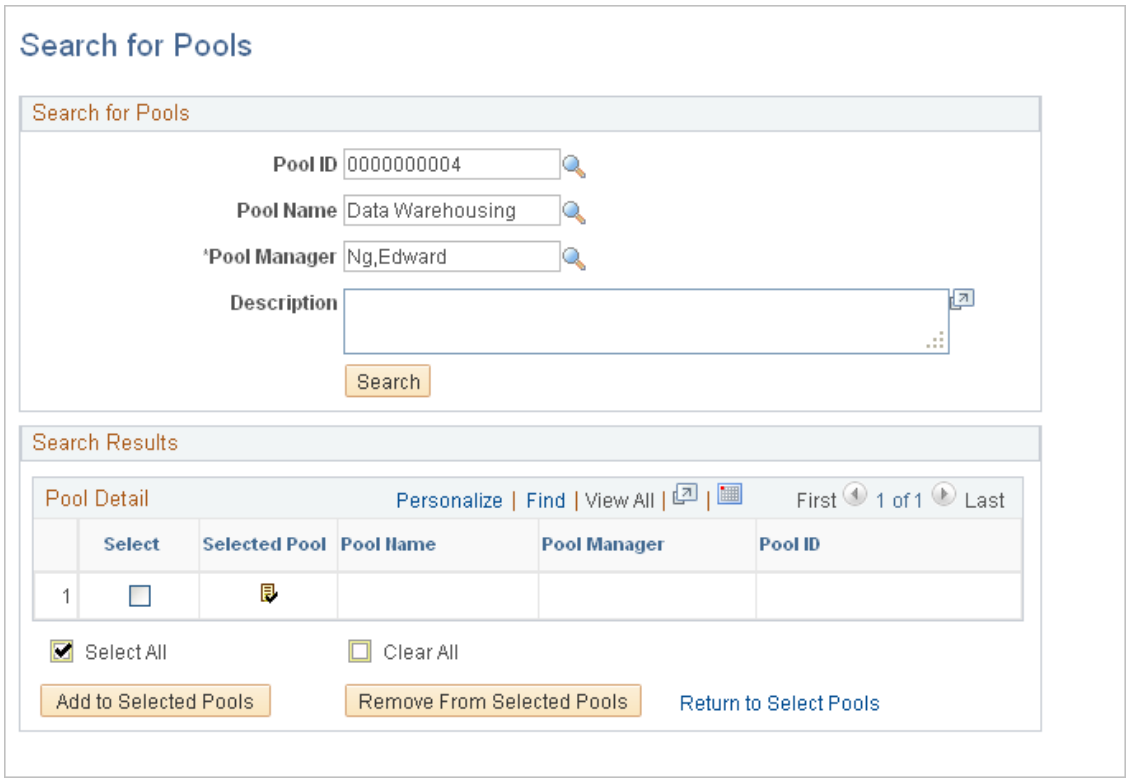
Search for Pools Page

Use the Search for Pools page (RS_OCP_POOL_SEARCH) to search for pools to add to the supply category analytic.

Navigation:

Click the **Search for Pools** link on the Supply Category Analytic parameters page.

This example illustrates the fields and controls on the Search for Pools page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Search for Pools	Search for pools by pool name, manager, ID and description to find and select pools to add to the supply category analytic. The search results appear in the **Search Results** group box. The list of pools in the **Search Results** group box is not hierarchical.
Select	Select the check box for each pool in the search results that you want to add to the supply category analytic scope.
	The **Selected Pool** icon indicates that the corresponding pool is selected on the Supply Category Analytic parameters page.

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Field or Control	Description
Add to Selected Pools	Click to add the selected pools to the Supply Category Analytic parameters page with the check box selected. If you select a parent pool, the system automatically selects the child pools.
Remove From Selected Pools	Select rows that have the **Selected Pool** icon, and click **Remove From Selected Pools** to remove the selected pools from the Supply Category Analytic parameters page.
Return to Select Pools	Click to return to the Supply Category Analytic parameters page.

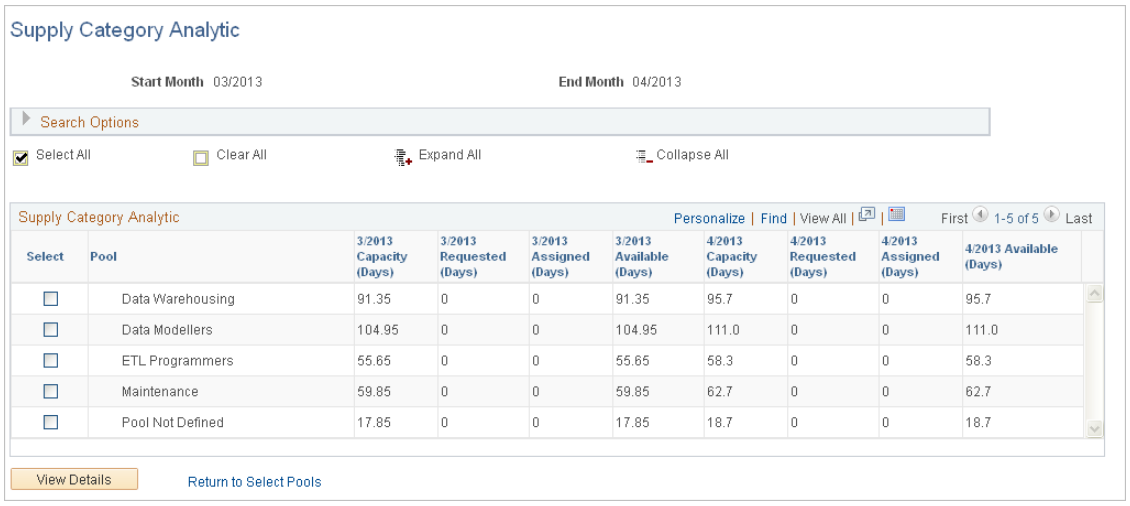
Supply Category Analytic Page

Use the Supply Category Analytic page (RS_OCP_ANALYTIC) to view the supply category analytics.

Navigation:

Click the **View Supply Category Analytic** button on the Supply Category Analytic parameters page.

This example illustrates the fields and controls on the Supply Category Analytic page. You can find definitions for the fields and controls later on this page.



Select the rows for which you want to drill down to view details.

If you sort by *Region* then by *Project Role,* when you select a region, the system selects all roles that belong to that region.

Field or Control	Description
<**description**>	The title of the second column in the **Supply Category Analytic** group box is based on the values that you select for the **Sort By** and **Then By** sort options.

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Field or Control	Description
Capacity	Displays the resource capacity based on the selected sort and group options. For example, if you select a **Sort By** option of *Region*, a **Then By** option of *Project Role*, and a **Group By** option of *Weekly*, this column displays the capacity of each role in the region for each calendar week for the time frame between the start month and the end month. The **Start Month** and the **View In** unit also appear in the column heading.
Requested	Displays the requested days or hours based on the selected sort and group options. For example, if you select a **Sort By** option of *Region*, a **Then By** option of *Project Role*, and a **Group By** option of *Weekly*, this column displays the requested days or hours of each role in the region for each calendar week for the time frame between the start month and the end month.
Assigned	Displays the assigned days or hours based on the selected sort and group options. For example, if you select a **Sort By** option of *Region*, a **Then By** option of *Project Role*, and a **Group By** option of *Weekly*, this column displays the assigned days or hours of each role in the region for each calendar week for the time frame between the start month and the end month.
Available	Displays the difference between capacity and assigned days or hours based on the selected sort and group options. For example, if you select a **Sort By** option of *Region*, a **Then By** option of *Project Role*, and a **Group By** option of *Weekly*, this column displays the difference between capacity and assigned days or hours of each role in the region for each calendar week for the time frame between the start month and the end month.
View Details	Click to view the details for selected resources, which make up the capacity for a supply category.

Supply Category Analytic Details Page

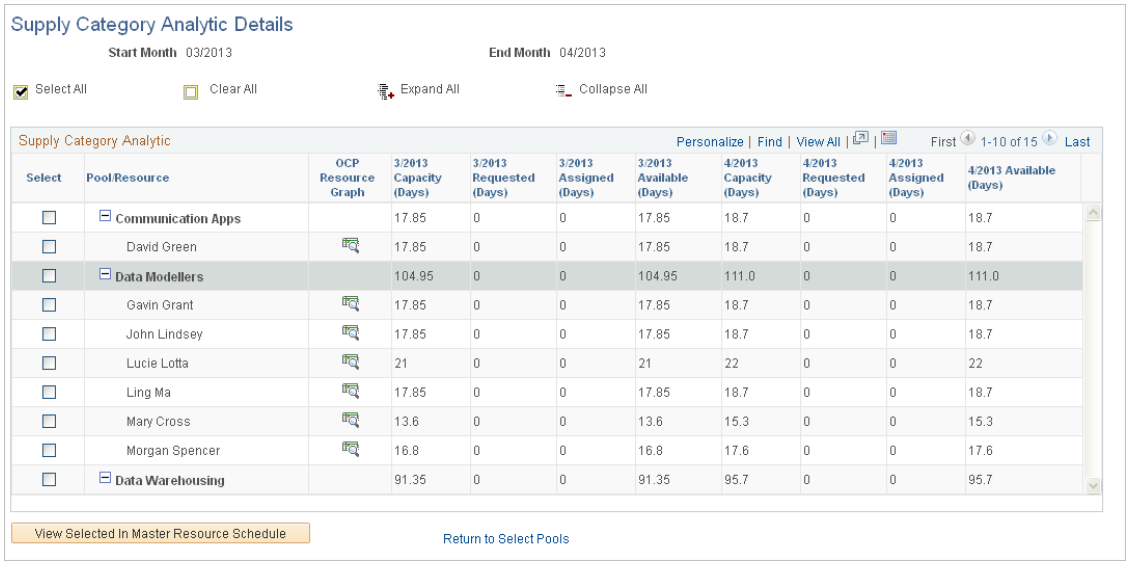
Use the Supply Category Analytic Details page (RS_OCP_ANALYTIC_DTL) to view detail supply category analytic data.

Navigation:

Click the **View Details** button on the Supply Category Analytic page.

This example illustrates the fields and controls on the Supply Category Analytic Details page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
	Select the resources to include in the resource scope of the master resource schedule, and click **View Selected In Master Resource Schedule** to view the schedule of the selected resources.
	Click to access the Operational Capacity Analytic chart for the corresponding resource.
View Selected In Master Resource Schedule	Click to view the master resource schedule for the selected resources.

Master Resource Schedule Page

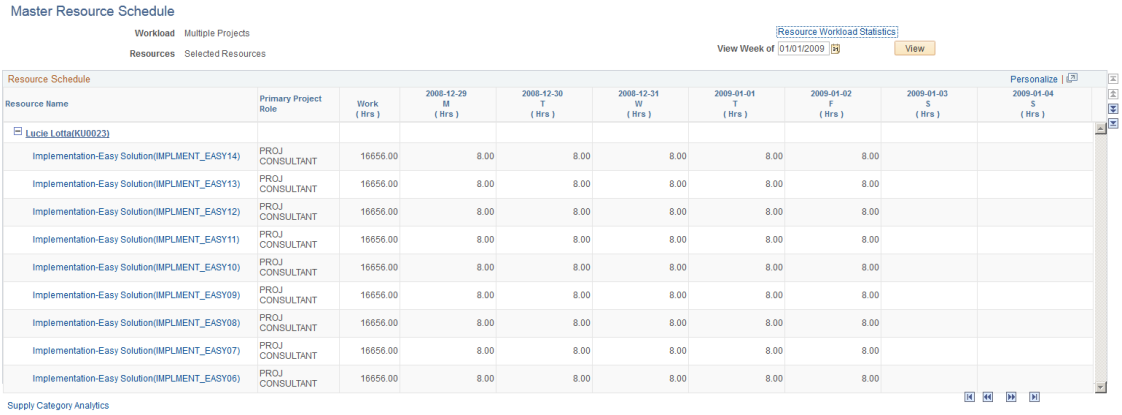
Use the Master Resource Schedule page (PGM_MRS_SCHED) to view the supply details in the master resource schedule.

Navigation:

Click the **View Selected In Master Resource Schedule** button on the Supply Category Analytic Details page.

This example illustrates the fields and controls on the Master Resource Schedule page.

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Master Resource Schedule

Workload Multiple Projects

Resources Selected Resources

Resource Workload Statistics

View Week of 01/01/2009 View

Resource Schedule

Personalize

Resource Name	Primary Project Role	Work (Hrs)	2008-12-29 M (Hrs)	2008-12-30 T (Hrs)	2008-12-31 W (Hrs)	2009-01-01 T (Hrs)	2009-01-02 F (Hrs)	2009-01-03 S (Hrs)	2009-01-04 S (Hrs)
Lucie Lotta(KU0023)									
Implementation-Easy Solution(IMPLMENT_EASY14)	PROJ CONSULTANT	16656.00	8.00	8.00	8.00	8.00	8.00		
Implementation-Easy Solution(IMPLMENT_EASY13)	PROJ CONSULTANT	16656.00	8.00	8.00	8.00	8.00	8.00		
Implementation-Easy Solution(IMPLMENT_EASY12)	PROJ CONSULTANT	16656.00	8.00	8.00	8.00	8.00	8.00		
Implementation-Easy Solution(IMPLMENT_EASY11)	PROJ CONSULTANT	16656.00	8.00	8.00	8.00	8.00	8.00		
Implementation-Easy Solution(IMPLMENT_EASY10)	PROJ CONSULTANT	16656.00	8.00	8.00	8.00	8.00	8.00		
Implementation-Easy Solution(IMPLMENT_EASY09)	PROJ CONSULTANT	16656.00	8.00	8.00	8.00	8.00	8.00		
Implementation-Easy Solution(IMPLMENT_EASY08)	PROJ CONSULTANT	16656.00	8.00	8.00	8.00	8.00	8.00		
Implementation-Easy Solution(IMPLMENT_EASY07)	PROJ CONSULTANT	16656.00	8.00	8.00	8.00	8.00	8.00		
Implementation-Easy Solution(IMPLMENT_EASY06)	PROJ CONSULTANT	16656.00	8.00	8.00	8.00	8.00	8.00		

Supply Category Analytics

The master resource schedule is discussed in the *PeopleSoft Program Management 9.2.*

As resources are added or moved to different pools, or requested or assigned to assignments, you must maintain up-to-date data in the Supply Category Analytics Cache table. To do this, select the **Refresh Supply Category Analytics Cache** option on the Cache Administration - Miscellaneous page and run the process.

> **Note**
>
> When you access the Master Resource Schedule page from the Supply Category Analytic Details page, the Master Resource Schedule may show more work for a resource than the resource's number of assigned days that appears on the Supply Category Analytic Details page. This is because the Master Resource Schedule includes any work where the resource is in a Considered status for the project.

Related Topics

- PeopleSoft Program Management: Working with Master Resource Schedules
- Pages Used to Set Up and Maintain the Search Framework and Resource Matching Cache Tables

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28

Processing Worklist Items

Understanding the Worklist

A worklist is an organized list of the work items that need to be addressed. PeopleSoft Resource Management workbenches—the Staffing Workbench, Pool Manager Workbench, and My Assignments component—contain a Worklist page that displays notifications and actions that are added to the page from PeopleSoft workflow processes. A link to the worklist appears at the top of the workbench to alert you to outstanding items. From the worklist, you can access item details, complete the required actions, and mark items complete.

You can select a item to work on, and the item provides access to the pages that you need. This enables you to bypass other navigation and work directly from the worklist. The target page that appears when you select an item is based on the type of activity that you perform. For example, if you are a resource manager and you receive notification that an assignment date changed for one of your resource's, you access the Assign Resource (approval) page from the worklist if assignment approval workflow is enabled.

The worklist items that appear are based on workflow options that are specified during implementation. Each worklist item identifies the action that generated the workflow. For example, an action of *Recommendation Made* appears on the resource's worklist when a manager recommends the resource to fulfill a resource request.

This table lists PeopleSoft Resource Management worklist actions, a description of the action, the user who typically performs the actions, and the target pages that appear when users select an item:

Worklist Action	Description	User	Target Pages
New Assignment For Approval	Assignment requires approval by the resource manager.	Resource Manager	Assign Resource approval (RS_ASSIGN_APRVL)
Date Change For Approval	Assignment schedule change requires approval by the resource manager.	Resource Manager	Assign Resource approval
New Assignment Created	Notification of new assignment.	Resource	Assign Resource review and schedule update (RS_ASSIGN_UPDDTS)
Assignment Status Change	Notification of assignment status change.	Resource	Assign Resource review and schedule update
Assignment Date Change	Notification of assignment schedule change.	Resource	Assign Resource review and schedule update

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Worklist Action	Description	User	Target Pages
Recommendation Made	Notification of a resource recommendation to fulfill a resource request.	Resource	Job Detail (RS_WRKR_JOBINFO)
Route to Staffing Person	Service order is ready for fulfillment by the person responsible for staffing the order.	Staffing Coordinator	Order Summary (RS_SO_SUMMARY)
Generic Resource for Approval	Generic resource request is ready for review and approval by pool manager.	Pool Manager	Generic Resource Request approval (RS_GRR_APPRVL)
Date Change for Approval	Generic resource allocation schedule change requires approval by the pool manager.	Pool Manager	Generic Resource Request approval
Status Change for Approval	Generic resource request status change is ready for approval by pool manager.	Pool Manager	Generic Resource Request approval

PeopleTools also provides a worklist that you can access from the folder navigation or from the **Worklist** link in the PeopleSoft universal navigation header. The same worklist items appear on all worklist pages, and you can view and process items from any worklist. The advantage of the PeopleSoft Resource Management worklist is that you can easily alternate between the worklist and other workbench pages. The advantage of the PeopleTools worklist pages is that you can format or filter the list of items, assign a priority to each item, reassign items, and view additional details.

Processing Worklist Items

This topic discusses how to review and process worklist items.

Pages Used to Process Worklist Items

Page Name	Definition Name	Usage
Worklist Page	RS_MYWORKLIST	Review and process assigned worklist items. A variety of worklist items can appear, including items that originate from sources other than PeopleSoft Resource Management.
Worklist for <User ID>: <Resource> (summary view) Page	WORKLIST	View, assign priority to, reassign, and process worklist items. Worklist Page

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Page Name	Definition Name	Usage
Worklist for <User ID>: <Resource> (detail view) Page	WORKLIST_DETAILS	Review additional information about items on a worklist. Worklist Page

Worklist Page

Use the Worklist page (RS_MYWORKLIST) to review and process assigned worklist items.

A variety of worklist items can appear, including items that originate from sources other than PeopleSoft Resource Management.

Navigation:

You can access the Worklist page through multiple navigation paths. This list presents five frequently used paths.

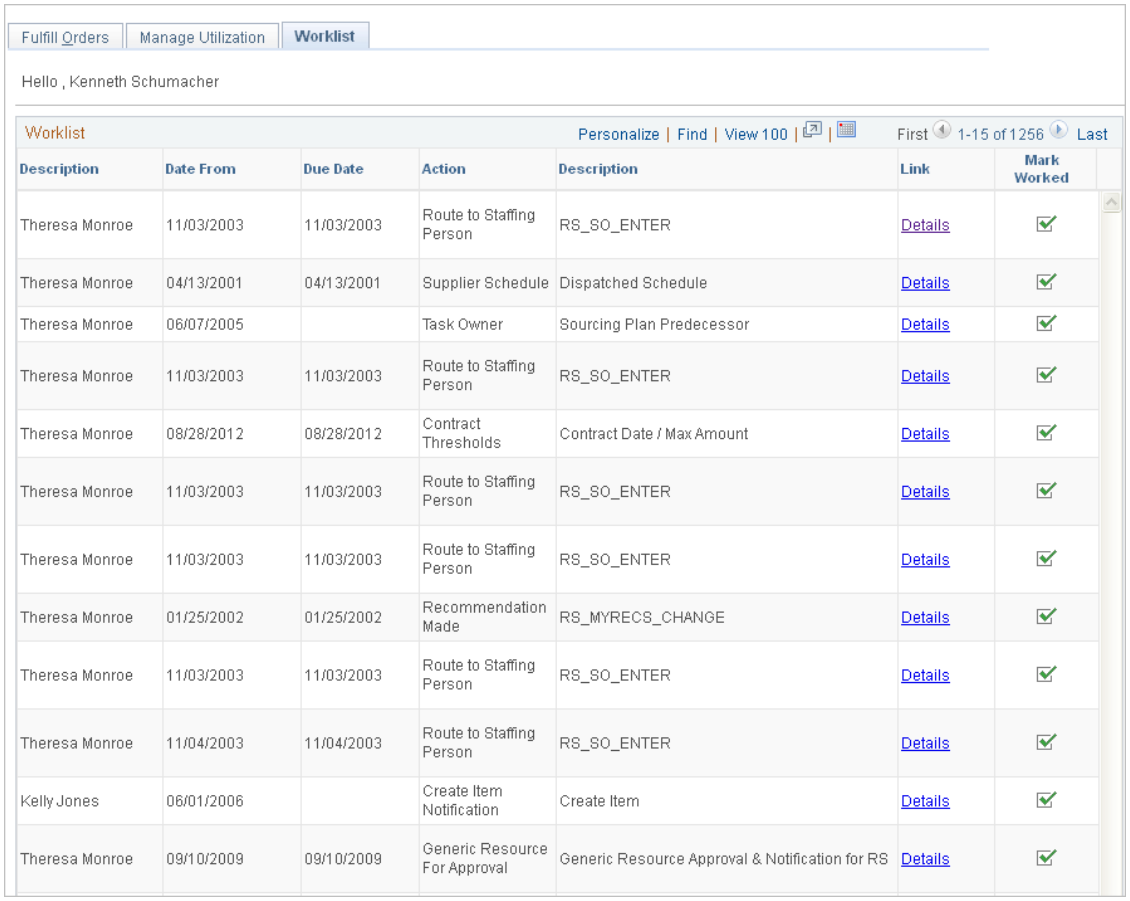
- **Resource Management**, and then **Staffing Workbench**, and then **Worklist**
- **Resource Management**, and then **Staffing Workbench**, and then **Fulfill Orders or Manage Utilization**

  Click the **You currently have <n> unworked items in your worklist** link on the Staffing Workbench - Fulfill Orders page or Manage Utilization page.
- **Resource Management**, and then **My Assignments**, and then **Worklist**
- **Resource Management**, and then **My Assignments**, and then **Assignments**

  Click the **You currently have <n> unworked items in your worklist** link on the My Assignments - Assignments page.
- **Resource Management**, and then **Pool Manager Workbench**, and then **Worklist**

This example illustrates the fields and controls on the Worklist page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Description	Displays the individual who triggered the work item.
Date From	Displays the date when the work item was triggered.
Due Date	Displays the due date of the specified action.
Action	Displays the action that generated the workflow item, such as *Route to Staffing Person.* You can have multiple entries with the same action, but each entry represents a different item that requires attention.
Link	Click a **Details** link in this column to access the target page—the page where you work on the item. The target page is specific to the type of activity that you perform. For example, if the action is *Recommendation Made,* the link accesses the Job Detail page, where you can view information about the resource request.

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Field or Control	Description
Mark Worked	Click an icon in this column to mark an item as worked if you have performed the necessary actions. This removes items that PeopleSoft Resource Management workflow processes generate. **Note:** The worklist may contain items that are generated by workflow processes from other PeopleSoft applications. Depending on how the worklist item is defined, there are different requirements for the actions that must be performed before the item can be removed from the worklist. See *PeopleTools documentation: PeopleSoft Applications User's Guide,* "Using Workflow."

Summary View

You can access a summary view of the PeopleSoft worklist from the folder navigation or from the **Worklist** link in the PeopleSoft universal navigation header. In addition to viewing and processing worklist items, on this page you can hide or rearrange grid columns, filter the items in the view, reassign worklist items, and assign a priority to each worklist item.

Use the PeopleSoft folder navigation to return to the workbench.

Detail View

From the worklist summary view you can drill down to a worklist detail view. In addition to the fields and buttons that are available on the summary view, the detail view includes supplemental information about each item, such as the date and time that you first selected the item to work on, and comments that another user entered if the item was forwarded to you.

Use the PeopleSoft folder navigation to return to the workbench.

See the product documentation for *PeopleTools: Applications User's Guide*

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Using the Resource Self-Service Feature

Understanding the My Assignments Feature

Other topics in this documentation discuss workbenches that are designed primarily for staffing coordinators, resource managers, practice managers, or pool managers to fulfill customer requests and manage resource utilization. As a resource, you also have a uniquely designed workbench containing the tools that you need to review existing assignments and seek new ones.

This section discusses:

- My Assignments feature.
- Job Spy feature.

My Assignments

The My Assignments feature presents a self-service view of PeopleSoft Resource Management data that is specific to a resource. You can review and act on existing or potential assignments on three pages:

- The My Assignments - Assignments page presents assignment-related information with views that display existing assignments, bids, recommendations, and assignment history.

  This is the first page that appears when you access the My Assignments component. The page also displays optional, scaled-down versions of PeopleSoft Resource Management charts that you can select as workbench display options.
- The My Assignments - Job Spy page displays open resource requests that match your qualifications, preferences, and availability. On the My Assignments - Job Spy page, you can review detailed information about an opportunity and submit a bid for the job.
- The My Assignments - Worklist page provides a list of worklist items for your attention.

Job Spy

Job Spy is a PeopleSoft Resource Management tool that resources can use to proactively seek new assignments. This feature uses Resource Matching to provide a ranked list of open resource requests that match the resource's profile and schedule, and the weighting specified for the Availability, Qualifications, and Preferences factor families. You can search through all resource requests or only the requests with a service order owning organization that includes your organization. Once the search results appear, you can drill down and access the Job Detail page to view details of any resource requests in the work space. You can also access the Job Scorecard page to view a detailed evaluation of your qualifications, availability, and preferences compared to resource requests.

By using the Job Spy feature, you can bid on an assignment for the resource request. Bids influence the staffing process in two ways:

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- Staffing coordinators, resource managers, and practice managers can view a list of resources who submit bids for a particular resource request, and they can consider the bids when making their staffing decisions.
- Bids influence the Preferences family factor fit score that is returned by Resource Matching when a staffing coordinator or manager searches for resources to fulfill resource requests.

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

Specifying My Assignments Options

To specify My Assignments options, use the My Assignments Options component (RS_MYASSGN_OPT).

This topic discusses how to select resource charts and parameters.

Page Used to Specify My Assignments Options

Page Name	Definition Name	Usage
My Assignments Options Page	RS_MYASSGN_OPT	Select resource charts and parameters to appear in the My Assignments component for the user.

My Assignments Options Page

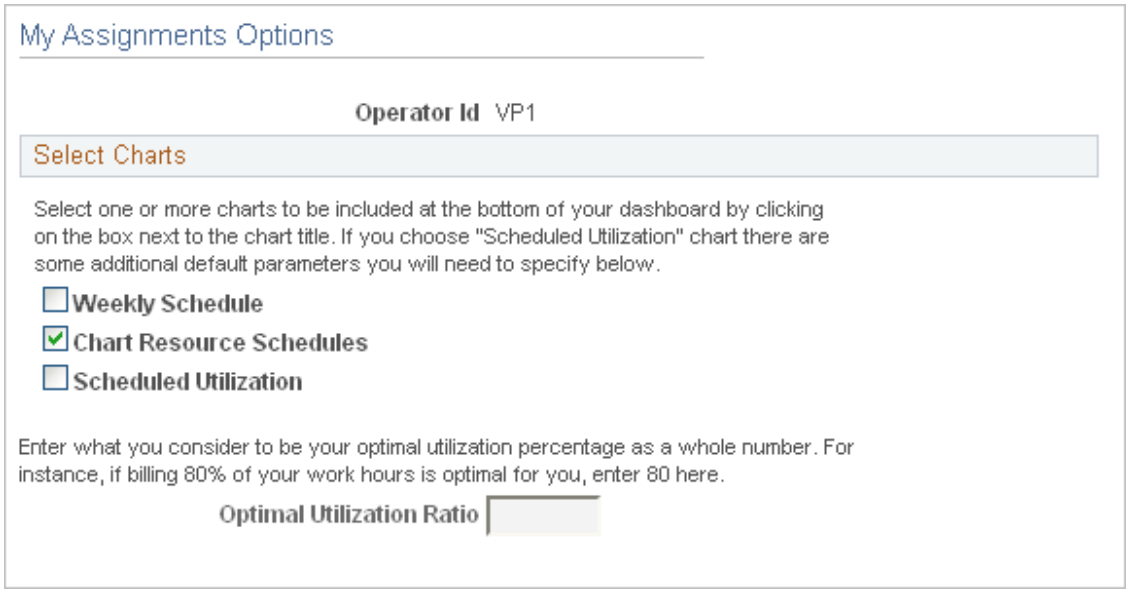
Use the My Assignments Options page (RS_MYASSGN_OPT) to select resource charts and parameters to appear in the My Assignments component for the user.

Navigation:

- **Resource Management**, and then **Define User Options**, and then **My Assignments Options**, and then **My Assignments Options**
- **Set Up Financials/Supply Chain**, and then **Product Related**, and then **Resource Management**, and then **Setup My Assignment Options**

This example illustrates the fields and controls on the My Assignments Options page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Operator Id	Displays the user ID of the resource who is logged into this session.
Weekly Schedule	Select to display your weekly schedule on the My Assignments - Assignments page.
Chart Resource Schedules	Select to display a Gantt chart of your four-week schedule on the My Assignments - Assignments page.
Scheduled Utilization	Select to display a chart of your personal four-week scheduled utilization on the My Assignments - Assignments page. If you select this option, you must enter a value in the **Optimal Utilization Ratio** field.
Optimal Utilization Ratio	Enter the percentage of capacity required for you to be treated as optimally utilized on the Scheduled Utilization chart. Enter a whole number. For example, *80* indicates that you must be at least 80 percent utilized for the system to treat you as optimally utilized. This field is required if you select the Scheduled Utilization chart to appear on the My Assignments - Assignments page.

Working with Assignments

The My Assignments page opens to a list of existing assignments. You can drill down to view current or previous assignment details in the **Current** and **History** views. By clicking the **Bids** and **Recommendations** links, you can view summary information or details of resource requests for which you placed a bid or received a recommendation. You can also initiate an email message to your manager from these views. The chart-viewing options that you define on the My Assignments Options page appear at the bottom of the page.

You can drill down to view current or previous assignment details using the **Current** and **History** links. You can view summary information or details of resource requests for which you

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have bid or been recommended by clicking the **Bids** and **Recommendations** links. When you click a link, the rows that do not meet the filter criteria are hidden. The number of assignments or resource requests that are included in a filter appears in parentheses next to the filter name.

Pages Used to Work with Assignments

Page Name	Definition Name	Usage
Assignments Page	RS_MYASSIGNMENTS	Review your existing assignments and send comments to your manager.
Assign Resource Page	RS_ASSIGN_UPDDTS RS_ASSIGN_MAIN	Review and modify information about an assignment, based on the security access of your user role. Resources have access to only their assignments.
Job Detail Page	RS_WRKR_JOBINFO	Review information about the service order and resource request.
Job Scorecard for <Resource> Page	RS_JOB_SCRD_SEC	View resources' fit scores against the requirements that you specify in a search or on a resource request.
Send E-mail to <Manager> Page	RS_EMAILTEXT_SEC	Send your manager comments about the associated assignment.

Assignments Page

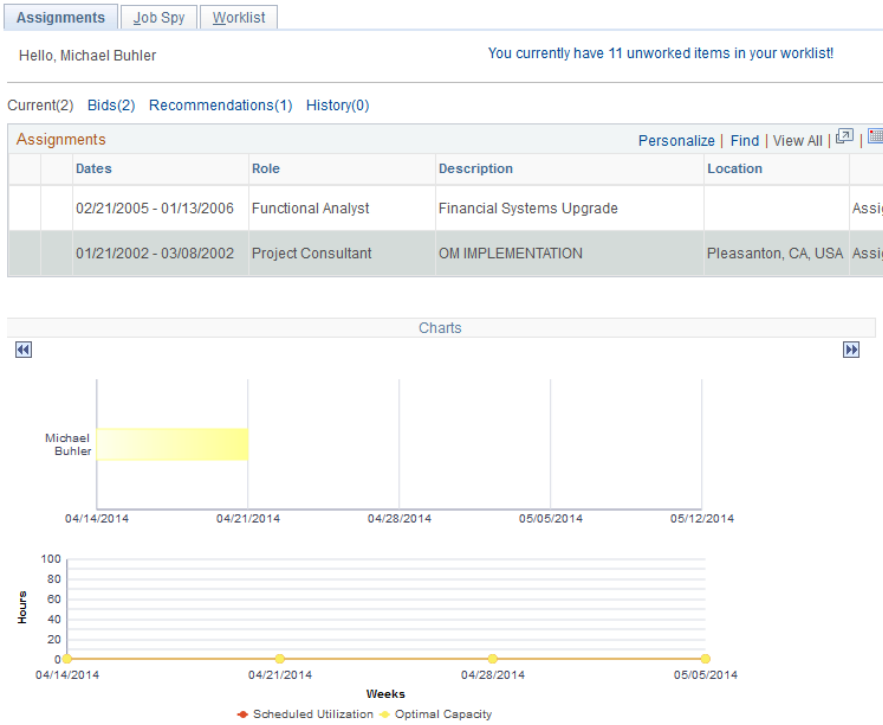
Use the Assignments page (RS_MYASSIGNMENTS) to review your existing assignments and send comments to your manager.

Navigation:

Resource Management, and then **My Assignments**, and then **Assignments**

This example illustrates the fields and controls on the Current view on the My Assignments - Assignments page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Hello , <user name>	Displays the user name associated with the user ID.
You currently have <number of items> unworked items in your worklist!	Click to view or process items that are routed to you from workflow. The My Assignments - Worklist page is discussed later in this topic.
Current	Click this link to view a list of your assignments with the following statuses: • *Proposed* • *Interviewing* • *Pending Approval* • *Assigned* You do not have to be currently working on the assignment for it to appear in this filter.
Bids	Click this link to view a list of resource requests for which you submitted a bid. A visual indicator appears in this filter if the resource request that you placed a bid for was assigned to another resource. Bids are removed from this filter once an assignment is created for the resource-and-resource request combination.
Recommendations	Click this link to view a list of resource requests for which you received a recommendation. A visual indicator appears in this filter if the resource request for which you were recommended was assigned to another resource. Recommendations are removed from this filter once an assignment is created for the resource-and-resource-request combination.

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Field or Control	Description
History	Click this link to view a list of your assignments that have the following statuses: • *Completed* • *Canceled* • *Rejected*

Assignments

Rows in the **Assignments** group box provide the following summary information about assignments (in the **Current** or **History** view), about resource requests for which you have placed a bid (in the **Bids** view), or about resource requests for which you have been recommended (in the **Recommendations** view).

Field or Control	Description
	Indicates that a worklist item on the My Assignments - Worklist page awaits your attention. The worklist item visual indicator may appear in the **Current, Recommendations,** or **History** view. Click this icon to view the Worklist page.
	Indicates a current assignment for the resource based on the assignment start and end dates. A current assignment is an assignment with a start date equal to or before the current system date and an end date equal to or after the current system date. This visual indicator may appear in the **Current** or **History** view.
	Indicates that another resource was selected to fulfill a resource request for which you submitted a bid or received a recommendation. This visual indicator appears only in the **Bids** or **Recommendations** view.
	This visual indicator may appear in the **Recommendations** or **History** view. In the **Recommendations** view, it indicates that the resource request is canceled. In the **History** view, it indicates that the assignment is canceled.
Dates	Displays the earliest start and latest end date of the date ranges on the assignment.
Role	Displays the role that the resource is fulfilling on the assignment.
Description	Displays the assignment description.
Location	Displays the assignment location.
Status	The information contained in this column changes based on the active view. In the **Current** or **History** view, the column displays your assignment status. In the **Bids** or **Recommendations** view, the column displays the status of your bid or recommendation.

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Field or Control	Description
Detail	The destination of this link changes based on the view. In the **Current** or **History** view, click **Detail** to access the Assign Resource page, where you can review assignment details. You can modify the assignment or change assignment dates based on the permissions associated with your user role. Click **Cancel** on the Assign Resource page to return to the workbench without modifying the assignment. See Assign Resource Page. In the **Bids** or **Recommendations** view, click **Detail** to access the Job Detail page to review information about the service order and resource request. Click **Return to My Assignments** to return to the workbench. See Staffing Workbench - Fulfill Orders Page.
	Click to access your job scorecard and view the detailed evaluation of your qualifications, availability, and preferences compared to the resource request. The job scorecard icon is available if: • The assignment is associated with a service order, and the assignment start date is earlier than the current date. • There is no assignment associated with the service order, such as in the Bids filter and Recommendations filter. On the job scorecard, click **Return** to return to the workbench. See Job Scorecard for <Resource> Page.
	Click to access the Send E-Mail to <Manager> page and send a message to your manager regarding the assignment. On the Send E-Mail to <Manager> page, click **OK** or **Cancel** to return to the workbench.

For each assignment row, you can view visual indicators and summary information about an assignment or resource request. Each assignment or resource request row displays one of the following visual indicators:

Charts

PeopleSoft Resource Management provides charts that you can view in the workbench in real time. You can select workbench options to display the Weekly Schedule, Resource Schedule, and Scheduled Utilization charts below the **Assignments** scroll area.

- In the Weekly Schedule chart, you can:
  - Click the right or left arrow to scroll to the next or previous week.
  - Click the link for an assignment description to access the Assign Resource page, where you can review assignment details.
  - Modify the assignment or change assignment dates, depending on the permissions associated with your user role.

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- Click the link for an appointment description to access the Appointment Details page and modify as required.
- If there are no schedule entries for a day, click the date link to access the Appointment Details page and create a new appointment.
- If there are schedule entries for a day, click the date link to access the Daily Schedule page.

> **Note**
>
> Your schedule appears for the current week.

- In the Resource Schedule chart, you can:
  - View your unavailable time (gray bar), available time (white area), or overbooked time (red bar) for that period.
  - View the assignment and customer description, or appointment description, when your cursor hovers over a task on the chart.
  - Click the double-right or double-left arrows to scroll to the next or previous four-week period.

    If you also display the Scheduled Utilization chart, the double arrows scroll both charts so they display the same four-week period.

> **Note**
>
> The Resource Schedule chart displays your schedule for a four-week period beginning with the current date. Task categories and corresponding chart colors are specified during implementation on the Installation Options - Resource Management page.

- In the Scheduled Utilization chart, you can:
  - Click the double-right or double-left arrows to scroll to the next or previous four-week period.
  - Compare your scheduled utilization (red line) against your optimal utilization ratio (yellow line).
  - View the calculated utilization for a period by moving the mouse pointer across a scheduled utilization node on the chart.

> **Note**
>
> The task categories that the system takes into account are specified during implementation. You specify them on the Installation Options - Resource Management page. The Scheduled Utilization chart represents your scheduled utilization—the amount of time that you are scheduled to spend working on assignments—compared with the optimal capacity threshold that you specified on the My Assignments Options page.

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Assign Resource Page

Use the Assign Resource page (RS_ASSIGN_UPDDTS) to review and modify information about an assignment, based on the security access of your user role.

Navigation:

- Click **Detail** on an assignment row in the **Current** or **History** view on the My Assignments - Assignments page.
- **Resource Management**, and then **Assign Resource**, and then **Assign Resource**

On this page, you can view details about the assignment and modify the assignment schedule, based on the security access of your user role.

Click **Cancel** to return to the workbench without modifying the assignment.

Job Detail Page

Use the Job Detail page (RS_WRKR_JOBINFO) to review information about the service order and resource request.

Navigation:

- Click **Detail** on an assignment row in the Bids or Recommendations view on the My Assignments - Assignments page.
- Click **Detail** on a resource request row on the My Assignments - Job Spy page.

On this page, you can view details about the service order, as well as resource request details such as requirement dates, competencies, accomplishments, qualifications, preferences, and the specified importance of each to the project role.

Click **Return to My Assignments** to return to the workbench.

Send E-mail to <Manager> Page

Use the Send E-mail to <Manager> page (RS_EMAILTEXT_SEC) to send your manager comments about the associated assignment.

Navigation:

Click the **E-mail Supervisor** button on an assignment row.

> **Note**
>
> Your manager appears as the addressee on the page. A supervisor must be defined for a resource on the Update Employee Data - Employee Job page before the resource can send email notifications to a manager.

Enter comments about an assignment or resource request. The message includes other pertinent information about the assignment, such as the customer, description, start and end dates, project role, business unit, service order and resource request ID, or work assignment ID.

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Field or Control	Description
OK	Click to send the message and return to the My Assignments - Assignments page.
Cancel	Click to return to the My Assignments - Assignments page without sending or saving the message.

Working with the Job Spy Feature

This topic discusses how to work with the Job Spy feature.

Pages Used to Work with the Job Spy Feature

Page Name	Definition Name	Usage
Job Spy Page	RS_MYJOBSPY	Find assignments based on selected search options and Resource Matching fit scores.
Job Scorecard for <Resource> Page	RS_JOB_SCRD_SEC	View your fit scores against the specific requirements for this assignment.
Job Detail Page	RS_WRKR_JOBINFO	Review information about the service order and resource request.
Bid Confirmation Page	RS_WRKR_BID_SUBMIT	Submit a bid for a specific service order.
Send E-mail to <Manager> Page	RS_EMAILTEXT_SEC	Send your manager comments about a specific resource request.

Job Spy Page

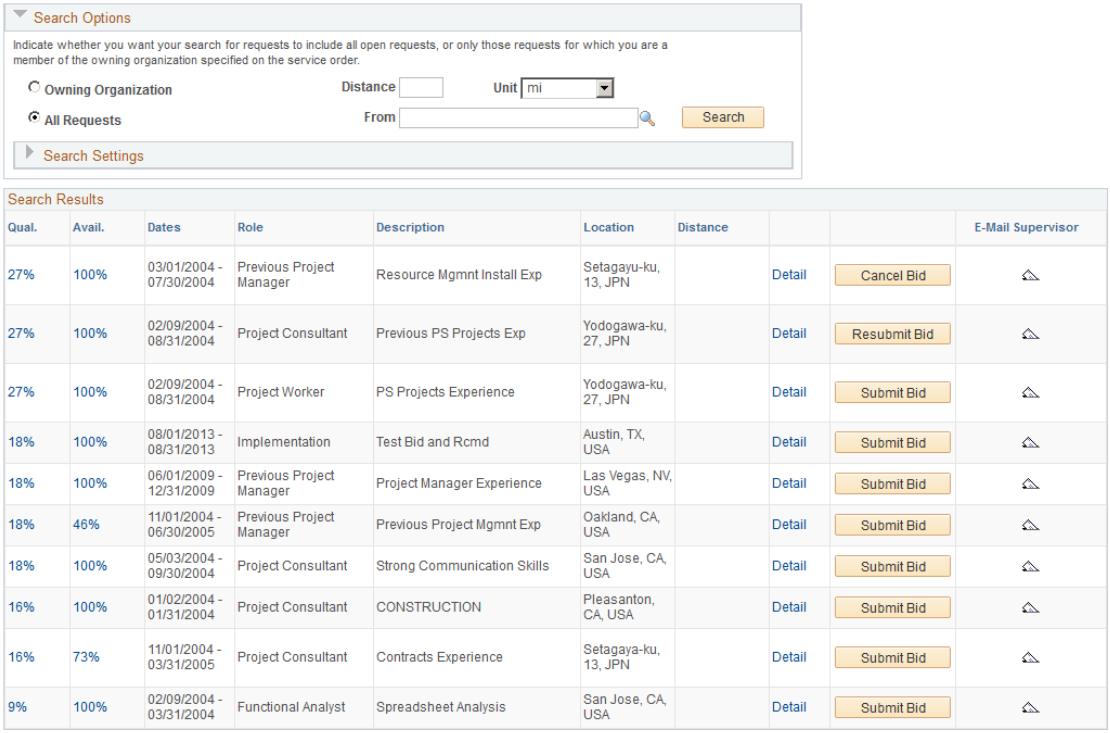
Use the Job Spy page (RS_MYJOBSPY) to find assignments based on selected search options and Resource Matching fit scores.

Navigation:

Resource Management, and then **My Assignments**, and then **Job Spy**

This example illustrates the fields and controls on the Search options on the Job Spy page. You can find definitions for the fields and controls later on this page.

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You populate the page with open resource requests that are appropriate for you based on your search options and factor fit scores for each open request.

Search Options

Search options control which resource requests the Resource Match engine evaluates when it searches for assignments for you. You can search all requests, or only the requests that are available to your organization. You can also assign relative priorities to each factor family fit score. The priorities determine which requests are returned and the order in which they appear in the work space.

The order of the resources requests in the grid is based on the overall fit score that consists of:

- How well you fit the specified qualifications, availability, and preferences.
- The organization's individual factor priorities that are specified on the Search Configuration - Factor Weights page.
- The relative priorities that you specify during the search session.

The overall fit score calculation begins with the objective fit scores for each match factor. The system then calculates factor family fit scores by applying installation-level relative factor importance settings. Then the system averages the family scores according to the relative factor family preferences that are selected during each instance of the Resource Match engine.

The resulting overall fit score does not appear on the page, but it controls which resource requests appear in the search results. The resource requests appear in descending order of overall fit score.

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Field or Control	Description
Owning Organization	Select this radio button to have the Resource Matching feature evaluate only open resource requests with a service order owning organization that includes your organization. For example, if the organizational unit is *Department,* Resource Matching evaluates any open resource request that specifies your department or a parent department as the owning organization on the service order.
All Requests	Select this radio button to have the Resource Matching feature evaluate all open resource requests as potential matches for you.
Search	Click this button to initiate the Resource Match engine and calculate fit scores based on your search options. You can adjust your search options and click **Search** to refresh the work space as many times as needed.
Availability, Preferences, and **Qualifications**	Expand the **Search Settings** collapsible group box and assign the relative priorities to each of the factor family fit scores for this search session. **Note:** At least one of the factor families must have an importance value of at least *1 - Much less important* for the Resource Matching feature to return the appropriate search results.
Max Assignments (maximum assignments)	Enter the maximum number of requests to return.
Qual. (qualifications), **Prefs.** (preferences), and **Avail.** (availability)	Displays the factor family fit scores that indicate how closely the resource request matches your profile, interests, and schedule. Click any fit score link to access the job scorecard and view details about requirements that are included in your fit score calculation for each factor family. See Job Scorecard for <Resource> Page.
Dates	Displays the start and end date of the resource request. If multiple date ranges are specified on the request, the first start date and last end date appear.
Role	Displays the project role to be filled on the resource request.
Description	Displays the resource request description.
Location	Displays the assignment location that is specified on the resource request.
Detail	Click this link to access the Job Detail page and review available information about the resource request and service order.

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Field or Control	Description
Submit Bid/Cancel Bid/Resubmit Bid	Use this button to submit, cancel or resubmit a bid. Depending upon the action you perform, this button displays the following labels • **Submit Bid** — Submit a bid for a resource request. This label displays only if you are submitting a bid for the first time for this resource request. • **Cancel Bid** — Cancel a bid for a resource request. The button displays this label only if you have previously submitted a bid for this resource request. • **Resubmit Bid** — Resubmit a bid for a resource request. The button displays this label if you have previously canceled a bid for this resource request.

Bid Confirmation Page

Use the Bid Confirmation page (RS_WRKR_BID_SUBMIT) to submit a bid for a specific service order.

Navigation:

Click **Submit Bid** on the My Assignments - Job Spy page.

You can submit a bid for any resource request in the Search Results grid on the My Assignments - Job Spy page.

Field or Control	Description
Yes	Verify the resource request information on the confirmation page and click **Yes** to enter the bid and return to the My Assignments - Job Spy page.
No	Click to return to the My Assignments - Job Spy page without entering a bid.

Evaluating Search Results

With the functionality and convenience of a one-stop workbench, the Job Spy provides easy access to the tools that you need to proactively search for work and make your interests known to managers and members of the staffing team. You can:

- Search for work throughout the organization or only in your department (or other organizational unit).
- Evaluate your qualifications, preferences, and availability using the job scorecard.

  The job scorecard contains the request dates and other requirements that determine your fit score calculation for the resource request.
- View all of the available information about the resource request on the Job Detail page.
- Express interest in a specific resource request by submitting a bid, or contact your manager about an assignment, resource request, bid, or recommendation.

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Related Topics

- Evaluating Resource Requests
  Resource requests that meet the search criteria for a resource appear under the resource summary row.

Managing a Worklist

This topic discusses how to manage worklist items.

Page Used to Manage a Worklist

Page Name	Definition Name	Usage
Worklist Page	RS_MYWORKLIST	Review and process worklist items that are assigned to you.

Worklist Page

Use the Worklist page (RS_MYWORKLIST) to review and process worklist items that are assigned to you.

Navigation:

- Click **You currently have <number of items> unworked items in your worklist** on the My Assignments - Assignments page.
- Click **You currently have <number of items> unworked items in your worklist** on the My Assignments - Job Spy page.
- Resource Management, My Assignments, Worklist

A link to your worklist appears at the top of the workbench to alert you to any outstanding workflow items that require your attention. From the worklist, you can access item details, complete the required actions, and mark the items complete.

Use the Worklist page to view and manage worklist items such as:

- Notification of changes to your assignment status.
- Notification of changes to your assignment dates.
- Notification of requests for which you have been recommended.

A variety of worklist items may appear, including items that originate from sources other than PeopleSoft Resource Management. The actions that generate workflow actions or notification messages are specified during PeopleSoft Resource Management implementation.

> **Note**
>
> PeopleTools also provides a worklist that you can access from the folder navigation or from the Worklist link in the PeopleSoft universal navigation header. The worklist items are the same on any Worklist page, and you can view and process items from any worklist.

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Related Topics

- Understanding the Worklist
  A worklist is an organized list of the work items that need to be addressed. PeopleSoft Resource Management workbenches—the Staffing Workbench, Pool Manager Workbench, and My Assignments component—contain a Worklist page that displays notifications and actions that are added to the page from PeopleSoft workflow processes. A link to the worklist appears at the top of the workbench to alert you to outstanding items. From the worklist, you can access item details, complete the required actions, and mark items complete.

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Conducting Capacity Planning

Understanding Capacity Planning

This section discusses:

- Capacity planning in PeopleSoft Resource Management.
- Terminology that is relevant to capacity planning.
- Capacity planning high-level process steps.

Capacity Planning in PeopleSoft Resource Management

Capacity Planning enables the Executive and IT management teams to commit to the highest priority projects and other demands with confidence, knowing that sufficient resource capacity exists within the organization. Capacity planning provides management with the:

- Ability to create and join a supply and demand forecast that highlights future resource gaps and surplus.
- Ability to create resource plans to resolve future resource imbalances.

Capacity Planning is an integral piece of functionality for the Project Portfolio Management and Information Technology (IT) governance markets. It is the merger and balance of human resources (supply) and work to be done (demand) to achieve and sustain peak operational efficiency.

PeopleSoft Resource Management provides IT and development organizations with capacity planning functionality to empower managers who make important demand commitment decisions based upon limited resources or capacity information. Capacity planning is primarily concerned with long-term projections and decisions about your organization's resource demand and supply.

After IT and development organizations have made important demand commitment decisions based upon their strategic capacity planning, pool managers, resource managers, and program managers need to execute upon those commitments. At an operational or day-to-day level, difficult resource decisions must be made over the course of a project to be successful. Some operational challenges—such as high resource turnover rates, extended vacations or illness on the part of key resources—cannot be forecast with Capacity Planning.

By logically grouping resources together, resource pools enable efficient resource management, while supply categories allow for classification of resources more interchangeably. Generic resource allocation enables managers to reserve pool capacity, and supply category analytics improve visibility of resource capacity.

Terminology

This table describes terms that are relevant to capacity planning:

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Term	Description
Supply Forecast	A supply forecast is an aggregated projection of all labor resource capacity based on resource pool headcount forecasts and capacity.
Demand Forecast	A demand forecast is an aggregated projection of all labor resource demand from projects and external data sources.
Commitment Line	A commitment line is the point at which a prioritized list of demand is separated into committed versus deferred.
Capacity Planning Consolidated Scenario	A complete capacity planning scenario consists of a version of the supply forecast, a version of the demand forecast, a commitment line and list of assumptions.
Supply Categories	Supply categories are specific resource attributes that are commonly used for capacity planning, availability and reporting purposes. The supply categories are project role, region, resource pool, and personnel status.
Resource Pools	Resource pool setup is an integral part of capacity planning, and is based on how your company wants to organize your resources based on such factors as location, job function, team, application, and so on. A resource pool is a collection of resources that are distinctly different from a project team or human resources (HR) department that is used for management and planning purposes. An administrator or pool manager defines the resource pools in the system, and assigns a manager for each pool. A pool manager can then add, update, or remove resources from pools.
Project Manager	A project manager is responsible for the planning, estimating, resourcing, and execution of a project.
HR Manager	An HR manager is responsible for the budgeting, supervision, and performance review of a group of resources that is typically assigned to a department or cost center.
Resource Pool Manager	A resource pool manager is responsible for the management and capacity planning of a group of resources.

Capacity Planning High-Level Process Steps

The capacity planning process can be described with these steps:

1. Executives organize resources into meaningful resource pools and set resource utilization percentages at the regional level.
2. Pool managers forecast capacity percentages for each resource role in their pool and account for future capacity.

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3. The program manager creates the initial supply forecast model showing total capacity for each resource pool by using the capacity percentages combined with the preset region-based utilization percentages.
4. Once a supply forecast is created, executives can adjust capacity and regional utilization percentages to create different supply forecasts from the original model to analyze alternate scenarios.
5. The program manager creates the initial demand forecast, which is combined with supply forecasts to create consolidated scenarios for what-if analysis.

   The flexibility of this conditional analysis helps management determine the optimal balance of available resources and pending work for the projected time period.

The project manager can add generic resources with supply categories to the project resource list and requests assignments. The project manager creates a generic resource request, and has the option to automatically request generic and named resources during Microsoft Project (MSP) integration. The pool managers can view supply category capacity, allocation and availability by week, at the pool and role level. The project manager can view individual resource availability based on project assignments and activity assignments. After pool managers have viewed the supply category analytic information, they can transfer resources from one pool to another pool, or do a mass transfer of assignments from one resource to another resource. The pool managers can then update generic allocations to named resource assignments.

Prerequisites

To implement capacity planning, you must

- Install PeopleSoft Project Costing, Program Management, and Resource Management.
- Install PeopleSoft Expenses for time reporting and policy time functionality so that historical policy time submitted for the preceding year is accessible for the region utilization percentage.

Setting Up Capacity Planning

This topic provides an overview of resource utilization percentages and discusses how to set up Capacity Planning.

Pages Used to Set Up Capacity Planning

Page Name	Definition Name	Usage
Region Codes	REGION_CD	Set up region codes for the *Resource Management* region category ID. If you do not want to use regions, set up an Unassigned region for each SetID and use that value when defining the **Region** supply category for a resource.
Region Type Codes	REGION_TYPE	Set up region types.

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Page Name	Definition Name	Usage
Link Regions to Business Units Page	RS_REGION_BUEX	Select the PeopleSoft Expenses business units to map to each region. The system calculates the historical utilization percentage of resources per region. A PeopleSoft Expenses business unit can belong to only one region. All PeopleSoft Expenses business units within a region must have the same SetID.
Define Utilization Percentages Page	RS_REGION_UTIL	Define utilization percentages for each region's policy time reporting codes. The system initially calculates the utilization percentage based on the time logged by resources in that region to the policy time codes over the course of the previous year and display it on this page. You can use that calculated utilization percentage as a reference point in setting the actual region utilization percentage that will be used in capacity planning.
Installation Options - Resource Management Page	INSTALLATION_RS	Select the default unit of measure display and conversion for resource work in the **Capacity Planning Setup** group box. Specify the default capacity planning region. The system uses this region as the default value when you add effort to a demand forecast or combined scenario analysis.
Common Installation Options page - Resource Setup	INSTALLATION_RESRC	Verify that the scheduling options are set up appropriately for the default work days and standard hours per day.
Strategic Capacity Planning Home Page	RS_SCP_HOMEPAGE	Provides a centralized location for strategic capacity planning activities, and lists the last five supply, demand, and consolidated scenario analysis forecasts that the user accessed.

Understanding Resource Utilization Percentages

Before you can create a supply forecast you must set up resource utilization percentages. The system enables you to view the historical utilization percentage of the resources and to set a new percentage to create a supply forecast model.

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Setting up utilization percentages consists of defining regions, associating time reporting business units and time reporting codes to regions, and setting a utilization percentage default per region.

> **Note**
>
> Region is a supply category.

The Link Regions to Business Units component (RS_REGION_BUEX)includes the mapping of PeopleSoft Expenses business units and SetIDs to the region code. The Define Utilization Percentages component (RS_REGION_UTIL) includes a breakdown of historical and default utilization percentages based on the SetID's time reporting codes (TRCs) for that region. The component searches the preceding year's reported timesheets to gather the historical information.

> **Note**
>
> The historical utilization percentage is an approximation and is mainly used to create the supply forecast.

Link Regions to Business Units Page

Use the Link Regions to Business Units page (RS_REGION_BUEX) to select the PeopleSoft Expenses business units to map to each region.

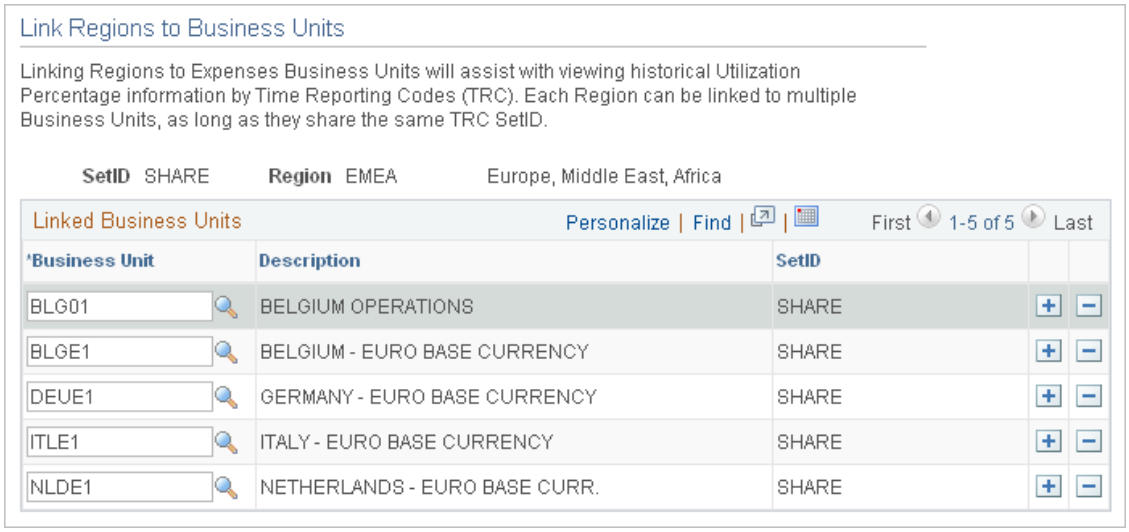
The system calculates the historical utilization percentage of resources per region. A PeopleSoft Expenses business unit can belong to only one region. All PeopleSoft Expenses business units within a region must have the same SetID.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Resource Management**, and then **Utilization Percentage**, and then **RM Link Region BU Utilization**

This example illustrates the fields and controls on the Link Regions to Business Units page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Business Unit	Select from a list of PeopleSoft Expenses business units that are not yet associated with a region. **Note:** Business units that are already associated to a region do not appear in the list.

> **Note**
>
> Region is a required supply category for all PeopleSoft Resource Management resources.

Define Utilization Percentages Page

Use the Define Utilization Percentages page (RS_REGION_UTIL) to define utilization percentages for each region's policy time reporting codes.

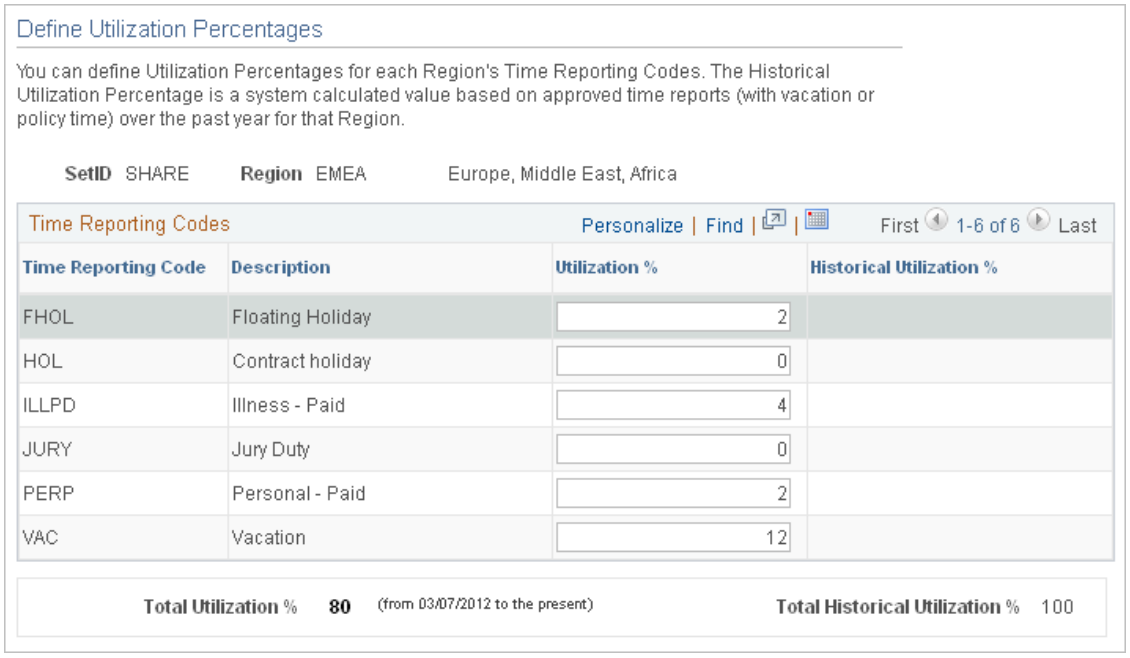
The system initially calculates the utilization percentage based on the time logged by resources in that region to the policy time codes over the course of the previous year and display it on this page. You can use that calculated utilization percentage as a reference point in setting the actual region utilization percentage that will be used in capacity planning.

Navigation:

Set Up Financials/Supply Chain, and then **Product Related**, and then **Resource Management**, and then **Utilization Percentage**, and then **Setup RM Utilization Percent**

This example illustrates the fields and controls on the Define Utilization Percentages page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Time Reporting Code	Displays the time reporting codes (TRCs) for each region. The system obtains the policy time codes using the business units that are linked to that region on the Region Codes page.

Field or Control	Description
Utilization % (utilization percentage)	The utilization percentage that appears as the default value is the historical utilization percentage. You can override the default value. **Note:** If you change the **Utilization %** after a forecast is saved, the forecast will not be affected.
Historical Utilization % (historical utilization percentage)	Displays the percentage of total time reported by the resources in the region for each TRC for the previous year in PeopleSoft Expenses.
Total Utilization % (total utilization percentage)	Displays the final utilization that is used within strategic capacity planning models, which is calculated by subtracting all **Utilization %** rows from 100 percent.
Total Historical Utilization % (total historical utilization percentage)	Displays the final historical utilization, which is calculated by subtracting all **Historical Utilization %** rows from 100 percent. Historical utilization assists management with determining the proper utilization value to set.

Installation Options - Resource Management Page

Use the Installation Options - Resource Management page (INSTALLATION_RS) to select the default unit of measure display and conversion for resource work in the Capacity Planning Setup group box.

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Specify the default capacity planning region. The system uses this region as the default value when you add effort to a demand forecast or combined scenario analysis.

Navigation:

Set Up Financials/Supply Chain, and then **Install**, and then **Installation Options**, and then **Resource Management**

See Application Fundamentals: Defining Resource Management Installation Options.

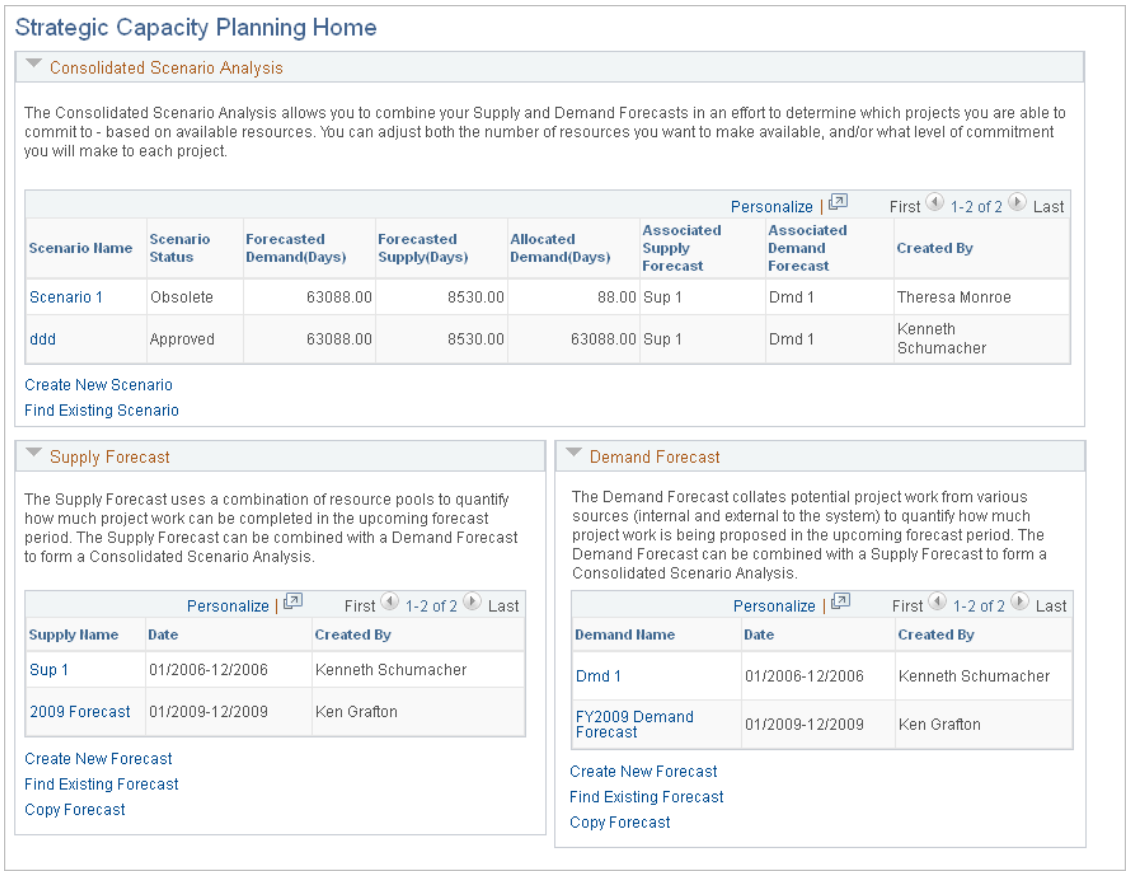
Strategic Capacity Planning Home Page

Use the Strategic Capacity Planning Home page (RS_SCP_HOMEPAGE) to provides a centralized location for strategic capacity planning activities, and lists the last five supply, demand, and consolidated scenario analysis forecasts that the user accessed.

Navigation:

- **Resource Management**, and then **Strategic Capacity Planning**, and then **Strategic Capacity Home**, and then **Strategic Capacity Planning Home**
- Click a **Capacity Planning Home** link from any page in the component.

This example illustrates the fields and controls on the Strategic Capacity Planning Home page. You can find definitions for the fields and controls later on this page.



Consolidated Scenario Analysis

Click a link in the **Scenario Name** column to view details of that scenario.

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Field or Control	Description
Create New Scenario	Click this link to create a new consolidated scenario.
Find Existing Scenario	Click this link to view a particular consolidated scenario.

Supply Forecast

Click a link in the **Supply Name** column to view details of that supply forecast.

Field or Control	Description
Create New Forecast	Click this link to create a new supply forecast.
Find Existing Forecast	Click this link to view a particular supply forecast.
Copy Forecast	Click this link to copy a particular supply forecast.

Demand Forecast

Click a link in the **Demand Name** column to view details of that demand forecast.

Field or Control	Description
Create New Forecast	Click this link to create a new demand forecast.
Find Existing Forecast	Click this link to view a particular demand forecast.
Copy Forecast	Click this link to copy a particular demand forecast.

Creating Supply Forecast Models

This topic provides overviews of the supply forecast model and resources and capacity calculations, and discusses how to create Supply Forecast models.

Pages Used to Create and Modify Supply Forecasts

Page Name	Definition Name	Usage
Supply Forecast - Select Pools Page	RS_FR_SUP_SEL_POOL	Add a new supply forecast and select the pools to add to the supply forecast.
Search for Pools Page	RS_FR_POOL_SRCH	Search for pools by pool name, pool manager, or pool ID to be added to the supply forecast.

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Page Name	Definition Name	Usage
Supply Forecast Page	RS_FR_SUP_SUMMARY	View the summarized information for a supply forecast. The page contains links to all the other supply forecast functions. After you select the pools that you want to include in the supply forecast, you can view the calculated capacity for all the resources (generic and named resources) that are in the selected resource pools. The data is summarized first by pool and then by role.
Supply Forecast Detail Page	RS_FR_SUP_DTL	View the supply details for all of the pools or one particular pool in the supply forecast.
Modify Supply in Forecast Page	RS_FR_SUP_MOD_SUP	Add or subtract the actual supply in the forecast to, for example, model different scenarios for a given calculated resource pool role row.
Add New Supply To Forecast Page	RS_FR_SUP_ADD_SUP	Add additional supply to a forecast. The system validates the dates you enter to ensure that the start date is not greater than the end date and that the date range does not exceed 24 months. When adding a new value, you can manually enter the supply forecast ID or the system can generate it.
Modify Region Utilization Page	RS_FR_SUP_UTIL	Change the utilization percentage for a forecast.
Supply Forecast Modification History Page	RS_FR_SUP_MOD	View details of modifications made to supply forecasts.
Supply Analysis Page	RS_SUP_ACE_PAGE	Analyze supply forecast data by supply categories and months.
View Supply Forecast Charts Page	RS_SUP_CHARTS	View graphical summarized capacity information by supply category.
Copy Forecast Page	RS_FR_COPY	Create copies of existing forecasts with same date range as the original forecast. Use this page to copy supply or demand.

Understanding the Supply Forecast Model

Supply consists of human resources that are available to do work. A supply forecast is an aggregated projection of all labor resource capacity based on resource pool headcount

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forecasts and utilization. A supply forecast model provides an organization with a way to gain an accurate, concise picture of its forecasted resource capacity over a period of time.

After resources are grouped in resource pools, pool managers can define a capacity percent for each resource (named or generic) in their pool and account for future capacity in those resource pools. This information is combined with the preset, region-based utilization percentage to create a supply forecast that calculates the total capacity for each resource pool. Three other supply categories (role, region, and personnel status) further segregate the data.

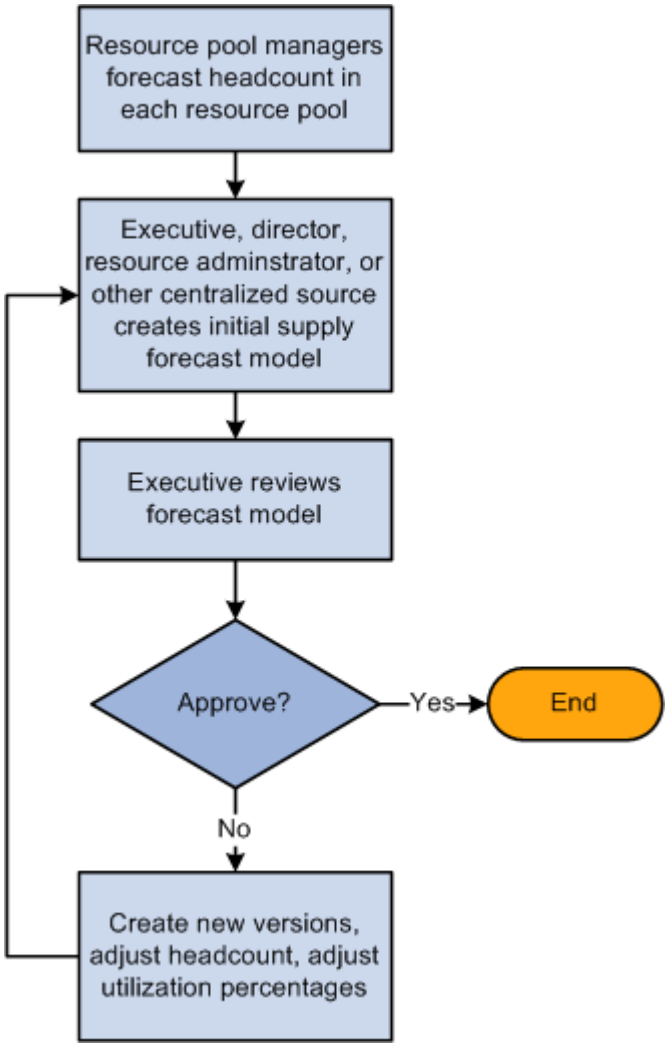
The system also calculates the capacity of each resource (named and generic) within each of the selected pools for the selected date range. The data is presented in a summarized format and initially displayed by pool and role (within each pool). You have the option to view the data by other supply categories as well as in graphical format. In addition, you can view the resource information using PeopleSoft Analytic Calculation Engine interactive analysis.

The maximum range for supply forecasting is 24 months.

> **Note**
>
> All data in supply forecasts, demand forecasts, and consolidated scenarios are point-in-time. This means that if additional resource pools or demand data change or become available on the transactional side, it does not affect any existing forecasts or scenarios—unless you specifically choose to add them afterwards. In other words, forecasts are created based on the picture of the supply and demand as of the date the forecast was created. If pools and capacity are added a week later, for example, that information does not appear in the supply forecast. You can manually add the supply or new resource pools to the forecast or create a new forecast to capture the latest supply data.

This flowchart shows the supply forecast model process:

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You use the Supply Forecast component (RS_FR_SUPPLY) to create, view, and modify supply forecasts.

Understanding Resources and Capacity Calculations

This section discusses:

- Resources without roles.
- Resource capacity calculations.

Resources Without Roles

Because role is not a required supply category for a resource, it is possible that the forecast will encounter resources that do not have a role specified. If the forecast encounters any resources with a blank **Role** field, the system displays the capacity for these resources with a label of *Undefined Role.* For example, this table lists the resources within Pool A:

Name	Role	Capacity
Michael Fontes	DBA	100 days

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Name	Role	Capacity
Serena Clemens	DBA	120 days
Kelly Orihood	QA	100 days
Justine Yee		50 days
Christopher Brown		75 days

The capacity breakdown is:

- DBA: 220 days
- QA: 100 days
- Undefined Role: 125 days

Resource Capacity Calculations

The system calculates capacity in either hours or days. Organizations decide at the installation level if they will display and calculate capacity in hours or days. Capacity is calculated by selecting each resource that is part of the selected pools for the time period that the forecast is being created. The system looks up the capacity percentage that was set in that pool for each resource. The capacity is multiplied by the number of days or hours in the forecast period. Finally, a utilization percentage (based on the resource's region) is applied. Therefore:

capacity = (resource pool capacity percentage) × (number of days or hours in period) × (utilization percentage)

The following scenarios explain how capacity is calculated. This table presents the information that is used in the subsequent scenarios:

Parameter	Value
Supply forecast period	June, 2004 - May, 2005 (12 months)
Display capacity in	Days (installation setting)
Number of hours in a day	8 (installation setting)
Number of days in a month	20 (installation setting)
One full-time resource	20 (Days per month = one full-time resource)
Utilization percentage for USA	85 percent

Scenario 1: Resource is in one pool with the same pool capacity percentage for the entire period.

Parameter	Value
Resource name	Generic
Role	DBA
Pool capacity percentage	100
Region	USA

(Pool capacity percentage) × (number of days or hours in period) × (utilization percentage).

1. 0 × (20 days × 12 months) × 0.85 = 204 days of capacity for the period.

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Scenario 2: Resource is in one pool with one pool capacity percentage for one full month, and another pool capacity percentage for the rest of the period.

Parameter	Value
Resource name	Alysha Kibble
Role	QA Lead
Pool capacity percentage	50 (6/1/04 - 6/30/04) 100 (7/1/04 - no end date)
Region	USA

(Pool capacity percentage) × (number of days or hours in period) × (utilization percentage).

06/01/04 – 06/30/04: 0.5 × (20 days x 1 month) × 0.85 = 8.5 days of capacity.

07/01/04 – 05/31/05: 1.0 × (20 days x 11 months) × 0.85 = 187 days of capacity.

Total capacity for the forecast period is 195.5 days.

Scenario 3: Resource is in one pool with one pool capacity percentage for a partial month, and another pool capacity percentage spanning multiple months.

Parameter	Value
Resource name	Corinne Brown
Role	Project Manager
Pool capacity percentage	50 (6/1/04 - 7/21/04) 100 (7/22/04 - no end date)
Region	USA

This scenario is one of the more complicated situations that may be present. The dates are broken down monthly (or by fractions of months when the capacity changes mid-month):

(Pool capacity percentage) × (number of days or hours in period) × (utilization percentage).

06/01/04 – 06/30/04: 0.5 × (20 days x 1 month) × 0.85 = 8.5 days of capacity.

07/01/04 – 07/21/04: 1.0 × (20 days x 0.68 month) × 0.85 = 5.8 days of capacity.

07/22/04 – 07/31/04: 1.0 × (20 days x 0.32 month) × 0.85 = 5.4 days of capacity.

08/01/04 – 05/31/05: 1.0 × (20 days x 10 months) × 0.85 = 170 days of capacity.

Total capacity for the forecast period is 189.7 days.

Supply full-time resource takes into account all the regions found in the supply forecast. For example, if the number of days is 6000, the region utilization percent is 80 (since each region can have a different percent each one would have to be included in the calculations), the days per month for a full-time resource is 20, and the number of months in the scenario date range is 12, the calculation is:

6000 days ÷ 0.80 ÷ 20 days ÷ 12 = 31.25 full-time resources.

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> **Note**
>
> Full-time resources are calculated differently between the Supply Summary page and the Supply Details page.

Supply Forecast - Select Pools Page

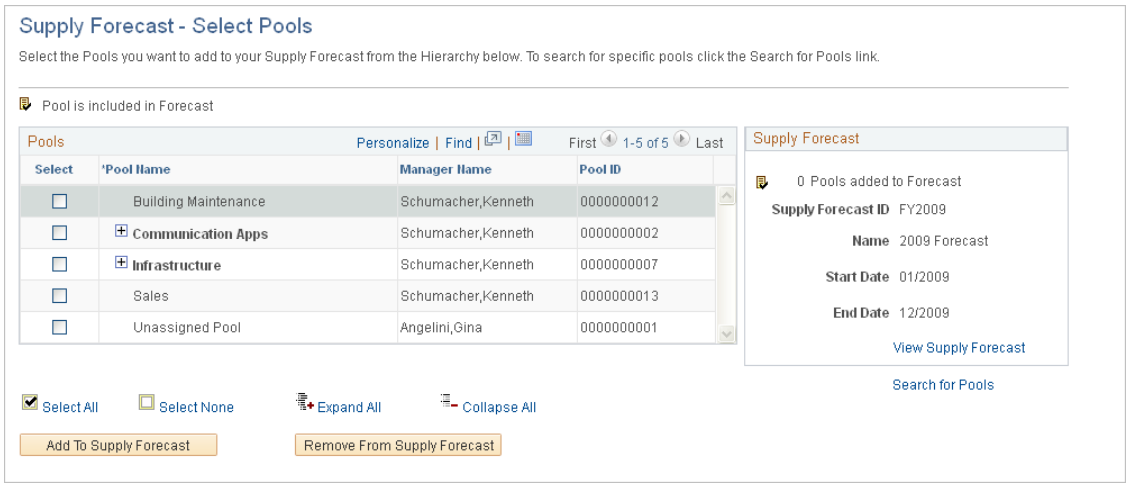
Use the Supply Forecast - Select Pools page (RS_FR_SUP_SEL_POOL) to add a new supply forecast and select the pools to add to the supply forecast.

Navigation:

Resource Management, and then **Strategic Capacity Planning**, and then **Capacity Plan Supply Forecast**

Click the **Continue Selecting Pools** link in an existing supply forecast.

This example illustrates the fields and controls on the Supply Forecast - Select Pools page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Select	Select this check box to designate that a pool is selected for the forecast. When you select a pool that has child pools, all the child pools should be selected as well. You can clear a parent pool without clearing the associated child pools.
Pool Name	Displays the description of the available pools from which to select.
Manager Name	Displays the name of the pool manager.
Add To Supply Forecast	Click this button to add the selected pools to the supply forecast.
Remove From Supply Forecast	Click this button to remove the selected pools from the supply forecast.

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Field or Control	Description
Search for Pools	Click this link to access the Search for Pools page where you can provide pool name, pool manager name, and pool ID criteria to limit the search and selection of specific pools.
View Supply Forecast	Click this link to view the summarized information for a supply forecast.
	The **Selected Pool** icon appears after you select a resource pool and click the **Add To Supply Forecast** button to add the pool to the supply forecast.

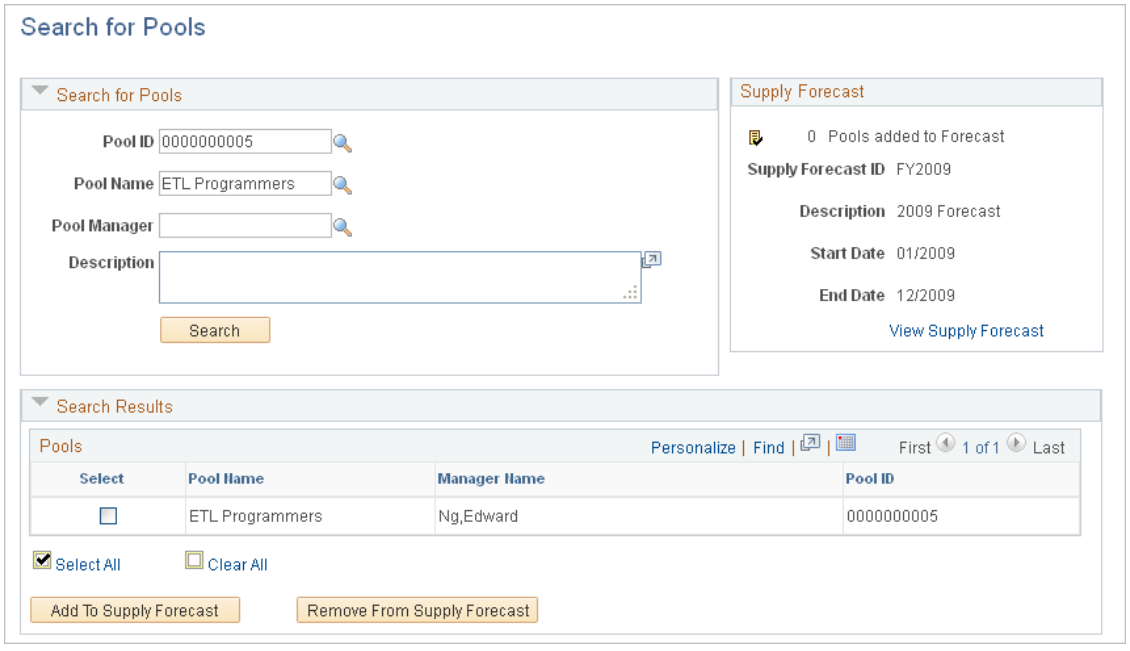
Search for Pools Page

Use the Search for Pools page (RS_FR_POOL_SRCH) to search for pools by pool name, pool manager, or pool ID to be added to the supply forecast.

Navigation:

Click the **Search for Pools** link on the Supply Forecast - Select Pools page.

This example illustrates the fields and controls on the Search for Pools page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Select	After you enter search criteria in the **Search for Pools** group box and view results in the **Search Results** group box, select the pools that you want to add to the forecast.

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Field or Control	Description
Add To Supply Forecast	Click this button to add the selected pools to the forecast. When you click this button, the **Selected Pool** icon appears next to the pool name. Click the **Return to Select Pools** link to return to the Supply Forecast - Select Pools page.

Supply Forecast Page

Use the Supply Forecast page (RS_FR_SUP_SUMMARY) to view the summarized information for a supply forecast.

The page contains links to all the other supply forecast functions. After you select the pools that you want to include in the supply forecast, you can view the calculated capacity for all the resources (generic and named resources) that are in the selected resource pools. The data is summarized first by pool and then by role.

Navigation:

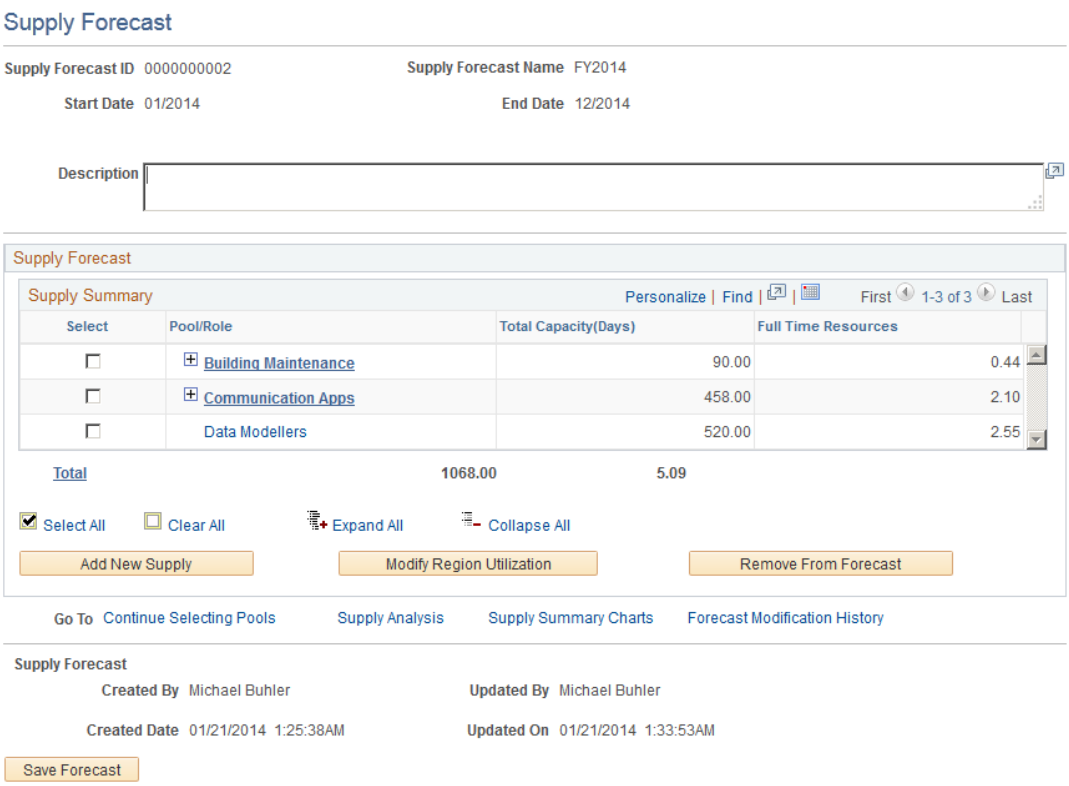
- **Resource Management**, and then **Strategic Capacity Planning**, and then **Supply Forecast**, and then **Supply Forecast**
- Click the **View Supply Forecast** link on the Supply Forecast - Select pools page.

This example illustrates the fields and controls on the Supply Forecast page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Supply Forecast page (2 of 2). You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Description	Enter a description for this supply forecast.
Pool/Role	Displays the pool name and associated roles for the pool. Click a pool link in this column to view all the calculated capacity in detail for that role within the specific pool. You can remove an entire pool from the supply forecast by selecting the adjacent check box and clicking the **Remove From Forecast** button.
Total Capacity(Hours) or **Total Capacity(Days)**	Based on your installation choice, this column displays the total calculated resource capacity in the pool for the date range specified for the supply forecast displays in hours or days. The data is summarized first by pool and then by role.
Full Time Resources	Displays the total number of full-time resources in the pool for the date range specified for the forecast. The common denominator for the calculation is the number of months included in the forecast.
Total	Displays the total capacity and full-time resources. Click this link to view supply details for all the pools in the supply forecast.
Add New Supply	Click to access the Add New Supply To Forecast page and select a date range within the forecast periods, pool, role, personnel status, region, and amount of capacity that you want to add to the supply forecast capacity.

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Field or Control	Description
Modify Region Utilization	Click to access the Modify Region Utilization page and adjust the region utilization percentage for the current supply forecast.
Remove From Forecast	Click to remove selected pool data from the forecast.
Continue Selecting Pools	Click to access the Supply Forecast - Select Pools page and refine the pool selection for this forecast.
Supply Analysis	Click to access the Supply Analysis page to view and analyze supply forecast data by the four supply categories with monthly views.
Supply Summary Charts	Click to access the View Supply Forecast Charts page and view charts based on the supply categories.
Forecast Modification History	Click to access the Supply Forecast Modification History page and view each modification to the actual supply in the forecast.

Supply Forecast Detail Page

Use the Supply Forecast Detail page (RS_FR_SUP_DTL) to view the supply details for all of the pools or one particular pool in the supply forecast.

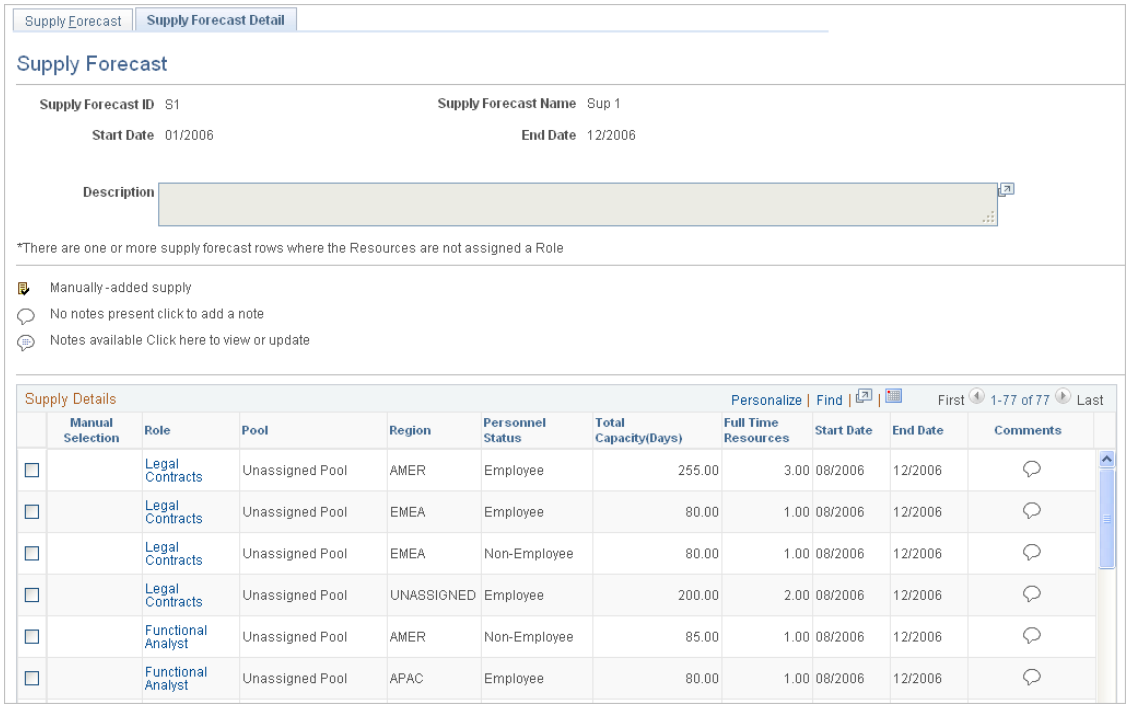
Navigation:

- **Resource Management**, and then **Strategic Capacity Planning**, and then **Supply Forecast**, and then **Supply Forecast Detail**
- Click the **View Supply Forecast** link on the Supply Forecast - Select Pools page.

  Click the **Total** link on the Supply Forecast page.
- Click a pool name in the **Supply Summary** grid on the Supply Forecast page.

This example illustrates the fields and controls on the Supply Forecast Detail page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Description	Enter a description for this supply forecast.
	Indicates that the row was added to the forecast by using the Add New Supply page.
and	Click this icon to enter comments about the supply row. If the icon contains lines, comments already exist for the row. If the icon does not contain lines, no comments exist for the row.

Supply Details

Field or Control	Description
Role, Pool, Region, and **Personnel Status**	These are the supply categories for the resource capacity that appears on the row. Click the role to modify the capacity that appears in the row.
Total Capacity (Hours) or **Total Capacity (Days)**	Displays the resource capacity for the row. The value is based on the unit of measure—either days or hours—selected during installation.
Full Time Resources	Displays the calculation of full-time resources for each row. The system calculates full-time resources based on the start and end dates on each row in the Supply Details grid. You can add a new row of supply that is within the forecast date range but that does not cover the entire range. It's important to note that the calculation is based on the date range specified in that row.

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Field or Control	Description
Start Date and **End Date**	Displays the start and end date for the supply forecast. The system uses these dates to calculate capacity and full-time resources. All rows that are calculated from the resource pools must be the same date range as the forecast period. You can add new supply and specify date ranges within the forecast period. The capacity and full-time resources that the system calculates for the added rows are only based on the dates you entered on the Add New Supply page.

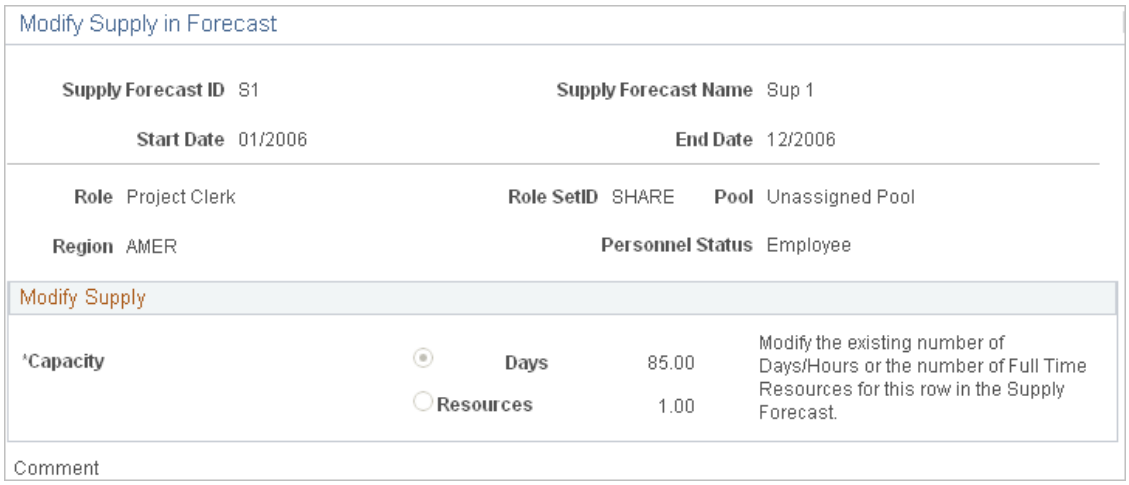
Modify Supply in Forecast Page

Use the Modify Supply in Forecast page (RS_FR_SUP_MOD_SUP) to add or subtract the actual supply in the forecast to, for example, model different scenarios for a given calculated resource pool role row.

Navigation:

Click a link in the **Role** column on the Supply Forecast Detail page.

This example illustrates the fields and controls on the Modify Supply in Forecast page. You can find definitions for the fields and controls later on this page.



The page displays supply categories for the selected row—role, region, pool, and personnel status. You cannot change the supply categories of an existing row that was calculated from a resource pool.

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Field or Control	Description
Capacity	Select capacity **Days** or **Hours,** based on the unit of measure installation setting for capacity planning), or **Resources.** The capacity values appear that exist for the row. The values can be positive or negative numbers. Enter a value in one of the boxes. The system calculates the corresponding value (capacity in days or hours, or full-time resources) in the Supply Details grid after you click **OK.** The new calculation does not appear on the Modify Supply in Forecast page until you reenter that page from the Supply Forecast Detail page.

> **Note**
>
> Changes made to either the **Days** or **Resources** fields are not saved unless the respective option is selected.

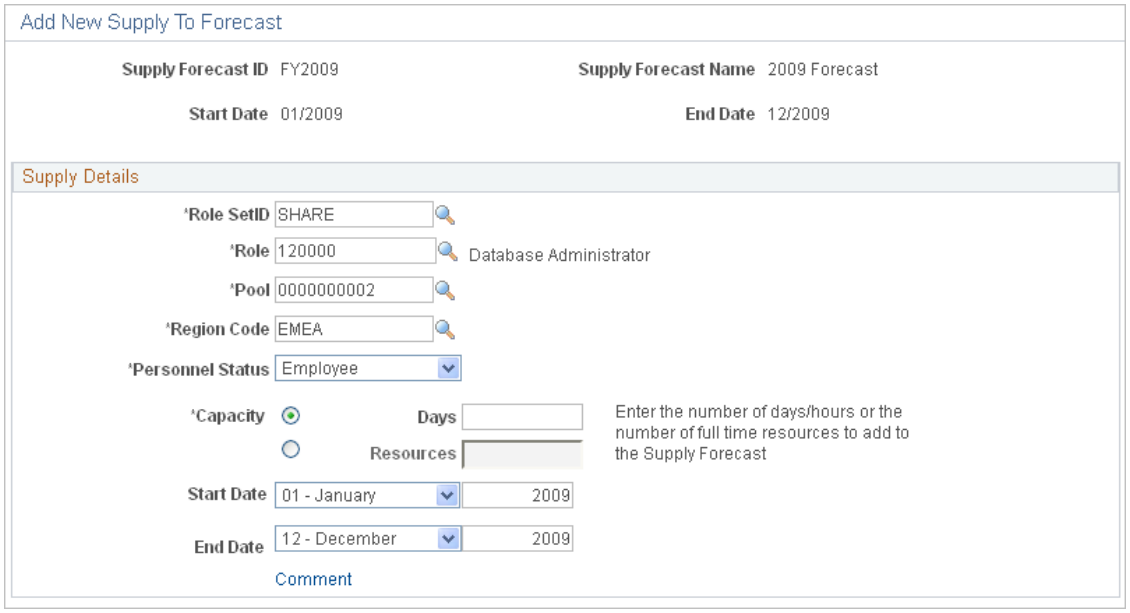
Add New Supply To Forecast Page

Use the Add New Supply To Forecast page (RS_FR_SUP_ADD_SUP) to add additional supply to a forecast.

Navigation:

Click the **Add New Supply** button on the Supply Forecast page.

This example illustrates the fields and controls on the Add New Supply to Forecast page. You can find definitions for the fields and controls later on this page.



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> **Note**
>
> You can enter the same supply categories as an existing row, including the same date ranges.

Field or Control	Description
Role SetID and **Role**	Enter a SetID and any valid role. You can enter roles that are not yet in the forecast.
Pool	Enter a pool ID. If you later remove a pool from the forecast, any new supply rows that you added for that pool are removed from the forecast as well.
Region Code	Enter any valid region. You can enter regions that are not yet in the forecast.
Personnel Status	Select *Employee* or *Non-Employee*.
Capacity	Select **Hours** or **Days,** based on the installation settings, and enter the number of hours or days to add to the supply forecast. Alternatively, select **Resources** and enter the number of full-time resources to add to the supply forecast.
Start Date and **End Date**	Enter the date range over which you want to add this supply in the model. The dates must be within or equal to the supply forecast date ranges. The forecast start and end dates appear by default.
Comment	Click this link to add comments about this new supply.

Modify Region Utilization Page

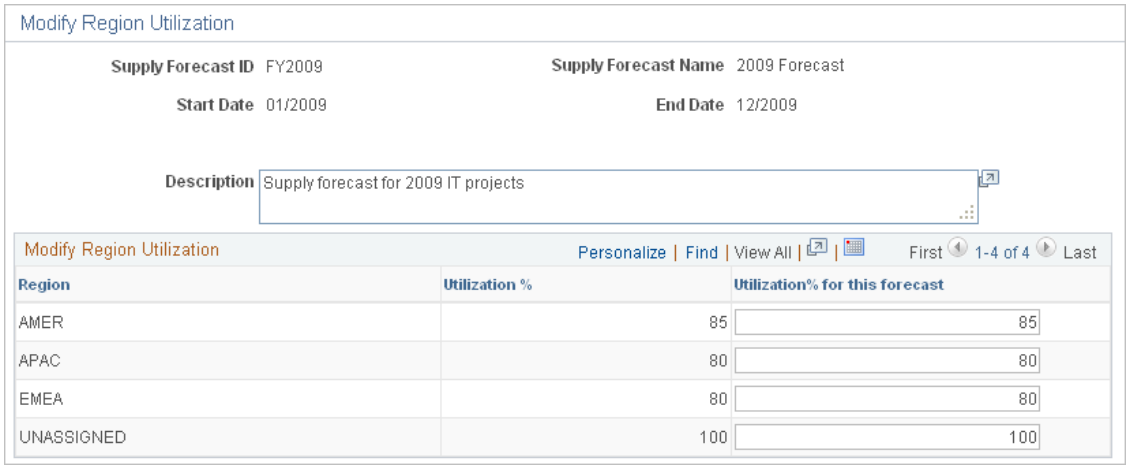
Use the Modify Region Utilization page (RS_FR_SUP_UTIL) to change the utilization percentage for a forecast.

Navigation:

Click the **Modify Region Utilization** button on the Supply Forecast page.

This example illustrates the fields and controls on the Modify Region Utilization page. You can find definitions for the fields and controls later on this page.

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> **Note**
>
> The utilization values only apply to the particular forecast and do not override the *system* region utilization percent.

Field or Control	Description
Description	Enter a description of the modifications.
Region and **Utilization %** (utilization percent)	Displays all the regions that are set up in the system and the utilization percent for the forecast.
Utilization % for this forecast	Enter a different utilization percent. The default value is equal to the **Utilization %** value. The system uses the value you enter to recalculate the supply in the current supply forecast. The value that you enter here remains with this forecast whenever you access it. All supply will be based on the value that you specify in this field.

Supply Forecast Modification History Page

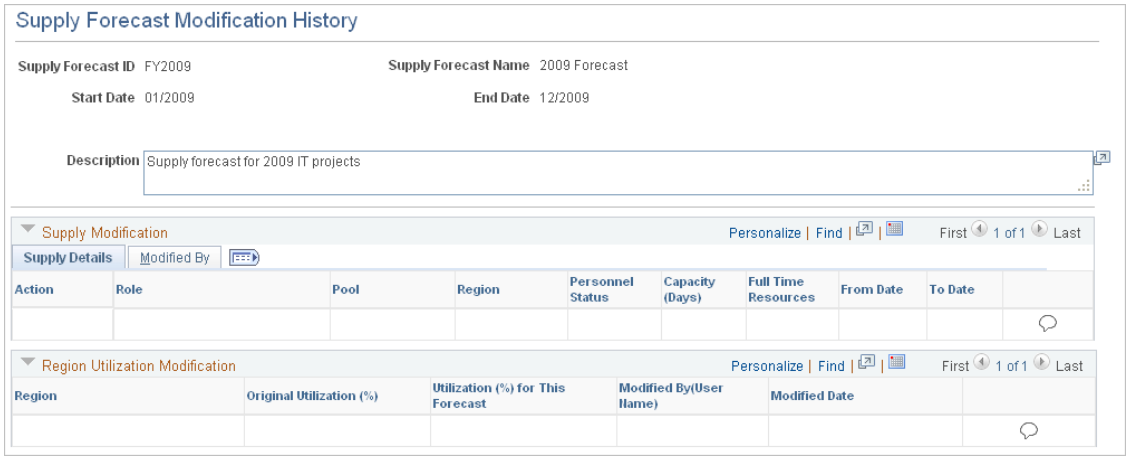
Use the Supply Forecast Modification History page (RS_FR_SUP_MOD) to view details of modifications made to supply forecasts.

Navigation:

Click the **Forecast Modification History** link on the Supply Forecast page.

This example illustrates the fields and controls on the Supply Forecast Modification History page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Action	Possible actions are: **Add:** Indicates that you added a supply using the Add New Supply To Forecast page. **Update:** Indicates that you added or removed an existing supply row that originally came from resource pools. **Delete:** Indicates that you selected a row clicked the **Remove from Forecast** button.
Capacity (Hours) or **Capacity (Days)** and **Full Time Resource**	Displays the difference between the original supply details value and what you changed in the Add New Supply To Forecast or Supply Forecast Modification pages. For example, you update an existing row that was calculated based on the resource pools, and not by adding new supply row. You change the total capacity from 500 days to 250 days, and consequently the full-time resources change from 3 to 1.5. The action is **Update,** the capacity (hours) value in the Supply Forecast Modification History is −250, and the full-time resource value is −1.5.

Supply Analysis Page

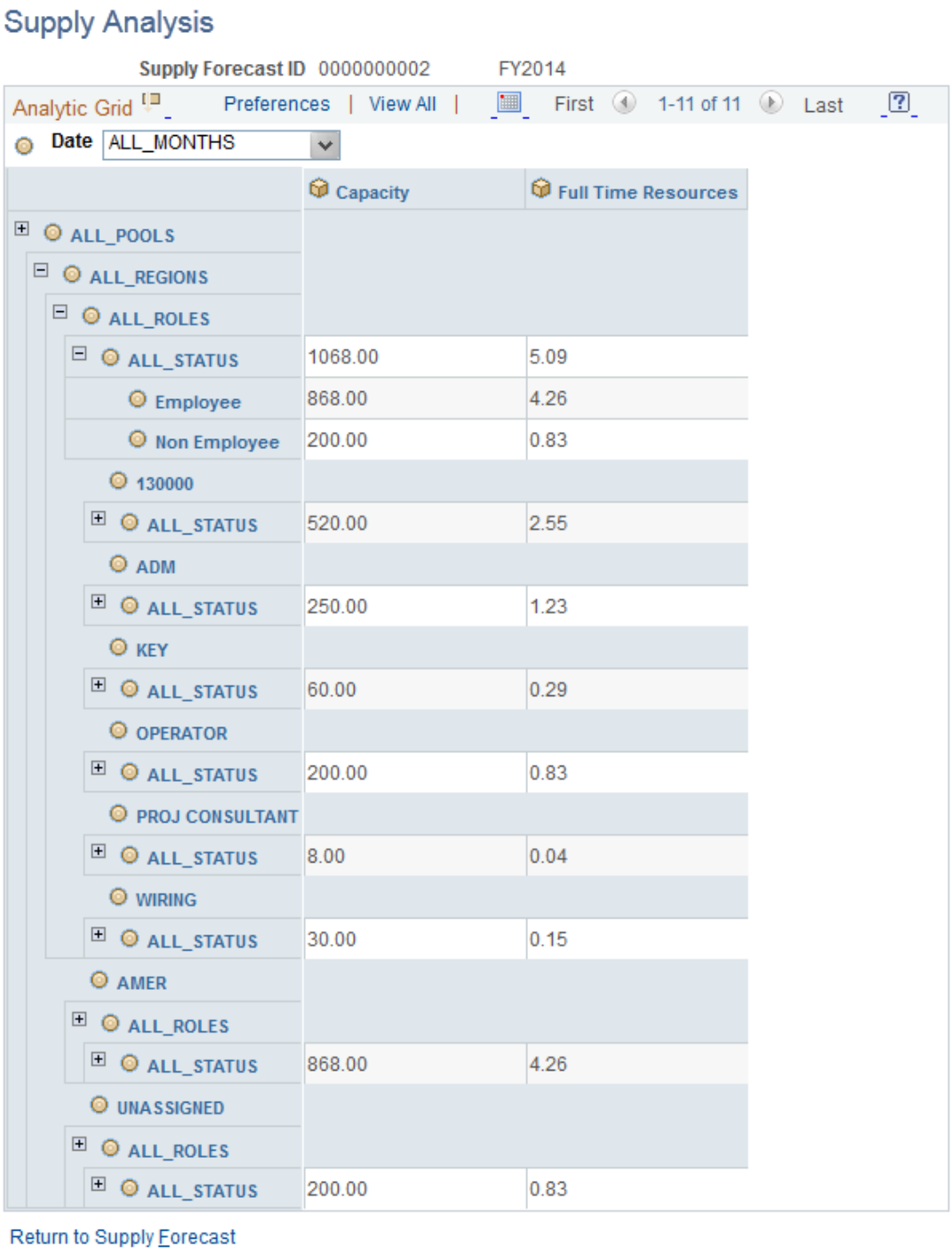
Use the Supply Analysis page (RS_SUP_ACE_PAGE) to analyze supply forecast data by supply categories and months.

Navigation:

Click the **Supply Analysis** link on the Supply Forecast page or Supply Forecast Detail page.

This example illustrates the fields and controls on the Supply Analysis page.

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Manipulate the data based on dimensions, including **Project Role, Pool, Region Code,** and **Personnel Status.** For example, drag and drop the *ALL_ROLES* project role dimension to change the supply analysis view.

You can also see all months, rolled up together or individually, that are part of the forecast.

You can apportion by supply categories to change the total capacity and full-time resource dimensions.

See *PeopleTools : PeopleSoft Analytic Calculation Engine,* "Understanding PeopleSoft Analytic Calculation Engine."

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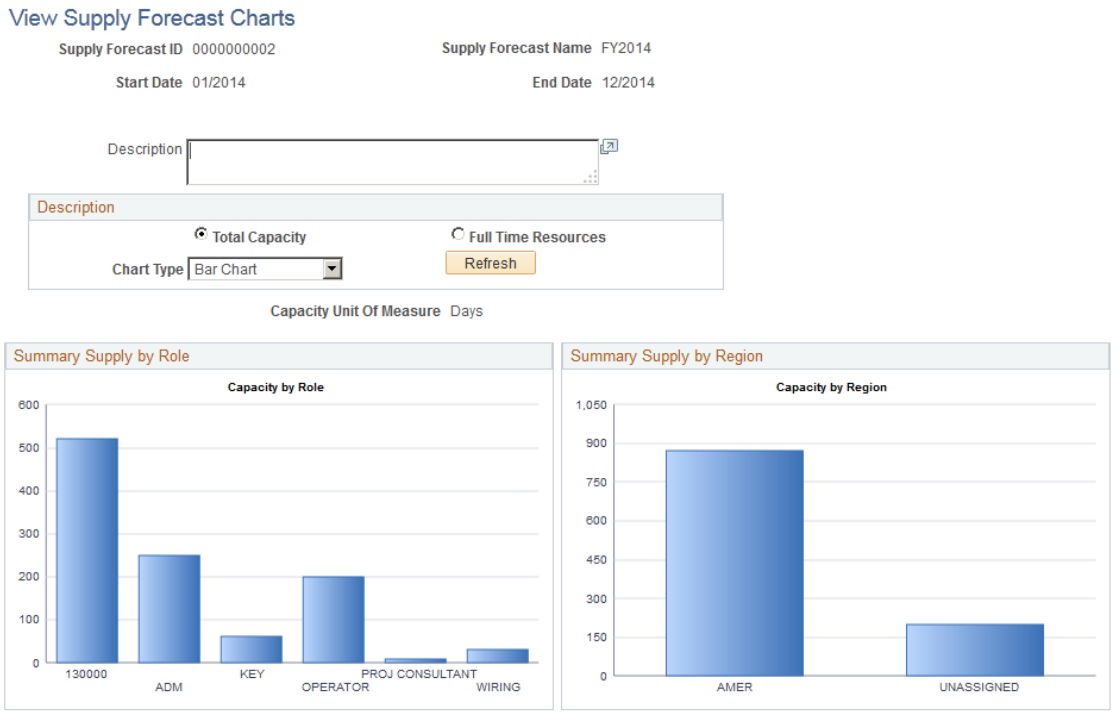
View Supply Forecast Charts Page

Use the View Supply Forecast Charts page (RS_SUP_CHARTS) to view graphical summarized capacity information by supply category.

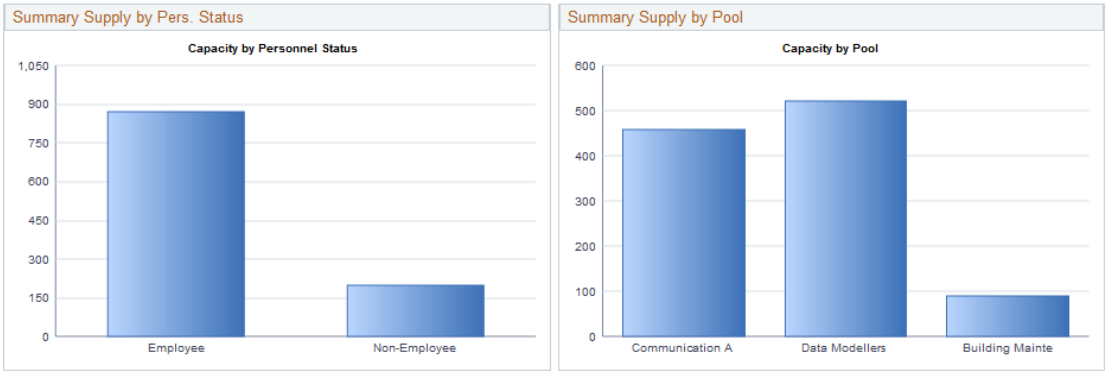
Navigation:

Click the **Supply Summary Charts** link on the Supply Forecast page or Supply Forecast Detail page.

This example illustrates the fields and controls on the View Supply Forecast Charts page (1 of 2). You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the View Supply Forecast Charts page (2 of 2). You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Total Capacity and **Full Time Resources**	View the supply information by selecting **Total Capacity** (in the capacity planning installation level unit of measure of hours or days), or **Full Time Resources.**
Chart Type	Select to view a bar or pie chart.
Refresh	Click to update the charts after you select different chart options.

Copy Forecast Page

Use the Copy Forecast page (RS_FR_COPY) to create copies of existing forecasts with same date range as the original forecast.

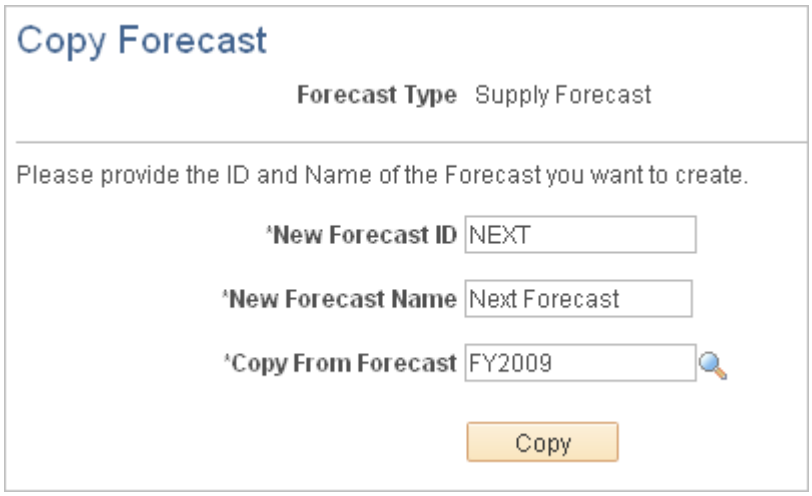
Use this page to copy supply or demand.

Navigation:

Resource Management, and then **Strategic Capacity Planning**, and then **Strategic Capacity Home**, and then **Strategic Capacity Planning Home**

Click the **Copy Forecast** link in the **Supply Forecast** group box or the **Demand Forecast** group box.

This example illustrates the fields and controls on the Copy Forecast page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
Forecast Type	Displays the forecast type that you select from the Strategic Capacity Planning Home page. If you select **Copy Supply Forecast** from the home page, the value is *Supply*. If you select **Copy Demand Forecast** from the home page, the value is *Demand*. **Note:** You can create copies of existing supply forecasts. The newly created copy has the same date range as the original. The main purpose is to enable you to create multiple supply forecasts quickly for the same period to model multiple supply scenarios. For example, one forecast might be for increasing contractor supply, another for moving some supply offshore, and another for modeling zero supply change.
New Forecast ID	Enter the ID for the new supply or demand forecast. The forecast ID can be auto-numbered or assigned manually. If you assign the forecast ID manually, enter up to 15 characters. Auto-numbered forecast IDs are 10 characters long.
New Forecast Name	Enter the name of the new forecast.
Copy from Forecast	Select the forecast that you want to copy.
Copy	Click to access the Supply Forecast page or Demand Forecast Summary page. The system populates the new forecast ID and forecast name on the page. You do not need to click the **Save Forecast** button, as the forecast is already saved as a result of the Copy Forecast Application Engine process (RS_COPY_FRST).

Creating Demand Forecast Models

This topic provides an overview of the demand forecast model and discusses how to create Demand Forecast models.

Pages Used to Create Demand Forecast Models

Page Name	Definition Name	Usage
Load External Demand Page	RS_EXT_DMD	Import and clean up external demand data for use in demand forecasts.
Demand Forecast - Browse For Demand Page	RS_ADD_DMD	Browse for demand from a predefined, filtered list to include in the demand forecast.
Demand Forecast - Search Page	RS_SEARCH_DMD	Search for demand by using a set of multiple search criteria to include in the demand forecast.

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Page Name	Definition Name	Usage
Demand Forecast Summary Page	RS_DMD_SUMMARY	View total time needed (in hours or days) and full-time resource count by application area. This page displays the total time required (in hours or days, with conversion to full-time resource count) by application area only for the selected forecast ID.
Demand Forecast Details Page	RS_DMD_DETAIL	Build and modify demand forecasts.
Demand Summary Charts Page	RS_DMD_CHARTS	View graphical summarized capacity information by demand category.
Demand Analysis Page	RS_DMD_ACE_PAGE	Analyze demand forecast data by supply categories by month.
Demand Forecast - Demand Details Page	RS_DMD_ROLE	View details by role and other demand data, and add new demand to the forecast.
Demand Forecast - Add New Role Page	RS_ADD_NEWROLE_DMD	For the demand, add, modify, or delete roles, and change the level of effort needed for each role.

Understanding Demand Forecast Models

In an IT organization, frequent projections of upcoming work are often required in an effort to improve a company's overall operational efficiency. IT executives need foreknowledge of the potential projects that are coming, to be able to compare the demand on their resources with projections of how much work they can manage given their existing resource constraints.

Whether the demand is as minor as a project to relocate a server (tactical project) or as significant as a system implementation spanning several years (strategic program), the supply of resources must remain adequate to meet the demand for work to be completed. Capacity planning enables management to build supply forecasts based on existing headcount, along with engaging in what-if scenarios so they can determine the effect of adding or cutting resources, obtaining contractor services, and so on. Similarly, the process of collating demand into a demand forecast is also needed.

IT organizations receive demand on their time through multiple methods, ranging from projects to external demand data sourced out of third-party systems. Before creating the demand forecast, the setup of import data and clean up of that data must take place so that it can be used in the demand forecast.

The demand for resources is brought into the demand forecast from the following sources:

- Pending and active projects (from PeopleSoft Project Costing).
- External third-party systems using a generic Excel to Component Interface upload process.

After the preliminary demand forecast is populated with the raw data, you have the ability to add or delete demand from the list, categorize the entries in the list, and prioritize and rank the individual demand's importance for the organization. When you have verified and cleaned up the demand forecast, you can combine it with a similarly verified and clean supply forecast into

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a consolidated supply-demand scenario, where you can perform further what-if scenarios to determine the optimal balance of available resources and pending work for the upcoming projected time period.

> **Note**
>
> The maximum range for demand forecasting is 24 months. Although demand itself can span longer (for example, a five-year implementation project), the forecast only concerns itself with a maximum of two years, and will only pull effort data within that two-year span.

You can upload data with the Excel to Component Interface utility. The component interface used in this process is RS_LOAD_EXT_DMD. This component interface contains all the fields that are required to load demand data into the system.

You first load demand-related data into the Excel spreadsheet. After you run the Excel to Component Interface utility to load the data, you use the Load External Demand page to clean up the data and add any additional information that was not specified in the Excel to Component Interface process.

Demands loaded using the utility display in the Load External Demand page. The External Demand Interface staging table (RS_INTFC_DMD) contains all the rows that you entered in the spreadsheet. All rows are validated against the prompts in the External Search table (RS_DMD_SRCH_EXT), which is driven by business unit. Relevant rows that pass all validation tests are moved to the External Search table for more cleanup. You can add any demand, delete any demand, or update existing demands.

You use the Demand Forecast component (RS_FR_DEMAND) to create, view, and modify demand forecasts.

> **Note**
>
> All data in supply forecasts, demand forecasts, and consolidated scenarios is "point-in-time." This means that if additional resource pools or demand data changes or becomes available on the transactional side, it will not affect any existing forecasts or scenarios—unless you specifically choose to add them afterwards. In other words, forecasts are created based on supply and demand as of the date the forecast was created. If pools and capacity are added a week later, for example, that information does not appear in the supply forecast. You can manually add the supply but it does not automatically appear in the forecast.

Load External Demand Page

Use the Load External Demand page (RS_EXT_DMD) to import and clean up external demand data for use in demand forecasts.

Navigation:

Resource Management, and then **Strategic Capacity Planning**, and then **Maintain External Demand Data**

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> **Note**
>
> You can load third-party data into a staging table by using the Excel to Component Interface spreadsheet, viewed through the RS_EXT_DMD_SRCH component, and validated so that it contains the proper information for enhanced analysis through the scenario component.

Field or Control	Description
Sequence Number	Enter a unique number in the Microsoft Excel spreadsheet. Each batch sequence number is uniquely identified by a load description for every upload process.
Load Description	Enter a unique batch load description. You can vary the name of each run to distinguish the data during the upload process.
Business Unit	Enter a business unit to map external data to either through manual entry in the spreadsheet or at a later point in the during data scrubbing to drive SetID prompting.
Demand ID	Enter an ID, which the system stores in the External Demand Interface staging table. The system assigns items demand IDs during the load process.
Demand Description	Enter any text to identify the demand data row.
Role SetID	Enter the SetID for the resource role requested by the demand.
Project Role	Enter the role requested by the demand.
Program	Enter a higher level categorization of Projects (this is an existing PeopleSoft Program management field). This field is optional.
Effort	Enter the estimated length of time needed for this demand row for this role.
UOM (unit of measure)	Specify corresponding effort capacity in *Days* or *Hours*.
Application Area	Enter the group to which the demand belongs, such as *IT, Marketing*, and so on. Oracle strongly recommends that you populate this field in order to view the data in summarized format in the demand forecast.
Application	Enter an application to describe the system or application to which the demand applies, such as *Program Management, Project Costing,* and so on.
Release	Assign a release to demand lines to account for periodic releases.
Category	Enter a category to categorize the demand, such as *Operational* or *Strategic*.
Requester	Enter the original requester of the project request.
Request Date	Enter the date that the project request was first submitted.

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Field or Control	Description
Status	Indicates whether a project is already active and in operation, as opposed to being in the proposal state. This helps you to determine whether projects that are currently running need to be canceled. Values are: • *In Progress:* Projects in active processing status. • *Pending:* Projects in pending processing status.
Message	Describes the data row's status after the load process.
Add Demand	Click to add a row in the **Demand Data Cleanup** grid. You can enter any demand. The **Demand ID** is generated when a new row is added to the grid.
Validate Demand	Click to validate the demand data for business unit, required key fields, and translate values.
Load Demand	Click to retrieve all the rows from the External Demand Interface staging table. The process populates the Demand Cache table (RS_DMD_CACH) with all the demand data in monthly buckets and deletes the loaded rows from the interface grid in the page.

> **Note**
>
> When entering data in the Load External Demand Data component interface (RS_LOAD_EXT_DMD), it is important to ensure that the LINE_NBR field is not selected for input because it is an auto-generated field; do not enter any value in it.

See the product documentation for *PeopleTools: Component Interfaces*

Demand Forecast - Browse For Demand Page

Use the Demand Forecast - Browse For Demand page (RS_ADD_DMD) to browse for demand from a predefined, filtered list to include in the demand forecast.

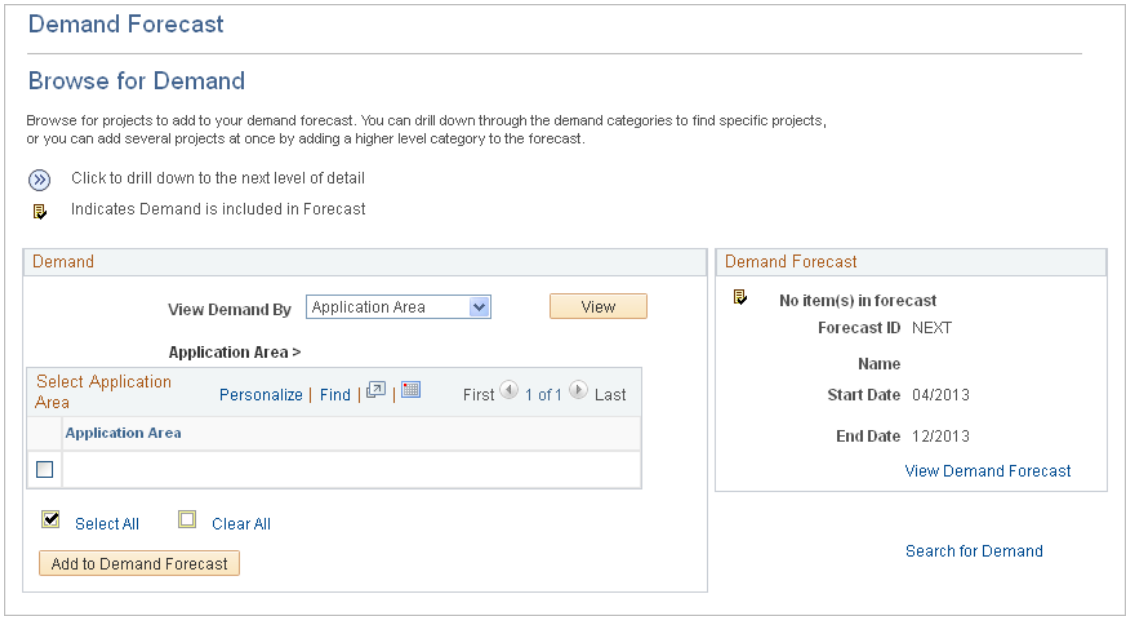
Navigation:

- **Resource Management**, and then **Strategic Capacity Planning**, and then **Capacity Plan Demand Forecast**

  Select **Add a New Value**, **Demand Forecast - Browse for Demand**
- Click the **Continue Selecting Demand** link in an existing demand forecast.

This example illustrates the fields and controls on the Demand Forecast - Browse for Demand page. You can find definitions for the fields and controls later on this page.

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Demand

Field or Control	Description
View Demand By	Filter your demand by selecting one of these options: • *Application Area:* Groups the demand by application area. This is a field on the Project Definitions - General Information page. • *Program:* Groups the demand by program. • *Release:* Groups the demand by release. After you select a filter to view the demand, click the **View** button to display the demand. When you are satisfied with the demand, click the **Add to Demand Forecast** button for the system to add the demand. Select the demand row that you want to add to the forecast. You can click a link to an individual demand and select projects to add to the forecast. **Note:** The demand forecast categorizes demand by application area, release, and program, although none of those fields are required for projects. Therefore, if you do not specify values in these fields, you cannot comprehensively use the Demand Forecast - Browse for Demand page because projects without those fields specified will not be visible. The only way you would be able to select projects to add to a demand forecast is to access the Demand Forecast - Search page where *all* projects within the demand forecast date range are accessible —whether or not application area, release, or program are specified.

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Field or Control	Description
	Click this icon to drill further down to the individual demand level and select projects individually to add to the forecast. For example, click the icon to drill down from application area to application, and then to individual demand.
Add to Demand Forecast	Click to add the selected demand to the demand forecast.
Search for Demand	Click this link if the **Demand** group box does not provide the appropriate information and you need to perform a more detailed search.

Demand Forecast

This group box displays the forecast ID, name, and date range in MM/YYYY format.

Field or Control	Description
View Demand Forecast	Click to access the Demand Forecast Summary page and view total time needed and full-time resource count by application area.
Search for Demand	Click to access the Demand Forecast - Search page and search for demand by using multiple search criteria.

Demand Forecast - Search Page

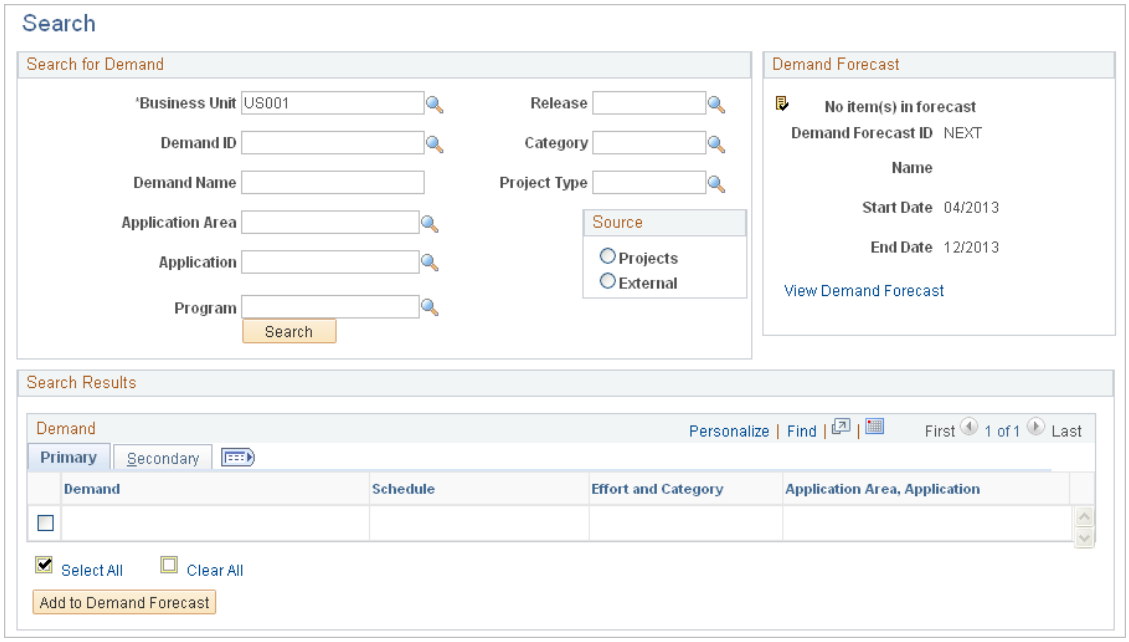
Use the Demand Forecast - Search page (RS_SEARCH_DMD) to search for demand by using a set of multiple search criteria to include in the demand forecast.

Navigation:

Click the **Search for Demand** link on the Demand Forecast - Browse for Demand page.

This example illustrates the fields and controls on the Demand Forecast - Search page.

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This page contains the results of the initial basic search. You can further modify the search parameters, and can search as many times as necessary to find the appropriate demand data.

The fields in the **Demand** grid on this page are the same as the fields on the Demand Forecast Details page, which is discussed in this topic.

Demand Forecast Summary Page

Use the Demand Forecast Summary page (RS_DMD_SUMMARY) to view total time needed (in hours or days) and full-time resource count by application area.

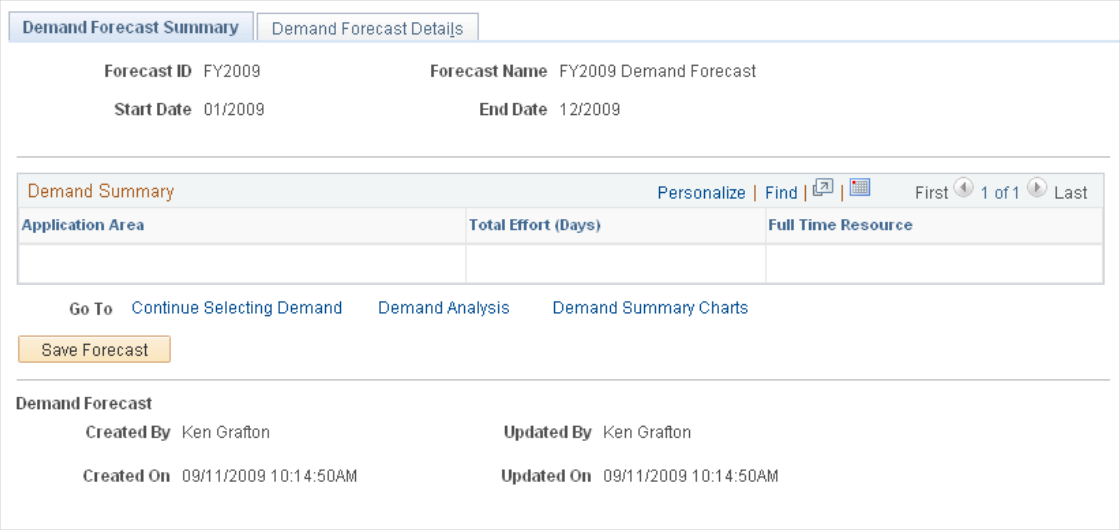
This page displays the total time required (in hours or days, with conversion to full-time resource count) by application area only for the selected forecast ID.

Navigation:

- **Resource Management**, and then **Strategic Capacity Planning**, and then **Capacity Plan Demand Forecast**
- Click the **View Demand Forecast** link on the Demand Forecast - Browse for Demand page.

This example illustrates the fields and controls on the Demand Forecast Summary page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Continue Selecting Demand	Click to access the Demand Forecast - Browse for Demand page and add demand data to the forecast.
Demand Analysis	Click to access the Demand Analysis page to perform further analysis. Perform these actions for all months (month by month), and one month at a time for each month in the forecast.
Demand Summary Charts	Click to access the Demand Summary Charts page and view graphical representations of the selected demand data.

Demand Summary

View the total effort required (in hours or days) with by application area. The system calculates the number of full-time resources needed.

Total effort is based on the project calendar set for the demand (or for the external demand, using the default project calendar for that business unit), and is calculated using the number of days specified for each role on the project in the **Assignment Schedule** group box on the Resource Details page in PeopleSoft Program Management, less weekends and holidays. The system calculates full-time resources by dividing the effort by the number of days per month for a full-time resource (as defined during the capacity planning setup in PeopleSoft Resource Management).

> **Note**
>
> The demand forecast first categorizes demand by the **Application Area** field. On this page, all demand is summarized at the application area. Any demand that does not have application area specified, will not be part of the demand summary; it will not display nor be part of the total full-time resource and capacity.
>
> Demand that does not have application area specified is accessible on the Demand Forecast Details page.

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Click **Save Forecast** to save the forecast, and to populate the lower half of the page with values in these fields:

- **Created By**
- **Updated By**
- **Created On**
- **Updated On**

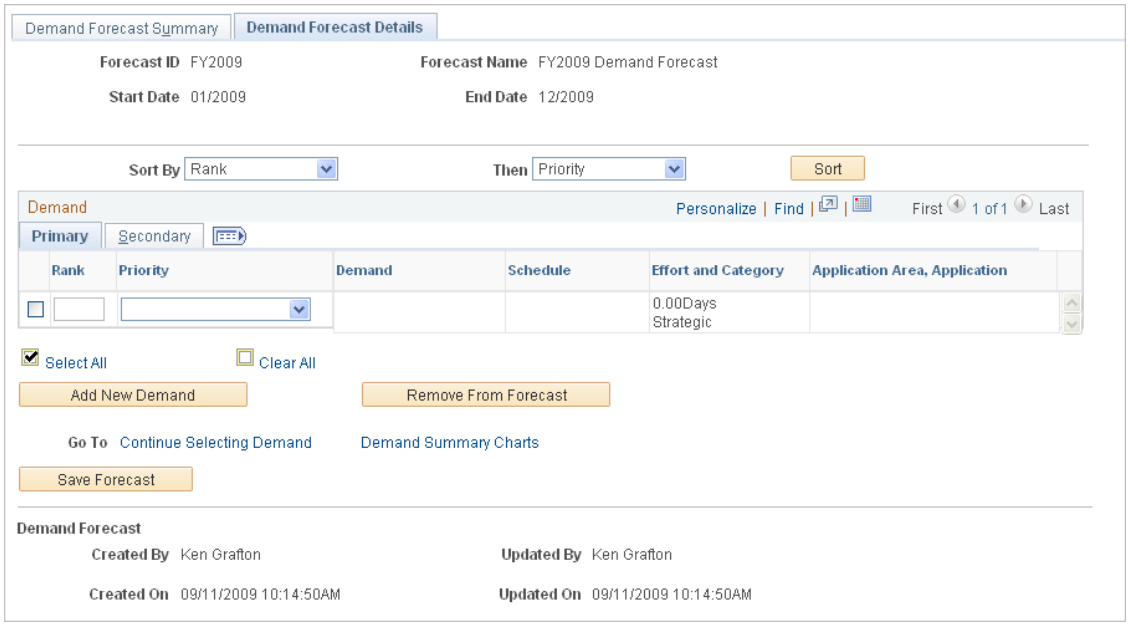
Demand Forecast Details Page

Use the Demand Forecast Details page (RS_DMD_DETAIL) to build and modify demand forecasts.

Navigation:

Resource Management, and then **Strategic Capacity Planning**, and then **Capacity Plan Demand Forecast** . Select the **Demand Forecast Details** tab.

This example illustrates the fields and controls on the Demand Forecast Details page. You can find definitions for the fields and controls later on this page.



> **Note**
>
> Many of the fields on this page behave the same as fields on the Load External Demand page.

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Field or Control	Description
Rank	This is a sequencing field in which you can enter a number to rank demand in order of importance. Two demand rows in the same demand forecast can not have the same ranking. You do not have to rank all demand rows. You can leave gaps between ranking numbers; for example, you can assign a rank of *1*, *2*, and *4*, but not *3*.
Priority	Assign a value of *Critical*, *High*, *Medium*, or *Low* to demand rows for informational purposes only. No processing is done on these fields.
Demand	Displays the demand ID that is a concatenation of the project ID or external demand ID, and the demand description. Click a demand ID link to access the Demand Forecast - Demand Details page to view details of the associated demand row, and modify demand information for the forecast. **Note:** Changing the value of any of these demand details fields does not change the values on the actual project in the system. These demand detail values are used only in this forecast.
Schedule	Displays the demand start and end dates, release, and status. For example: *2007–01–01* *2007–12–31* *Release 9.0* *Pending*
Effort and Category	Displays the estimated length of time needed for this demand row for this role. This is a concatenation of effort, unit of measure, and category. Category is specified on the Project Definitions - General Information page.
Application Area, Application	Displays the application area and application to which the demand applies. Application and application area are specified on the Project Definitions - General Information page.
Demand	Displays a concatenation of the demand ID and the demand description. For example: *M000397* *Bulk Mailer Upgrade*
Business Unit	Displays the demand project business unit.
Program	Displays a PeopleSoft Program Management field that reflects a higher-level categorization of projects and project requests.
Project Type	The project type is specified on the Project Definitions - General Information page.
Demand Source	Displays the source of the demand data.

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Field or Control	Description
Requested by	If the project came from a project request, this field displays the requestor of the project request and the original creation date of the request. If the project was not created from a project request, this field displays the user ID that created the project.
Add New Demand	Click to access the Demand Forecast - Demand Details page and add demand information for the forecast.
Remove From Forecast	Click to delete the selected demand from the Demand Detail table and Demand Forecast Cache table.

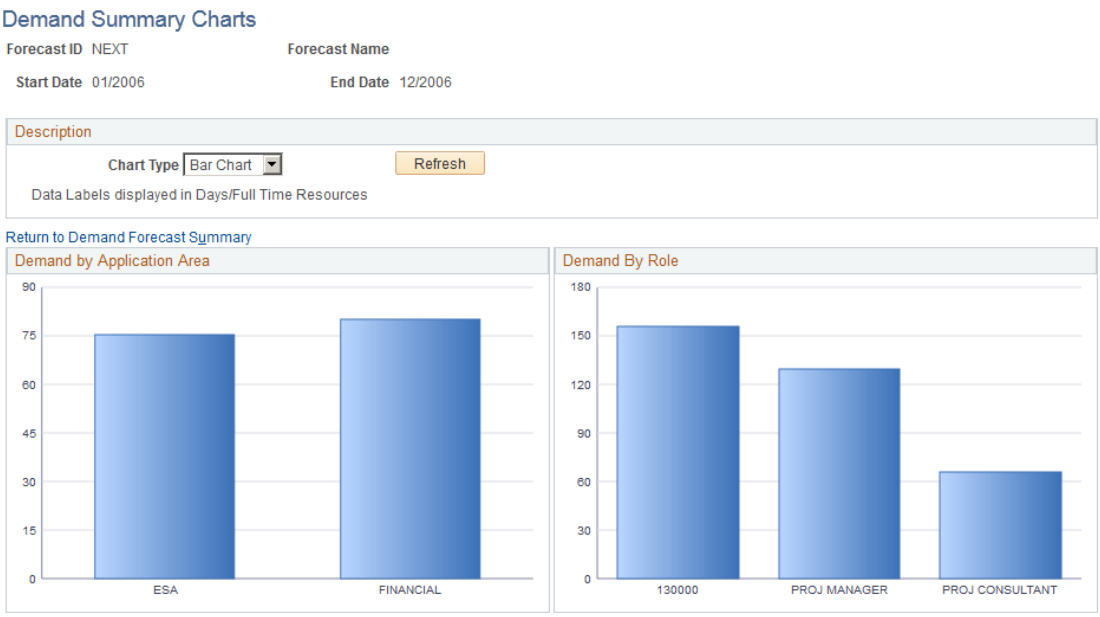
Demand Summary Charts Page

Use the Demand Summary Charts page (RS_DMD_CHARTS) to view graphical summarized capacity information by demand category.

Navigation:

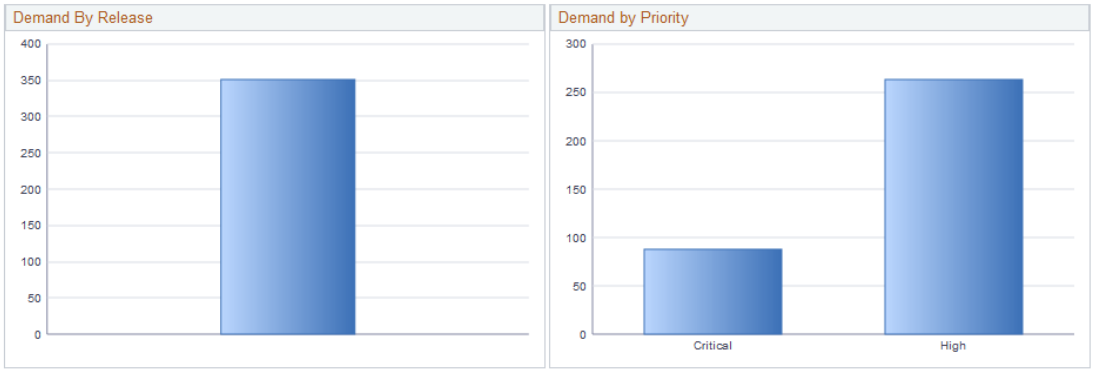
Click the **Demand Summary Charts** link on the Demand Forecast Summary page.

This example illustrates the fields and controls on the Demand Summary Charts page. You can find definitions for the fields and controls later on this page.



This example illustrates the fields and controls on the Demand Summary Charts page (2 of 2). You can find definitions for the fields and controls later on this page.

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- **Demand by Application Area:** Displays the total demand for each application area.
- **Demand by Role:** Displays the total demand for each role.
- **Demand by Release:** Displays the total demand for each release.
- **Demand by Priority:** Displays the total demand for each priority.

Adjacent to each pie chart section is the total effort (in hours or days), full-time resources conversion, and a percent of total field. An example of a pie section label is:

```
950/45  27%
```

This example indicates that the effort is 950 days, 45 full-time resources are required, and this effort is 27 percent of the total pie. This label does not appear on the bar chart view.

Related Topics

- View Supply Forecast Charts Page
  Use the View Supply Forecast Charts page (RS_SUP_CHARTS) to view graphical summarized capacity information by supply category.

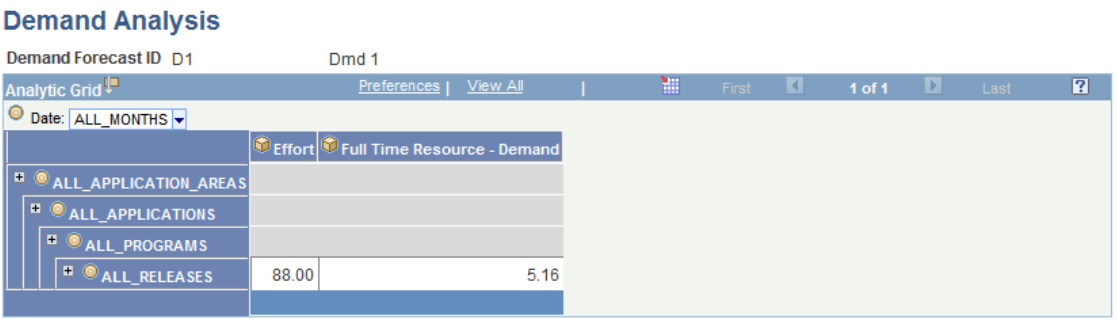
Demand Analysis Page

Use the Demand Analysis page (RS_DMD_ACE_PAGE) to analyze demand forecast data by supply categories by month.

Navigation:

Click the **Demand Analysis** link on the Demand Forecast Summary page.

This example illustrates the fields and controls on the Demand Analysis page.



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This page behaves similarly to the Supply Analysis page, except that you analyze the data by using these categories:

- Total Effort
- Full Time Resources
- Application Area
- Application
- Program
- Release

See the product documentation for*PeopleTools: Analytic Calculation Engine*

Related Topics

- Supply Analysis Page
  Use the Supply Analysis page (RS_SUP_ACE_PAGE) to analyze supply forecast data by supply categories and months.

Demand Forecast - Demand Details Page

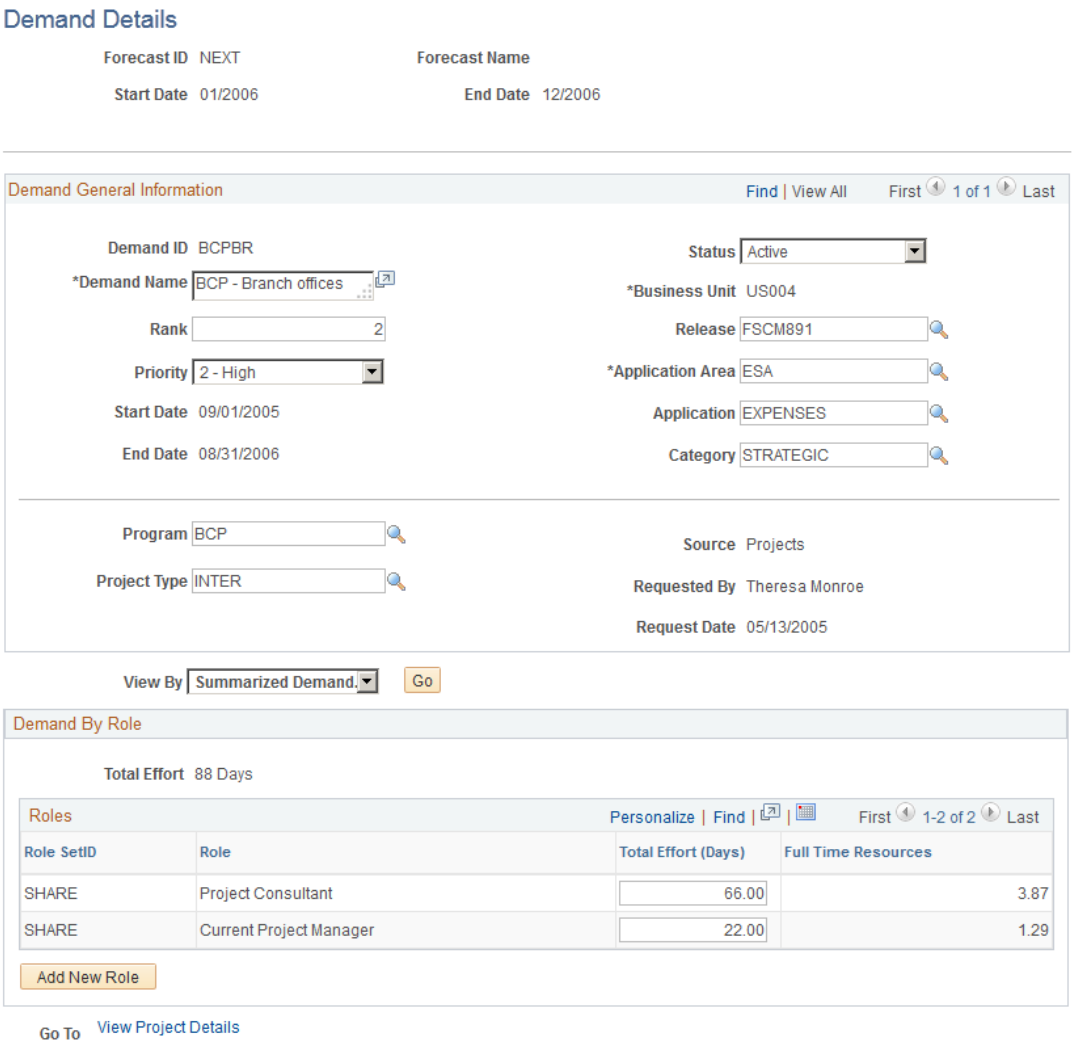
Use the Demand Forecast - Demand Details page (RS_DMD_ROLE) to view details by role and other demand data, and add new demand to the forecast.

Navigation:

- Click a link in the **Demand** column on the Demand Forecast Details page.
- Click the **Add New Demand** button on the Demand Forecast Details page.

This example illustrates the fields and controls on the Demand Forecast - Demand Details page. You can find definitions for the fields and controls later on this page.

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Enter demand detail information in the **Demand General Information** group box.

Field or Control	Description
Add New Role	Click to access the Demand Forecast - Add New Role page and enter SetID and role information to add to the **Demand By Role** group box.
OK	Click to return to the Demand Forecast Details page with the updated information in the **Demand** group box.

This action inserts a row into the Demand Detail table for the specified demand. Demand you enter here is automatically split evenly into the months in the start and end date range that you specified in the demand details.

Demand Forecast - Add New Role Page

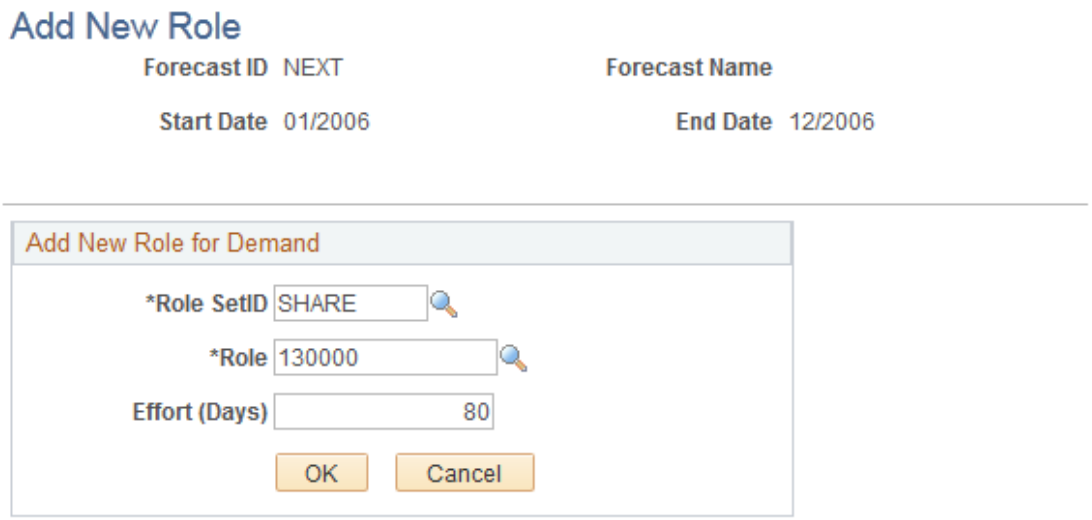
Use the Demand Forecast - Add New Role page (RS_ADD_NEWROLE_DMD) to for the demand, add, modify, or delete roles, and change the level of effort needed for each role.

Navigation:

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Click the **Add New Role** button on the Demand Forecast - Demand Details page.

This example illustrates the fields and controls on the Demand Forecast - Add New Role page.



Enter SetID, role, and effort for the demand.

> **Note**
>
> The unit of measure for **Effort** is either in days or hours based on the installation options.

Conducting Consolidated Scenario Analysis

This topic provides an overview of consolidated scenario analysis.

Pages Used to Conduct Consolidated Scenario Analysis

Page Name	Definition Name	Usage
Consolidated Scenario Analysis - Scenario Summary (approve) Page	RS_SCENARIO_SUMM	View supply summaries and supply and demand metrics with graphical comparison. This page is for users that have security permission to create, save, and approve consolidated scenarios. Permission list EPRS9400 grants users the authority to approve consolidated scenarios, but not to unapprove them.

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Page Name	Definition Name	Usage
Consolidated Scenario Analysis - Scenario Summary (approve and unapprove) Page	RS_SNR_UNAPPROVE	Users with the appropriate security permission can use this page to unapprove a scenario. This page is for users with security permission to create, save, approve, and unapprove consolidated scenarios. Permission list EPRS9500 grants users the authority to approve and unapprove consolidated scenarios. Consolidated Scenario Analysis - Scenario Summary (approve) Page
Consolidated Scenario Analysis - Commitment Line Page	RS_SCENARIO_DTL	Commit or defer the demand for a particular scenario.
Consolidated Scenario Analysis - Demand Details Page	RS_SNR_DEMAND_DTL	Adjust forecasted and allocated demand and modify project header information.
Consolidated Scenario Analysis - Assumptions Consolidated Scenario Analysis - Scenario Summary (approve) Page	RS_SCENARIO_ASSUMP	After you approve the scenario, enter assumptions that assisted in approving the scenario. The Approve button is available only if the scenario is in a pending status.
Consolidated Scenario Analysis - Demand Details Page	RS_ADD_ROLE_DMD	Enter the role SetID, role, forecasted demand, and allocated demand information to create a new role for the demand.
Consolidated Scenario Analysis - Supply Details Page	RS_SNR_SUPPLY	Modified the supply forecast and view over-allocated roles.
Consolidated Scenario Analysis - Edit Supply By Region Page	RS_SNR_EDIT_REGION	Modify a role's forecasted supply by region. Consolidated Scenario Analysis - Supply Details Page
Consolidated Scenario Analysis Page	RS_CON_ACE_PAGE	Analyze consolidated scenario data by supply categories by month. Consolidated Scenario Analysis - Scenario Summary (approve) Page

Understanding Consolidated Scenario Analysis

The consolidated scenario analysis is the final of three primary components in the Capacity Planning process flow. When you begin the capacity planning process, you can choose to build the supply or demand forecasts in any order. Supply and demand forecasts are typically built by different users. Both forecasts must be completed and available prior to performing the consolidated scenario analysis.

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The currency code determines how the consolidated scenario displays estimated cost information. For example, if you select USD and the role rates by region are in another currency, the system converts the currency to USD during the calculation of the blended rate, so that estimated costs for supply and demand can be shown in USD.

> **Note**
>
> If the same forecast is included in more than one scenario prior to either forecast being approved, as soon as one of the scenarios is approved, both forecasts are locked. The unapproved forecast can no longer be approved and will have a status of Obsolete.

By using a consolidated scenario analysis, you can:

- View graphs of the combined supply-demand forecasts.
- Project the amount of demand to which your organization can realistically commit based on the supply constraints.
- Perform further modification of supply and demand forecasts to model what-if scenarios.
- Approve a consolidated scenario and track assumptions that are integral to the scenario's approval.

Use the Combined Scenario component (RS_SCENARIO) to conduct a consolidated scenario analysis.

Consolidated Scenario Analysis - Scenario Summary (approve) Page

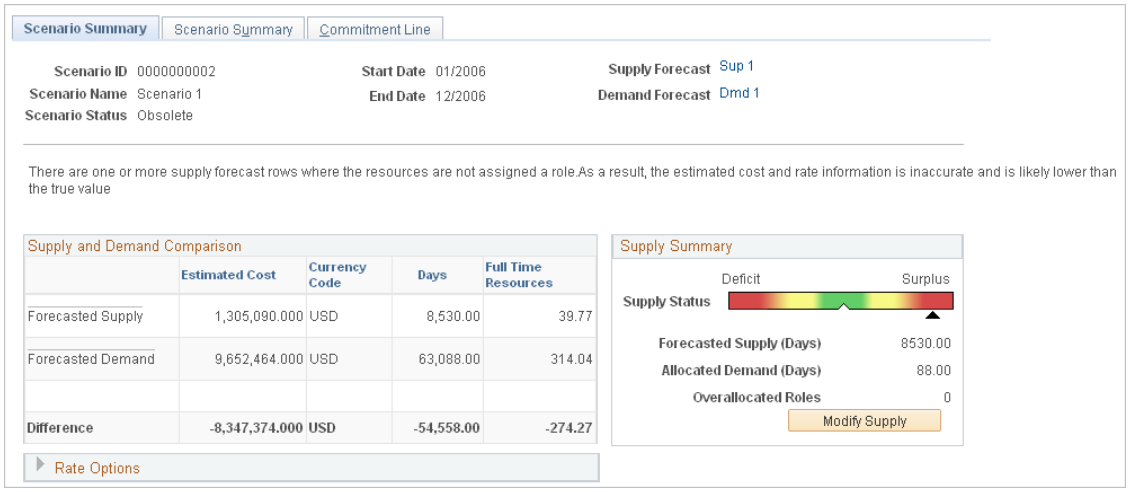
Use the Consolidated Scenario Analysis - Scenario Summary (approve) page (RS_SCENARIO_SUMM) to View supply summaries and supply and demand metrics with graphical comparison.

Navigation:

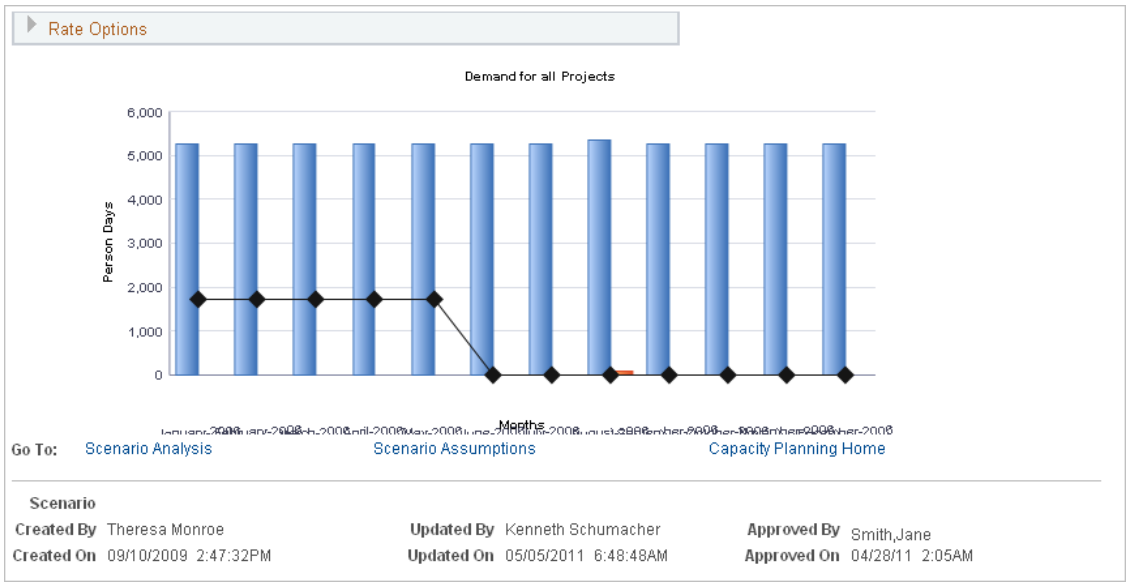
Resource Management, and then **Strategic Capacity Planning**, and then **Consolidated Scenario Analysis**, and then **Scenario Summary**

This example illustrates the fields and controls on the Consolidated Scenario Analysis - Scenario Summary page (1 of 2). You can find definitions for the fields and controls later on this page.

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This example illustrates the fields and controls on the Consolidated Scenario Analysis - Scenario Summary page (2 of 2). You can find definitions for the fields and controls later on this page.



Field or Control	Description
Scenario ID	Displays the scenario that was either auto-generated or manually assigned when the scenario was created.
Scenario Status	Displays the scenario status which can be *Pending*, *Approved,* or *Obsolete*. A scenario starts in a pending status until it is approved. A scenario can become obsolete if another scenario using either the same supply or demand forecast has already been approved.
Start Date and **End Date**	Displays the start and end dates from the supply and demand forecasts you selected for this scenario.

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Field or Control	Description
Supply Forecast and **Demand Forecast**	Displays the supply forecast and demand forecast for the consolidated scenario analysis. The date ranges for the supply and demand forecasts must be an exact match to be eligible for analysis. The initial supply and demand forecast prompts return only the supply or demand forecasts that are not approved on another scenario, because approving a scenario locks the scenario *and* the forecasts.

Supply and Demand Comparison

The supply and demand metrics compare total forecasted supply against total forecasted demand for the selected forecasts.

Field or Control	Description
Estimated Cost	For *Forecasted Supply*, the system calculates the cost of each resource by using the rate by role by region, including currency conversion. For *Forecasted Demand*, it is possible to have demand that calls for specific roles but does not specify region. To calculate estimated costs, the system initially uses the blended rate. The system calculates the blended rate by multiplying the role rate by region by the capacity for each supply forecast row, adding the results for each row, and dividing by the total capacity. The system multiplies the blended rate by the total demand hours to determine the forecast demand estimated cost. You can override the blended rate for a scenario.
Days or **Hours**	Displays the total number of days (or hours depending on setup) available in the selected supply and demand forecasts (includes all roles in the forecast).
Full Time Resources	Displays the number of full-time resources by category that are needed for the forecasted supply and forecasted demand. **Note:** To convert to full-time resources, the system uses the installation settings for the number of days per month and the total number of days in one month. The system calculates full-time resources for demand by using the region utilization percentage that is based on the default capacity planning region code that is specified on the Installation Options - Resource Management page. Full-time resources for supply are based on the full-time resources that are calculated in the supply forecast. See Application Fundamentals: Defining Resource Management Installation Options.

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Supply Summary

Field or Control	Description
Supply Status	There are five possible statuses, indicated visually by the colored bar with the black triangular pointer: • Extreme Supply Capacity Shortage (pointer at far left of the spectrum): Indicates that forecasted supply is less than allocated demand and the difference between the two is ≤ −25%. • Slight Supply Capacity Shortage (middle left of the spectrum): Indicates that forecasted supply is less than allocated demand and the difference is: −10% ≥ difference > −25%. • Reasonable Supply and Demand Match (middle of the spectrum): Indicates that forecasted supply is either less than or greater than allocated demand and the difference is: −10% < Difference < +10%. • Slight Supply Capacity Surplus (middle right): Indicates that forecasted supply is greater than allocated demand and the difference is: +10% ≤difference < +25%. • Extreme Supply Capacity Surplus (far right): Indicates that forecasted supply is greater than allocated demand and the difference is: > +25%.
Forecasted Supply	Displays the total capacity of the selected supply forecast for all roles.
Allocated Demand	Displays the total committed effort from the Demand - Summary grid on the Consolidated Scenario Analysis - Commitment Line page. **Note:** When you enter a new scenario, the system sets all demand lines to *Commit* by default. You can change the *Commit* to *Defer* on each demand line as needed, thus reducing the total demand.
Overallocated Roles	Displays the number of roles that dropped below available supply. This is a sum of individuals based on the available roles in the supply forecast.
Modify Supply	Click to access the Consolidated Scenario Analysis - Supply Details page to modify the forecasted supply by role, and add new roles.

Rate Options

Expand this group box to view the blended cost rate that the system calculates for the supply and demand comparison. You can use the calculated rate or override the rate. Any rate changes that you make are valid only for this scenario.

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> **Note**
>
> The blended rate is for the supply and demand comparison for all roles and all regions. There is no blended rate by role.

Field or Control	Description
Recalculate	Click to calculate estimated costs based on the selected rate.

Demand for all Projects

This bar graph shows these three dimensions by month:

- Forecasted Demand
- Allocated Demand
- Forecasted Supply

This data is an aggregate total for the entire supply and demand forecast. The y-axis represents the effort level in days or hours, and the x-axis represents monthly periods.

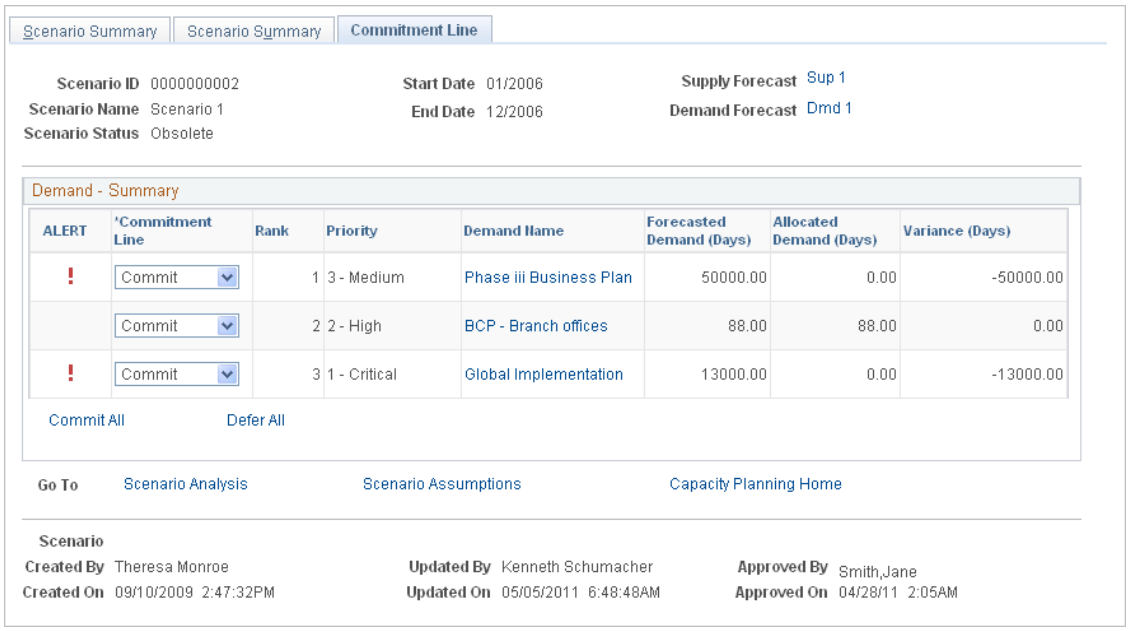
Consolidated Scenario Analysis - Commitment Line Page

Use the Consolidated Scenario Analysis - Commitment Line page (RS_SCENARIO_DTL) to commit or defer the demand for a particular scenario.

Navigation:

Resource Management, and then **Strategic Capacity Planning**, and then **Consolidated Scenario Analysis**, and then **Commitment Line**

This example illustrates the fields and controls on the Consolidated Scenario Analysis - Commitment Line page. You can find definitions for the fields and controls later on this page.



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Field or Control	Description
	Indicates that allocated demand is less than forecasted demand for the corresponding row. The variance appears as a negative value.
Commitment Line	Select an action to commit or defer the demand. **Note:** When you create a scenario, the system automatically commits all demand entries in the forecast and modifies allocated demand to match forecasted demand. However, if the value in this column is *Defer* and you change it to *Commit*, the system does not override the **Allocated Demand** field with the **Forecasted Demand** field value. The system does not assume that you are committing to all the forecasted demand—only what you manually enter for allocated demand.
Rank	Displays the sequential ranking that you assigned to the demand.
Priority	Displays the demand priority of *Critical*, *High*, *Medium*, or *Low*.
Demand Name	Displays the project or external demand description. Click a demand name to access the Consolidated Scenario Analysis - Demand Details page to modify the allocated and forecasted demand by role and month.
Forecasted Demand	Displays the total effort for the project in the demand forecast. This total is for the date range specified in the scenario forecasts only.
Allocated Demand	Displays the total demand effort that is set aside for this project. Initially, when the system commits to all demand by default, this field is automatically set to match the forecasted demand values for the corresponding row. Click a demand name to access the Consolidated Scenario Analysis - Demand Details page to modify the allocated demand.
Variance	Displays the difference of the allocated demand value minus the forecasted demand value for the corresponding row. The initial value is *0* since the system automatically commits to all demand. The system recalculates the value as you adjust forecasted or allocated demand. When the variance is a negative value, an **ALERT** icon appears at the beginning of the row. This indicates that allocated demand is less than forecasted demand for the corresponding row.
Commit All and **Defer All**	Click to change the value in the Commitment Line column to *Commit* or *Defer* for all rows.
Save	Click to save the scenario data and update the original supply and demand forecasts with the applicable changes.

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Field or Control	Description
Approve	Click to access the Consolidated Scenario Analysis - Assumptions page to log assumptions and approve the scenario. This action locks the consolidated scenario and the associated supply and demand forecasts.
Scenario Analysis	Click to access the Consolidated Scenario Analysis page and analyze consolidated scenario data by supply categories by month.
Scenario Assumptions	Click to access the Consolidated Scenario Analysis - Assumptions page and enter additional information about the scenario.
Capacity Planning Home	Click to access the Strategic Capacity Planning Home page to view and copy the five most recently accessed scenarios, supply forecasts, and demand forecasts.

Consolidated Scenario Analysis - Demand Details Page

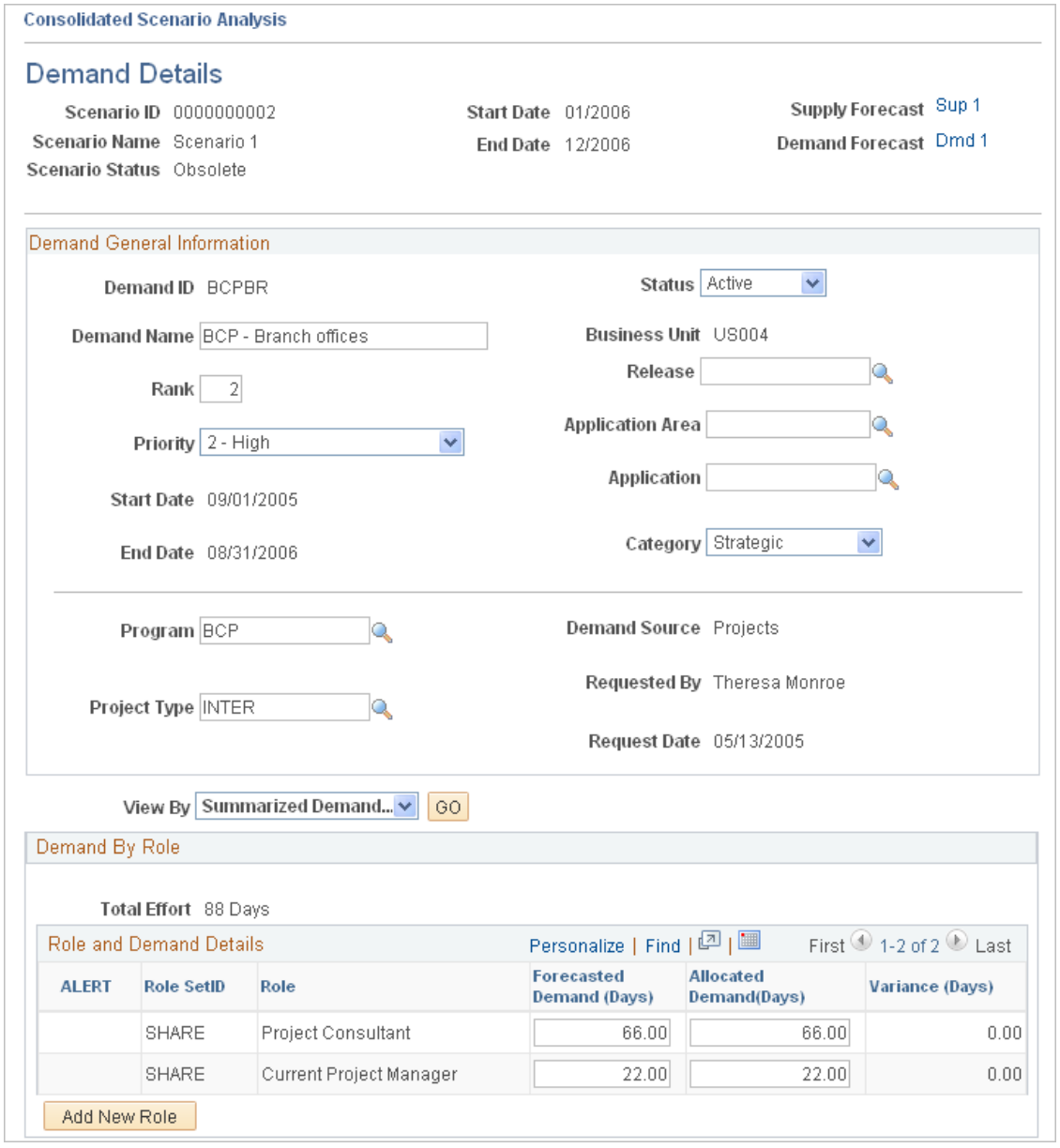
Use the Consolidated Scenario Analysis - Demand Details page (RS_SNR_DEMAND_DTL) to adjust forecasted and allocated demand and modify project header information.

Navigation:

Click the demand name link on the Consolidated Scenario Analysis - Commitment Line page.

This example illustrates the fields and controls on the Consolidated Scenario Analysis - Demand Details page. You can find definitions for the fields and controls later on this page.

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Demand General Information

In this group box, you can view information about the forecasted or allocated demand, and modify some of the demand attributes.

> **Note**
>
> Modifying information on this page does not modify the corresponding project.

Demand By Role

The columns that appear in this group box vary based on the **View By** selection. You can view the demand by *<Month/Year>, All Months,* or **Summarized Demand.**

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Field or Control	Description
Forecasted Demand and **Allocated Demand**	Enter new values as required. Since these rows display the effort by role and month, any modification changes the demand forecast data at the lowest level of the forecast. If you view the rows by *Summarized Demand*, changes that you make are spread across all months of the demand. Changes to the allocated demand on this page are reflected in the scenario on the Commitment Line page. The values for allocated demand are part of the scenario only and are not sourced from the initial demand forecast.
Variance	Displays allocated demand minus forecasted demand.
View project details	Click to access the Project Definitions - General Information page in a new page if the demand is associated with a project. If it is from an external demand, the **View project details** link is not available.
Add New Role	Click to access the Add New Role. New roles that are added at the summarized level are split evenly across the months in the scenario, for the Unassigned resource pool, with a blank personnel status. You view the role by month to enter the data more precisely. To delete a role, enter *0.00* in the fields for the row. **Note:** Because region is SetID-specific, if you add a role in either demand or supply in a consolidated scenario, the system uses the default region that is specified on the Installation Options - Resource Management page. It is recommended that you create regions under one SetID unless your resources are spread across multiple SetIDs.

Click **OK** to return to the Consolidated Scenario Analysis - Commitment Line page. The updated demand summary data is reflected on the page.

Consolidated Scenario Analysis - Supply Details Page

Use the Consolidated Scenario Analysis - Supply Details page (RS_SNR_SUPPLY) to modified the supply forecast and view over-allocated roles.

Navigation:

Click **Modify Supply** on the Consolidated Scenario Analysis - Scenario Summary page.

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> **Note**
>
> You can modify the overall forecasted supply level for the role without drilling down to the region level to adjust supply. Any change to the supply is automatically allocated to the region that is defined on the Installation Options - Resource Management page, and to the Unassigned resource pool. You can adjust supply for each role at the region level by clicking the role link.

Field or Control	Description
Role	Click a link in this column to access the Consolidated Scenario Analysis - Edit Supply By Region page and adjust forecasted supply by region.
View By	When you first access this page, the **Supply** group box displays the summary of all months in the scenario date range. You can change the view by selecting one of these values and clicking the **Go** button: • *<Month/Year>:* Shows the data only from that month. The values are dynamically generated based on the start and end dates of the scenario. • *All Months:* Shows data from all months in the scenario with each month shown separately. • *Summarized Supply:* Shows summarized data.
ALERT	An **ALERT** icon appears when the variance is negative. The icon is visible regardless of the **View By** selection; however, if you select a specific individual month, the system verifies whether that particular month has a negative variance. The **ALERT** icon does not appear if a role is over-allocated *overall*, but is not over-allocated in the specific month being viewed.
Forecasted Supply	Displays the total capacity forecasted for the current month by role for all regions. Changing data on this page does not specify the region for which capacity is being changed; therefore, the system places any additional capacity into the default region specified on the Installation Options - Resource Management page. The system also places negative changes—changes in which you decrease capacity—into the default region with a negative modifier, such as −100 if you change a value from 500 to 400. Any *Summarized Supply* data changes at this level are divided among all of the months in the scenario date range in the default region. For data changes made at the *<Month/Year>* level, the system updates only the specific month in the default region.

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Consolidated Scenario Analysis - Scenario Summary (approve) Page

Use the Consolidated Scenario Analysis - Scenario Summary (approve) page (RS_SCENARIO_SUMM) to View supply summaries and supply and demand metrics with graphical comparison.

Navigation:

Resource Management, and then **Strategic Capacity Planning**, and then **Consolidated Scenario Analysis**, and then **Scenario Summary**

Click the **Approve** button to approve the scenario.

The Consolidated Scenario Analysis - Assumptions page appears so that you can enter any assumptions that assisted in approving the scenario.

> **Note**
>
> Owner information that you enter on the Consolidated Scenario Analysis - Assumptions page is not used for workflow.

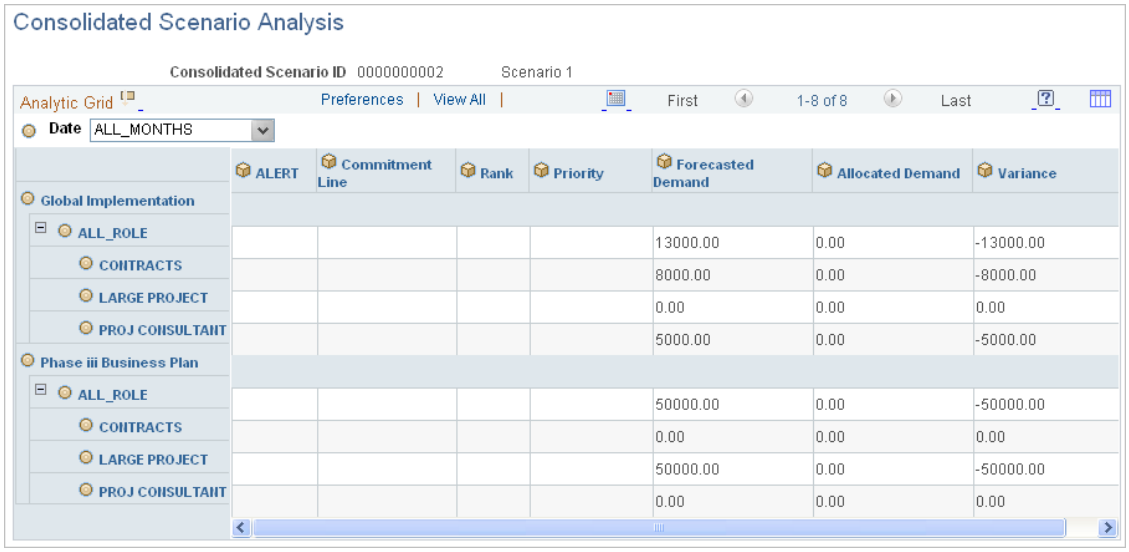
Users with security to unapprove scenarios have access to the **Unapprove** button on the Consolidated Scenario Analysis - Scenario Summary (unapprove) page. Click the **Unapprove** button to return the consolidated scenario, and the associated supply and demand forecasts, to an editable format.

> **Note**
>
> Approving a consolidated scenario does not trigger workflow, nor does it affect the projects or resources in the system. Approving a consolidated scenario simply locks the scenario and the associated supply and demand forecasts.

Analyzing Consolidated Scenarios

This example illustrates the fields and controls on the Consolidated Scenario Analysis page.

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This page behaves similarly to the Supply Analysis page and Demand Analysis page, except that you analyze the data by using these categories:

- Alert
- Commitment Line
- Allocated Demand
- Rank
- Priority
- Forecasted Demand
- Variance

See the product documentation for *PeopleTools: Analytic Calculation Engine*

Related Topics

- Demand Analysis Page
  Use the Demand Analysis page (RS_DMD_ACE_PAGE) to analyze demand forecast data by supply categories by month.

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Using the Resource Management WorkCenter and Dashboard

Understanding the Resource Management WorkCenter and Dashboard

The Resource WorkCenter is a central navigational component that is designed for the end user. The goal of the WorkCenter is to help an end user become more efficient by accessing frequently used pages and pagelets, and by keeping multiple pages open while performing daily tasks.

The Resource WorkCenter is delivered with sample data. It is the responsibility of the system administrator from your organization to design and create links so that users can view and access specific links, pages, and pagelets.

For information about setting up PeopleTools options for the WorkCenter, see *PeopleTools: Global Technology*

PeopleSoft Classic WorkCenter Tabs and Pagelets

There are common pagelets within a WorkCenter:

- Main tab:
  - My Work
  - Links
- Reports/Queries:
  - Queries
  - Reports and Processes

WorkCenters also provide a Welcome pane, which appears to the right of the left pane. A Welcome page explains some of the basic icons that are used throughout the WorkCenter. If a system administrator or an end user (if given access rights) selects the **Starting Page** check box on the Configure Pagelets component for My Work, Links, Queries, or Reports/Processes, then the option selected replaces the Welcome page in this pane.

Pagelets and Pagelet Setup, Maintenance, and Personalization

This topic provides a general, high-level description of the four types of pagelets that are available in PeopleSoft Classic WorkCenters:

- My Work Pagelet
- Links Pagelet
- Queries Pagelet
- Reports and Processes Pagelet

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- Pagelet setup, maintenance, and personalization

My Work Pagelet

The My Work section of the Main tab includes links to pages that an end user would need to access on a daily basis. The My Work section can also include exceptions and alerts, where the user would need to take some type of action.

Some links that are set up for the My Work pagelet can be subject to filter criteria that limit the amount of data that is available to a user.

The My Work section can be personalized by end users by clicking the **Pagelet Settings** icon and then selecting Personalize.

Links Pagelet

The Links section of the Main tab includes additional links to pages or other areas of interest to the user role. A system administrator can determine a list of links that are available to end users, and the end user can personalize which links they want to appear on their WorkCenter.

Links to external pages can be placed in this section as well.

Queries Pagelet

The Query section of the Reports/Queries tab includes links to Query Manager, public queries, private queries, and pivot grids. The system administrator can determine if an end user can add public or private queries. The end user can personalize their private queries.

When a link is selected, the query or pivot grid results appear in the right pane of the WorkCenter or in a new window. Query results can be saved to Microsoft Excel.

Reports and Processes Pagelet

The Reports and Processes section of the Reports/Queries tab includes links to reports and processes. The links take you to the run control page for reports, processes, and the Reporting Console.

The system administrator can determine whether end users can configure their pagelet.

Pagelet Setup, Maintenance, and Personalization

When setting up and maintaining a Classic WorkCenter, setup options are defined at the system administrator level, and personalization options are defined at the user level.

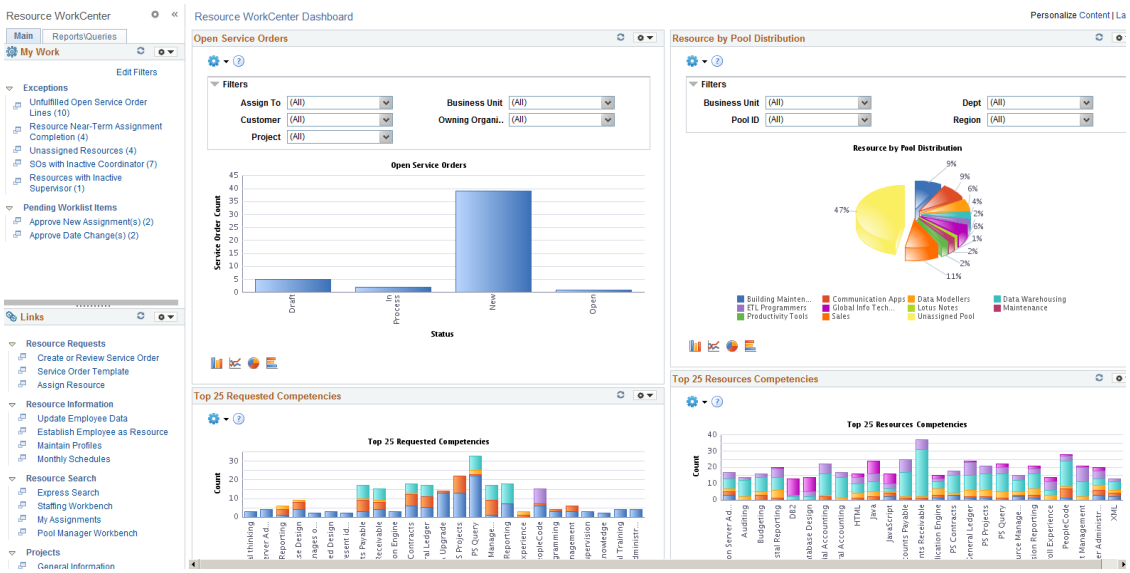
System administrators must perform their setup options first, using the Enterprise Components, WorkCenter/Dashboards component. End users perform their personalization options second, using the Personalize and Configure options in the Classic WorkCenter.

Example: Resource WorkCenter

This example illustrates how the Resource WorkCenter can be set up:

This example illustrates the fields and controls on the Resource WorkCenter Page. You can find definitions for the fields and controls later on this page.

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The right side of the page has been configured as Welcome page and can be configured to display specific pagelets and Dashboards that provide specific information as soon as a user accesses the WorkCenter.

To review more information about the links that appear in each pagelet, see:

- Understanding the Resource WorkCenter - My Work
- Understanding the Resource WorkCenter - Links
- Understanding the Resource WorkCenter - Reports and Processes Pagelet

Related Topics

- Enterprise Components: Configure Pagelets - WorkCenter/Dashboard Page
- Enterprise Components: Configure Pagelets - My Work Page
- Enterprise Components: Configure Pagelets - Links Page
- Enterprise Components: Configure Pagelets - Queries Page
- Enterprise Components: Configure Pagelets - Reports/Processes Page

Understanding Dashboards and Pagelets

Setting up PeopleSoft Dashboards is similar to setting up Classic WorkCenters because you use the same pages in Enterprise Components. However, Dashboards can display pivot grids that can also appear on a user's Home page.

Pivots grids are based on PSQueries and can display the results in a grid format, a chart format, or both. You use the Pivot Grid Wizard (**Reporting Tools**, and then **Pivot Grid**, and then **Pivot Grid Wizard**) to design how the page will appear to the user.

Pivot Grids can be added as pagelets (on a user's Home page or in a Dashboard), to the Queries tab in a Classic WorkCenter, and more.

For more information about WorkCenters, see the documentation for Enterprise Components: Understanding WorkCenters and Dashboards.

For more information about setting up pivot grids, see *PeopleTools: Pivot Grid*

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Understanding the Resource WorkCenter - My Work

Example of Pages Used in the Resource WorkCenter - My Work

Page Name	Definition Name	Usage
Unfulfilled Open Service Order Lines Page	RS_SO_LINE_OPEN_WC	Displays all Service Order Lines in the *Open* status for a logged in user.
Resource Near-Term Assignment Completion Page	RS_RES_ASSGN_WC	Displays the list of all the Resources whose Assignments are coming to an end in the near-term future.
Unassigned Resources Page	RS_WC_ASSN_EXP1	Displays all active Resources without an assignment.
SOs with Inactive Coordinator Page	RS_WC_SO_EXCEP1	Displays the list of active Service Orders that are assigned to **Inactive** or **Terminated** supervisors.
Resources with Inactive Supervisor Page	RS_WC_EMP_EXP1	Display the list of active Resources whose Supervisor is **Inactive** or **Terminated**.
Approve New Assignment(s) Page	WORKLIST	Displays the lists of all new Assignments which are awaiting users' actions.
Approve Date Change(s) Page	WORKLIST	Displays the list of all Assignments which have a new date added or changed, and awaiting users' actions.

Resource WorkCenter - My Work

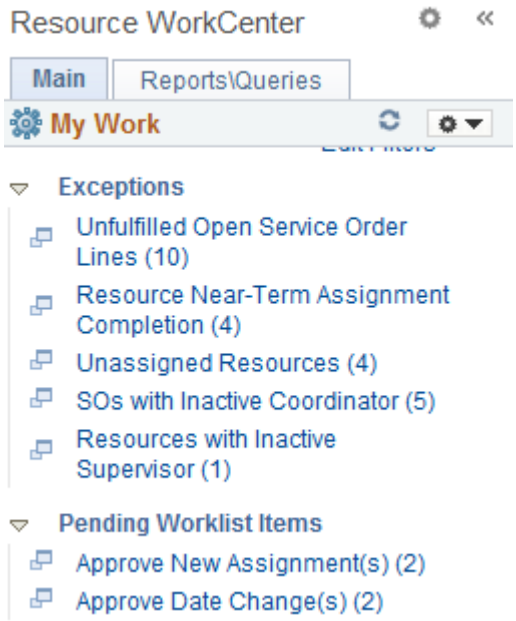
Use the Resource WorkCenter – My Work links to access process exception pages.

Navigation:

Resource Management, and then **Resource WorkCenter**

This example illustrates the fields and controls on the Resource WorkCenter - My Work.

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In this example, the My Work section has one group called Exceptions and contains links for these Service Order exceptions:

- Unfulfilled Open Service Order Lines
- Resource Near-Term Assignment Completion
- Unassigned Resources
- SOs (Service Orders) with Inactive Coordinator
- Resources with Inactive Supervisor

Another group in the My Work section is called Pending Worklist Items and contains links for these Worklist Assignment Exceptions:

- Approve New Assignment(s)
- Approve Date Change(s)

Unfulfilled Open Service Order Lines Page

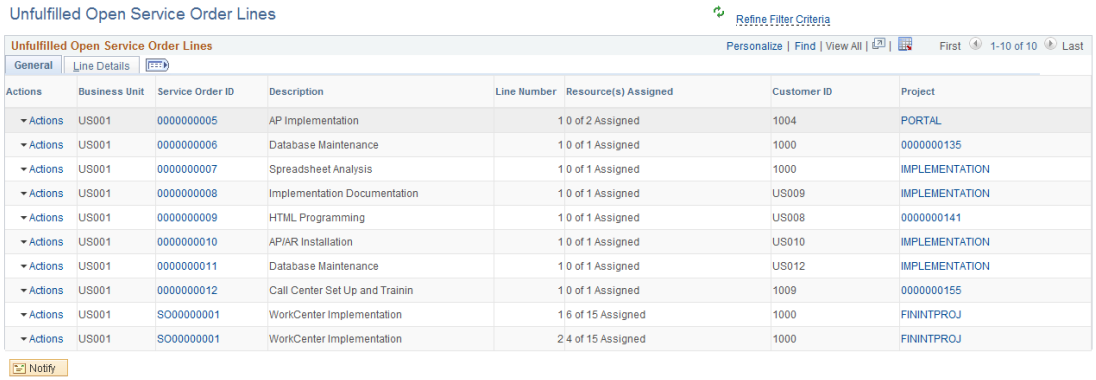
Use the Unfulfilled Open Service Order Lines (RS_SO_LINE_OPEN_WC) page to display all Service Orders Line in *Open* status for a logged on user.

Navigation:

Resource Management, and then **Resource WorkCenter**, and then **Unfulfilled Open Service Order Lines**

This example illustrates the fields and controls on the Unfulfilled Open Service Order Lines page.

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Click the **Actions** arrow button to execute the following actions on the exceptions:

Field or Control	Description
View Assignments	The **View Assignments** action is available only when there is an Assignment created for a Service Order line. When you click **View Assignments** , a bar graph displays that gives you a count of Assignments and its status. Click the bar graph, and then click **Detailed View** to view details of the Assignment in a grid. From the grid, you can further drill down to view the details of the Assignment. The following actions are available in the grid: • **Review Resource Profile**: Click the **Review Resource Profile** action to review a Resource's profile. • **View Resource Assignment**: Click the **View Resource Assignment** action to open the Resource Assignment created for the particular Open Service Order line.
Fulfill Service Order Line	The **Fulfill Service order Line** action launches the fulfill order page displaying the Service Order Line.

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Field or Control	Description
View Bid\Recommend Resources	The **View Bid\Recommend Resources** action opens a new page with the list of Resources who are either Recommended or have Bid on the Service order Line. The page displays the Resource name along with its Availability score based on the Service Order Line dates. The page has its own set of actions associated with it which helps the user to take some specific action on each of the Resources displayed on the page. These actions are : • **Review Work History**: The **Review Work History** action opens the Resource Work History page with the list of work experiences associated with the Resource. • **Create Assignment**: The **Create Assignment** action creates an Assignment for the Resource for a Service Order Line. If the Assignment is created successfully, an Assignment number is displayed along with the new **View Assignment** action. • **View Assignment**: The **View Assignment** action is visible only if an Assignment has been successfully created for the Bid\Recommended Resource for the Service Order Line using the **Create Assignment** action. The **View Assignment** action displays the newly created Assignment.

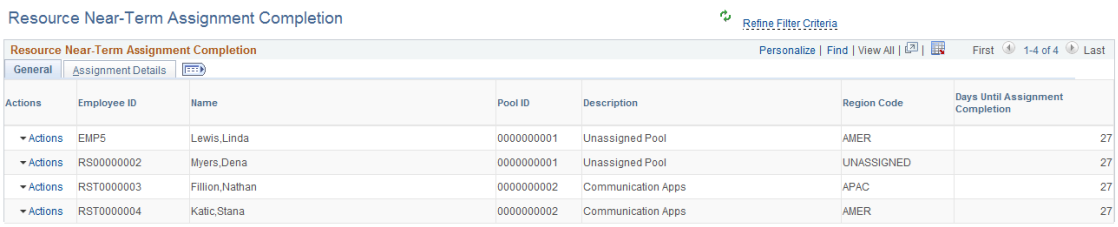
Resource Near-Term Assignment Completion Page

Use the Resource Near-Term Assignment Completion (RS_RES_ASSGN_WC) page to display list of all the Resources whose Assignments are coming to an end in the near-term future.

Navigation:

Resource Management, and then **Resource WorkCenter**, and then **Resource Near-Term Assignment Completion**

This example illustrates the fields and controls on the Resource Near-Term Assignment Completion page.



The **Resource Near-Term Assignment Completion** exception displays only those Resources for whom the logged-in user is assigned as “Supervisor” in the Update Employee Data page (PS_JOB). You following actions can be exercised for this exception:

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Field or Control	Description
Review Resource Work History	The **Review Resource Work History** action opens the Resource Work History page displaying the list of all work experiences of the Resource.
Review Resource Profile	The **Review Resource Profile** action opens the Resource Profile page giving details about the Resource. You can use this page to review consolidated resource profile information in a resumé format.
Create Resource Appointment	The **Create Resource Appointment** action opens the Create Appointment page. You can use the Create Appointment page to create Appointments for the Resource.
Manage Resource Utilization	**Manage Resource Utilization** action launches the Manage Utilization page giving full details of the Resource. You can use the Manage Utilization page to view key resource statistics and the resource's current assignment status.

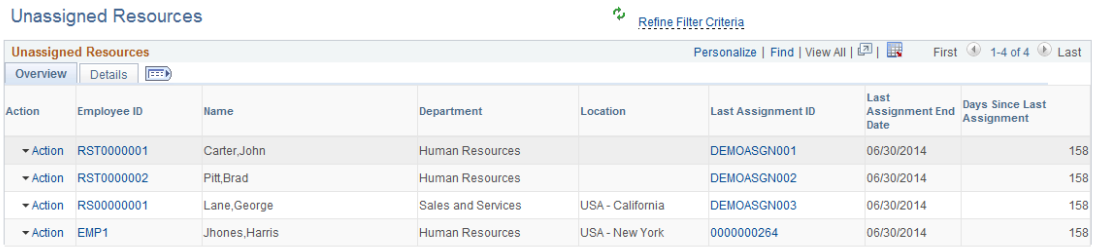
Unassigned Resources Page

Use the Unassigned Resources (RS_WC_ASSN_EXP1) page to display all active Resources without an assignment.

Navigation:

Resource Management, and then **Resource WorkCenter**, and then **Unassigned Resources**

This example illustrates the fields and controls on the Unassigned Resources page.



The **Unassigned Resources** exception displays the last assignment and the end date of the last assignment for the Resource. The following actions for available for this exception:

Field or Control	Description
Review Resource Work History	The **Review Resource Work History** action opens the Resource Work History page displaying the list of all work experiences of the Resource .

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Field or Control	Description
Review Resource Profile	The **Review Resource Profile** action opens the Resource Profile page giving details about the Resource. You can use this page to review consolidated resource profile information.
Create Resource Appointment	The **Create Resource Appointment** action opens the Create Appointment page. You can use the Create Appointment page to create Appointments for the Resource.
Manage Resource Utilization	**Manage Resource Utilization** action launches the Manage Utilization page giving full details of the Resource. You can use the Manage Utilization page to view key resource statistics and the resource's current assignment status.

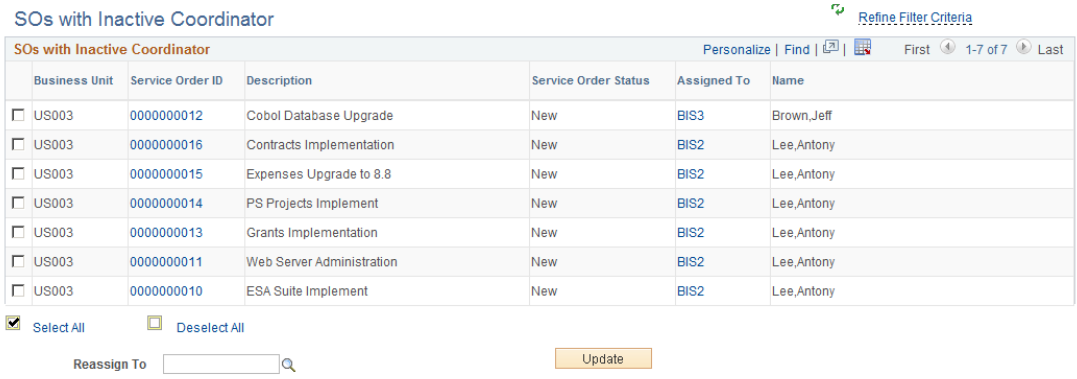
SOs with Inactive Coordinator Page

Use the SOs with Inactive Coordinator (RS_WC_SO_EXCEP1) page to display the list of active Service Orders that are assigned to **Inactive** or **Terminated** Supervisors.

Navigation:

Resource Management, and then **Resource WorkCenter**, and then **SOs with Inactive Coordinator**

This example illustrates the fields and controls on the SOs with Inactive Coordinator page.



The check boxes on the grid enable the users to select a row in grid and perform necessary actions. User can choose any of the Resources using the Look up icon (Lookup icon displays only the Active Resources), and then click the **Update** button so that the selected Service Orders will be re-assigned to the New Supervisor. Use the **Reassign To** look up icon to update the Supervisor.

After you click the **Update** button, the message “Selected Service Orders will be Reassigned to the new Supervisor. Do you want to Update the Supervisor of Assignment associated with the selected Service Orders” display”. If you select *Yes*, the Supervisor of the Assignment associated with that Service Order will be updated. If the selected row is updated successfully, then that row is removed from grid.

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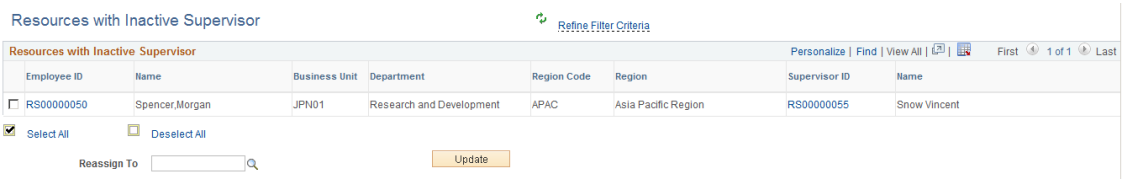
Resources with Inactive Supervisor Page

Use the Resources with Inactive Supervisor (RS_WC_EMP_EXP1) page to display the list of active Resources whose Supervisor is **Inactive** or **Terminated**.

Navigation:

Resource Management, and then **Resource WorkCenter**, and then **Resources with Inactive Supervisor**

This example illustrates the fields and controls on the Resources with Inactive Supervisor page.



The check boxes on the grid enable the users select to a row in grid and perform necessary actions. User can choose the Supervisor using the Look up icon (Lookup icon displays only Active Supervisors), and then click the **Update** button so that the selected Resources will be re-assigned to the New Supervisor. Use the **Reassign To** look up icon to update the Supervisor. If the selected row is updated successfully, then that row is removed from grid.

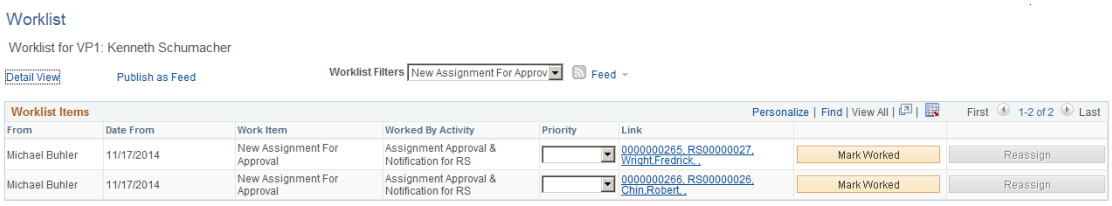
Approve New Assignment(s) Page

Use the Approve New Assignment(s) (WORKLIST) page to display the lists of all new Assignments which are awaiting users' actions.

Navigation:

Resource Management, and then **Resource WorkCenter**, and then **Approve New Assignment(s)**

This example illustrates the fields and controls on the Approve New Assignment(s) page.



Approve Date Change(s) Page

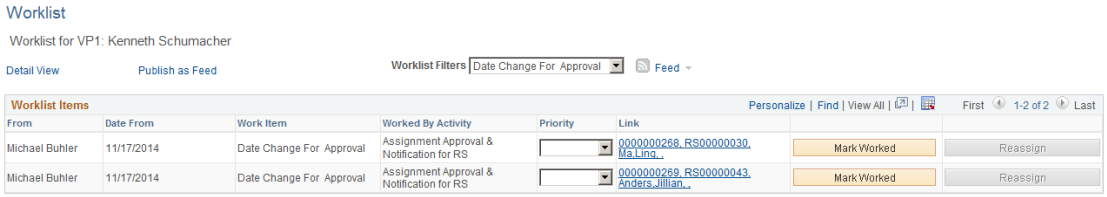
Use the Approve Date Change(s) (WORKLIST) page to display the list of all Assignments which have a new date added or changed, and awaiting users' actions.

Navigation:

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Resource Management, and then **Resource WorkCenter**, and then **Approve Date Change(s)**

This example illustrates the fields and controls on the Approve Date Change(s) page.

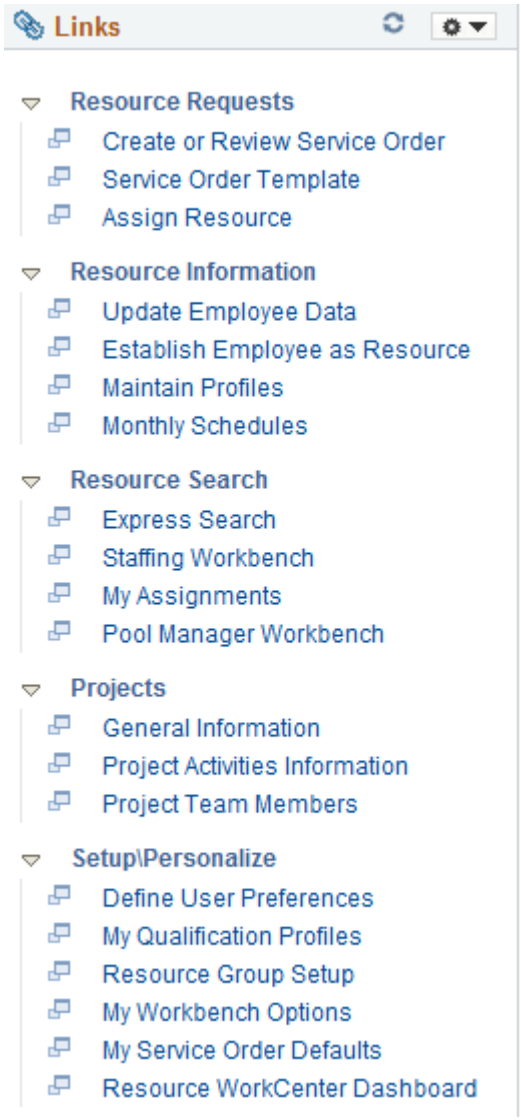


Understanding the Resource WorkCenter - Links

This page shot provides an example of how the Resource WorkCenter - Links section can be set up:

This example illustrates the fields and controls on the Resource Management WorkCenter - Links.

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The Links section provides access to internal and external links.

System administrators use the Enterprise Components: Configure Pagelets - Links Page to set up the WorkCenter - Links section for end users.

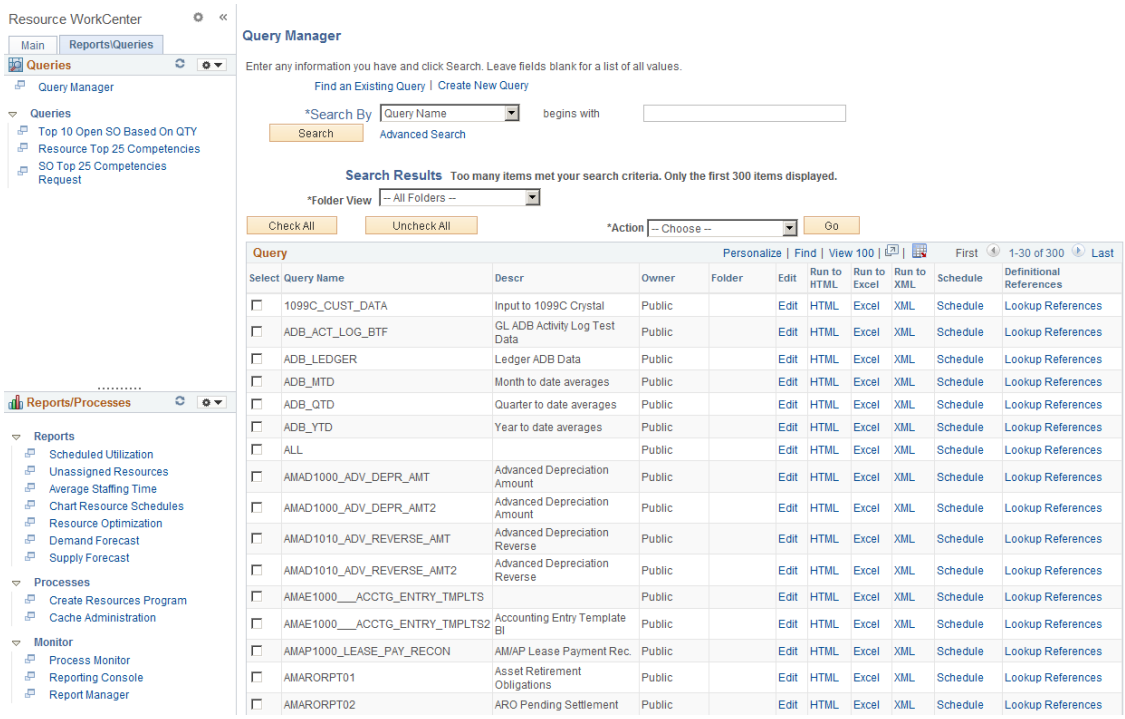
End users use the Application Fundamentals: Working With and Personalizing the Classic Links Pagelet As an End User to personalize the Links section for personal use.

Understanding the Resource WorkCenter - Queries Pagelet

The Query section of the Reports/Queries tab includes links to Query Manager, public queries, private queries and pivot grids. Click on any link in the query pagelet to display that query or pivot grid in the transaction area of the workcenter.

This example illustrates the fields and controls on the Queries pagelet.

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System administrators use the Enterprise Components: Configure Pagelets - Queries Pageto set up the WorkCenter Queries pagelet for end users.

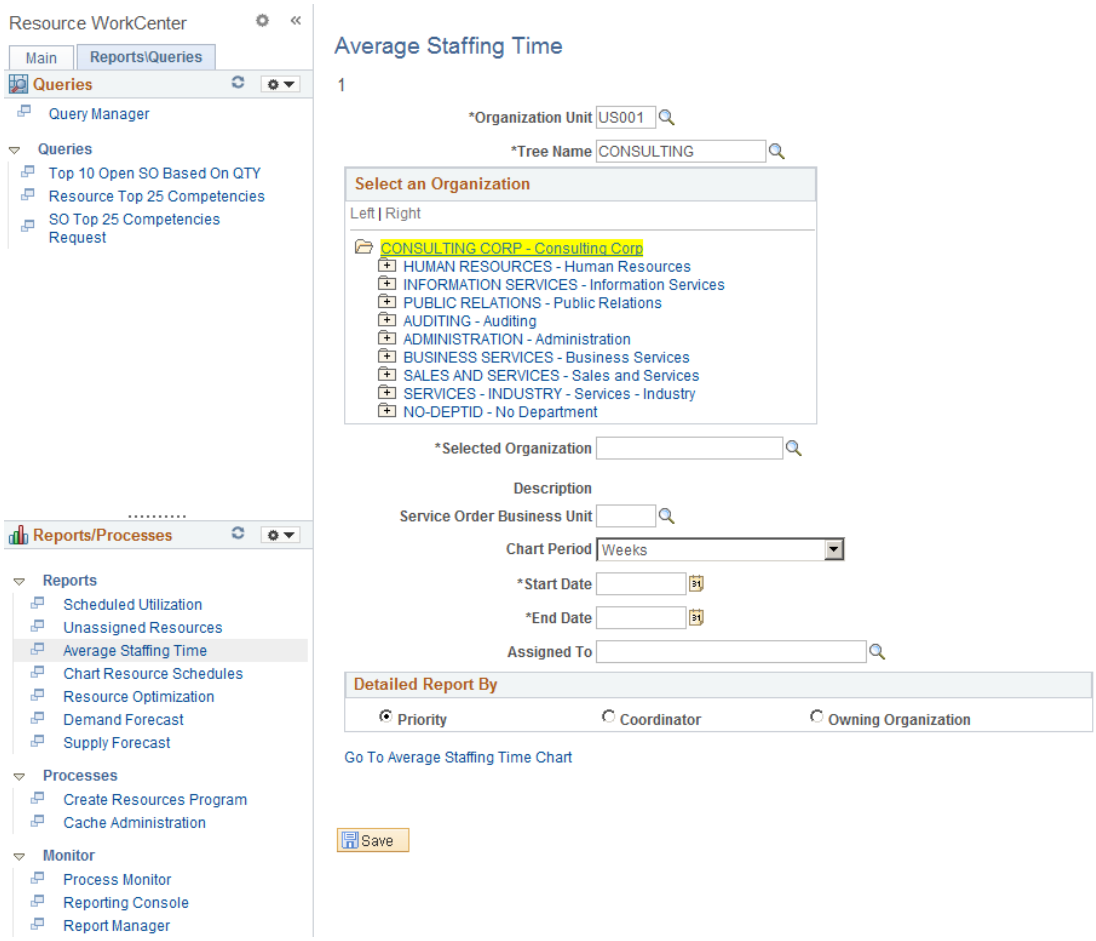
End users use the Application Fundamentals: Working With and Personalizing the Classic Queries Pagelet As an End User to personalize the Queries pagelet for personal use.

Understanding the Resource WorkCenter - Reports and Processes Pagelet

The Reports/Processes pagelet provides access to system defined reports and processes for which you have access.

This example illustrates the fields and controls on the Resource WorkCenter – Reports and Processes pagelet.

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System administrators use the Enterprise Components: Configure Pagelets - Reports/ Processes Page to set up the WorkCenter Reports/Processes pagelet for end users.

End users use the Application Fundamentals: Working With and Personalizing the Classic Reports and Processes Pagelet As an End User to personalize the Reports/Processes pagelet for personal use.

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32

Creating and Modifying PeopleSoft Resource Management Reports

Understanding PeopleSoft Resource Management Reports

PeopleSoft Resource Management provides *reports* and *interactive reports* that are specifically designed to assist you in analyzing and managing resource competencies, scheduling, and overall utilization. The distinction between the two terms is:

- Reports are batch processes that are managed through the PeopleSoft Process Scheduler.

  PeopleSoft Process Scheduler enables you to schedule the processes, select different output formats, and distribute the reports to other users.

- Interactive reports enable a user to quickly spot historical or future trends in resource data in a list or chart format.

  PeopleSoft Resource Management interactive reports provide information that is immediately visible on the application page—without the need for sending a process request to the Process Scheduler.

Establishing Report Parameters

This topic discusses how to establish parameters for reports that you generate from the Resource Management Interactive Reports.

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Pages Used to Establish Report Parameters

Page Name	Definition Name	Usage
Scheduled Utilization Page	RS_2020TUTR_PAR	Establish parameters for the Scheduled Utilization interactive report that you generate from the Resource Management Interactive Reports folder. The report compares scheduled utilization with optimal capacity for an organization unit, period of time, and utilization percentage that you define. Scheduled utilization evaluates resource schedules for the task categories that you want to be treated as utilized time. Optimal capacity evaluates resource standard hours from the Standard Hours field (STD_HOURS) on the Job record (JOB).
Unassigned Resources Page	RS_2030BENCH_PAR	Define the organization, period of time, and minimum percentage that determines when a worker is treated as assigned. You also select the task categories that the system uses to define utilized time. The report evaluates resources from the selected value for all human resource (HR) business units that share the Organizational Unit tree. This report lists resources who do not meet the threshold for determining that a worker is fully assigned.
Assignments Ending Page	RS_2040WRKRCOM_PAR	Establish parameters for the Assignments Ending interactive report that you generate from the Resource Management Interactive Reports folder. Use this report to review a summary list of resources with assignments ending during the date range and for the organizational unit that you specify on this page. The list provides employee names, employee IDs, and the end date of their last assignment. The list of resources can be downloaded to an Excel or other spreadsheet program.

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Page Name	Definition Name	Usage
Most Requested Competencies & Accomplishments Page	RS_2100COMP_RPT	Establish parameters for the Most Requested Competencies & Accomplishments interactive report that you generate from the Resource Management Interactive Reports folder.
Chart Resource Schedules Page	RS_2045WRKRSCH_PAR	Establish parameters for the Chart Resource Schedules interactive report that you generate from the Resource Management Interactive Reports folder. The Chart Resource Schedules interactive report displays a chart of resource schedules to help you quickly identify scheduled and available time. Select the organization, start date, period of time, number of resources, and tasks that appear in the chart.
Average Staffing Time Page	RS_2090AVST_PAR	Establish parameters for the Average Staffing Time interactive report that you generate from the Resource Management Interactive Reports folder. On the Average Staffing Time chart you can view the total number of service orders, average staffing time, and average number of requests. You can narrow or broaden the scope of the analysis by specifying parameters, and drill into details grouped by priority, staffing coordinator, or owning organization.
Assignments Listing Page	RS_2015ASSGNLS_RPT	Establish parameters for the Assignments Listing SQL report that you generate from the Resource Management Reports folder. Use the Assignments Listing report to review a list of all resources currently on assignment. Define the organization and period of time, and optionally define other information about the service order. The report is sorted by employee ID, customer name, and project ID.

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Page Name	Definition Name	Usage
Service Order Listing Report Page	RS_2000SOLIST_PAR	Establish parameters for the Service Order Listing SQL report that you generate from the Resource Management Reports folder. Review to whom service orders have been assigned for fulfillment and the state of your customer's projects, and track the progress of service orders as they move through your organization. You define the business unit, status, priority, and period of time to evaluate. You can optionally define additional details to focus the report on specific customers, projects, persons responsible for staffing service orders, or persons who created service orders.

Scheduled Utilization Page

Use the Scheduled Utilization page (RS_2020TUTR_PAR) to establish parameters for the Scheduled Utilization interactive report that you generate from the Resource Management Interactive Reports folder.

The report compares scheduled utilization with optimal capacity for an organization unit, period of time, and utilization percentage that you define. Scheduled utilization evaluates resource schedules for the task categories that you want to be treated as utilized time. Optimal capacity evaluates resource standard hours from the Standard Hours field (STD_HOURS) on the Job record (JOB).

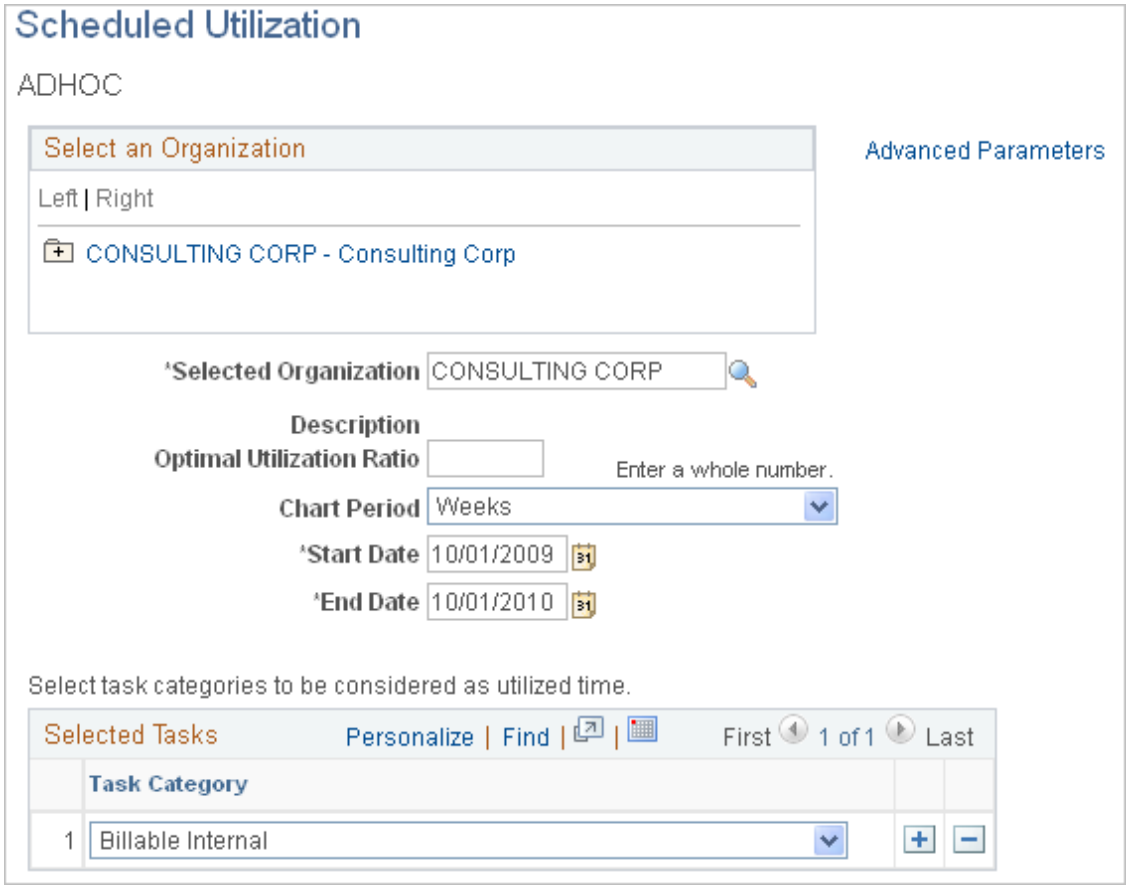
Navigation:

Resource Management, and then **Interactive Reports**, and then **Scheduled Utilization**, and then **Scheduled Utilization**

Click **Go To Report Parameters.** Click **Advanced Parameters** or **Basic Parameters.**

This example illustrates the fields and controls on the Scheduled Utilization page. You can find definitions for the fields and controls later on this page.

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Field or Control	Description
Select an Organization	This group box displays the Organizational Unit tree that you select in the **Tree Name** field. When you select an organizational unit to evaluate, the selection appears in the **Selected Organization** field. Expand the nodes to select a node or detail value from the tree. The report evaluates resources from the selected value for all HR business units that share the Organizational Unit tree.
Business Unit	Enter the HR business unit that is associated with the Organizational Unit tree from which you will select organizational units to include in the interactive report. The selection determines which tree appears in the **Select an Organization** group box. This field appears only in the Advanced Parameters view. The Basic Parameters view uses the HR business unit of the employee that is associated with the user who is logged into the system. If you change the **Business Unit** field value, click **Look Up Tree Name** to select the new Organizational Unit tree.

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Field or Control	Description
Tree Name	Enter the Organizational Unit tree name that is associated with the HR business unit. The Organizational Unit tree appears in the **Select an Organization** group box.
Selected Organization	The node name appears that you selected from the tree. You can enter a different node name.
Description	Displays the detail value description if you selected a detail value from the tree. If you did not select a detail value, the field is blank.
Optimal Utilization Ratio	Enter the percentage of a resource's total capacity that the resource must be scheduled on utilized tasks for the resource to be treated as optimally utilized on this interactive report. Enter a whole number, such as *85* for 85 percent.
Chart Period	Enter the periods for the report to segment the time between the start and end date. Available values are *Months, Quarters, Semiannual, Weeks,* or *Years.*
Start Date and **End Date**	Enter the start and end dates during which the system compares scheduled utilization with optimal capacity.
Selected Tasks	Enter the task categories to include in the definition of utilized time.
Advanced Parameters	Click this link to view and add business unit and tree name information. A **Basic Parameters** link appears here after you click the **Advanced Parameters** link.

Related Topics

- Reviewing Utilization Charts
  PeopleSoft Resource Management provides real-time analyses that you can view from the workbench to aid in managing utilization of resources. All of the views on this page contain the resources who appear in the active filter—all resources, unassigned resources, resources with ending assignments, or only selected resources. If you select a filter while the **Resources** scroll area is active and then you switch to a chart view, the same filter is used to display resources in the chart. If you view a chart view and select a new filter, then revert back to the **Resources** scroll area, the resources that belong to new filter appear in the scroll area.

Unassigned Resources Page

Use the Unassigned Resources page (RS_2030BENCH_PAR) to define the organization, period of time, and minimum percentage that determines when a worker is treated as assigned.

You also select the task categories that the system uses to define utilized time. The report evaluates resources from the selected value for all human resource (HR) business units that share the Organizational Unit tree. This report lists resources who do not meet the threshold for determining that a worker is fully assigned.

Navigation:

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Resource Management, and then **Interactive Reports**, and then **Unassigned Resources**, and then **Unassigned Resources**

Click **Go To Report Parameters.** Click **Advanced Parameters** or **Basic Parameters.**

Field or Control	Description
Minimum Percentage	Enter the minimum percentage of time that resources must be scheduled on utilized tasks for the resources to be treated as fully assigned on the Unassigned Resources interactive report. Enter a whole number, such as *85* for 85 percent.

The Unassigned Resources interactive report displays the percentages of resources who are assigned and unassigned. Click the assigned or unassigned portion of a bar to view a list of the assigned or unassigned resources, and the bill rate, percentage assigned, and assignment status for each resource. From the list you can access resource profiles, schedules, and assignments. Click the **Find Assignment** icon on a resource row to enter the Staffing Workbench - Manage Utilization page with the resource selected.

Related Topics

- Reviewing Utilization Charts
  PeopleSoft Resource Management provides real-time analyses that you can view from the workbench to aid in managing utilization of resources. All of the views on this page contain the resources who appear in the active filter—all resources, unassigned resources, resources with ending assignments, or only selected resources. If you select a filter while the **Resources** scroll area is active and then you switch to a chart view, the same filter is used to display resources in the chart. If you view a chart view and select a new filter, then revert back to the **Resources** scroll area, the resources that belong to new filter appear in the scroll area.

Assignments Ending Page

Use the Assignments Ending page (RS_2040WRKRCOM_PAR) to establish parameters for the Assignments Ending interactive report that you generate from the Resource Management Interactive Reports folder.

Use this report to review a summary list of resources with assignments ending during the date range and for the organizational unit that you specify on this page. The list provides employee names, employee IDs, and the end date of their last assignment. The list of resources can be downloaded to an Excel or other spreadsheet program.

Navigation:

Resource Management, and then **Interactive Reports**, and then **Assignments Ending**, and then **Assignments Ending**

Click **Go To Report Parameters.** Click **Advanced Parameters** or **Basic Parameters.**

On the Assignments Ending report, click a resource name to review the resource's specialties, if the resource profile contains specialties, and to review a chart of the resource's schedule for the next four weeks. Task categories and corresponding chart colors that appear on the Resource Schedules chart are specified during implementation on the Installation Options - Resource Management page. Click **Next Period** or **Previous Period** to review the next or previous four weeks on the schedule.

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Most Requested Competencies & Accomplishments Page

Use the Most Requested Competencies & Accomplishments page (RS_2100COMP_RPT) to establish parameters for the Most Requested Competencies & Accomplishments interactive report that you generate from the Resource Management Interactive Reports folder.

Navigation:

Resource Management, and then **Interactive Reports**, and then **Most Requested Competencies**, and then **Most Requested Competencies & Accomplishments**

The pie charts on the Most Requested Competencies & Accomplishments report display the most frequently requested competencies and accomplishments as determined by the frequency of occurrence on resource requests. You select the maximum number of results to appear on the report, reporting period, and service order business unit to evaluate. A competency or accomplishment pie chart appears only if a competency or accomplishment was requested during the specified period time for the business unit.

Move the mouse pointer across a pie chart section to view alternate text about the number of requests for a competency or accomplishment.

Click a pie chart to access a list of the most requested competencies and accomplishments in separate grids in descending order based on the number of requests.

You must enter a value for the number of results, start date, and service business unit.

Chart Resource Schedules Page

Use the Chart Resource Schedules page (RS_2045WRKRSCH_PAR) to establish parameters for the Chart Resource Schedules interactive report that you generate from the Resource Management Interactive Reports folder.

The Chart Resource Schedules interactive report displays a chart of resource schedules to help you quickly identify scheduled and available time. Select the organization, start date, period of time, number of resources, and tasks that appear in the chart.

Navigation:

Resource Management, and then **Interactive Reports**, and then **Chart Resource Schedules**, and then **Chart Resource Schedules**

Click **Go To Report Parameters.** Click **Advanced Parameters** or **Basic Parameters.**

On the Chart Resource Schedules report, click **First Item, Previous Item, Next Item,** or **Last Item** to scroll through the list of resources. Click **Next Period** or **Previous Period** to view schedules from other time periods. Move the mouse pointer across an assignment task to view alternate text about the assignment description and customer name. Move the mouse pointer across an appointment task to view alternate text about the appointment description.

Field or Control	Description
Chart Period	Enter the time intervals to appear on the report. The default value is *Weeks.*
Maximum Number of Resources Displayed	Enter the maximum number of resources to group together in your chart. A bar appears in the report for each resource in groups the size that you indicate in this field. The default value is *5.*

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Field or Control	Description
Task Category	Enter the task categories to appear on the chart.
Task Chart Color	Enter a color to designate each task category that will appear on the chart.

Related Topics

- Reviewing Utilization Charts
  PeopleSoft Resource Management provides real-time analyses that you can view from the workbench to aid in managing utilization of resources. All of the views on this page contain the resources who appear in the active filter—all resources, unassigned resources, resources with ending assignments, or only selected resources. If you select a filter while the **Resources** scroll area is active and then you switch to a chart view, the same filter is used to display resources in the chart. If you view a chart view and select a new filter, then revert back to the **Resources** scroll area, the resources that belong to new filter appear in the scroll area.

Average Staffing Time Page

Use the Average Staffing Time page (RS_2090AVST_PAR) to establish parameters for the Average Staffing Time interactive report that you generate from the Resource Management Interactive Reports folder.

On the Average Staffing Time chart you can view the total number of service orders, average staffing time, and average number of requests. You can narrow or broaden the scope of the analysis by specifying parameters, and drill into details grouped by priority, staffing coordinator, or owning organization.

Navigation:

Resource Management, and then **Interactive Reports**, and then **Average Staffing Time**, and then **Average Staffing Time**

Click **Go To Report Parameters.**

Staffing time is the number of days from the date the service order was submitted for fulfillment (placed in a status of *New*) to the date the order was fulfilled (placed in a status of *Closed*). If a service order has more than one occurrence in a status of *New,* only the first occurrence is included in the calculation.

Field or Control	Description
Assigned To	Specify a person responsible for staffing service orders to include in this interactive report. Leave the field blank to evaluate all persons responsible for staffing orders within the parameters that you specify on this page.
Priority, Coordinator, or **Owning Organization**	Select to view the total number of service orders, average staffing time, and average number of requests broken out by **Priority,** (Staffing) **Coordinator,** or **Owning Organization.**

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Assignments Listing Page

Use the Assignments Listing page (RS_2015ASSGNLS_RPT) to establish parameters for the Assignments Listing SQL report that you generate from the Resource Management Reports folder.

Use the Assignments Listing report to review a list of all resources currently on assignment. Define the organization and period of time, and optionally define other information about the service order. The report is sorted by employee ID, customer name, and project ID.

Navigation:

Resource Management, and then **Reports**, and then **Assignments Listing Report**

Field or Control	Description
Service Order Business Unit	Enter the project business unit that determines the list of service orders to evaluate. Leave the field blank to include all service orders. You must enter a project business unit to select a project or customer to evaluate.
Project	Enter the project to evaluate in this report. Leave the field blank to include all projects.
Customer	Enter the customer to evaluate in this interactive report. Leave the field blank to include all customers.
Customer Name	Displays the customer name associated with the customer ID.

Service Order Listing Report Page

Use the Service Order Listing Report page (RS_2000SOLIST_PAR) to establish parameters for the Service Order Listing SQL report that you generate from the Resource Management Reports folder.

Review to whom service orders have been assigned for fulfillment and the state of your customer's projects, and track the progress of service orders as they move through your organization. You define the business unit, status, priority, and period of time to evaluate. You can optionally define additional details to focus the report on specific customers, projects, persons responsible for staffing service orders, or persons who created service orders.

Navigation:

Resource Management, and then **Reports**, and then **Service Order Listing**, and then **Service Order Listing Report**

Field or Control	Description
Assigned To	Enter the name of the person responsible for staffing the service orders that you want to include in the report.
Entered by	Enter the name of the person who entered the service orders that you want to include in the report.

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Field or Control	Description
Show Resource Request Detail	Select this option if you want the report to include resource request details, such as the quantity of resources requested, request start date, end date, days of work, request status, and more.
Service Order Status	Enter the service order statuses to include on the report.
Priority Code	Enter the service order priority codes to include on the report.

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Delivered Workflows for PeopleSoft Resource Management

Delivered Workflows for PeopleSoft Resource Management

This section discusses PeopleSoft Resource Management workflows. The workflows are listed alphabetically by workflow name.

Appointment Schedule Notification

This section discusses Appointment Schedule Notification workflow.

Description

Information Type	Description
Event Description	The following event triggers Appointment Schedule Notification workflow: Save a new or modified appointment task on the Appointment Details page in the Appointment Schedule component (RS_SCHED_APPT).
Action Description	If a resource adds or modifies an appointment task, the resource manager, as defined on the Job record (JOB), appears as the addressee on the Notification Message page. Enter comments about the appointment, and click **OK** to send the email to the resource manager. If a manager, or anyone with access to the Monthly Schedule page, adds or modifies a resource's appointment task, the resource appears as the addressee on the Notification Message page. Enter comments about the appointment, and click **OK** to send the email to the resource.
Notification Method	Email

> **Note**
>
> Appointment Schedule Notification workflow options are activated on the Installation Options - Resource Management page.

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Workflow Objects

Information Type	Description
Business Process	Resource Appointment Schedule (RS_SCHED_TASK)
Activity	Appointment Schedule Notification (RS_SCHED_NOTIFY)

Related Topics

- Understanding Resource Schedule Maintenance
  Resource schedule maintenance is an essential part of effectively managing resources in PeopleSoft Resource Management. Resource Management uses the resource schedule to interactively manage a resource's scheduled tasks and availability. Resource Matching uses schedule data to calculate the availability of a qualified resource and compare it to the dates specified on a resource request.

Assignment Approval

This section discusses Assignment Approval workflow.

Description

Information Type	Description
Event Description	The following events trigger Assignment Approval workflow: Save a new assignment with a status of *Assigned*. Modify an assignment date for an assignment that is in an *Assigned* status. Modify the assignment status of an existing assignment from any status to *Assigned*. Reject an assignment. Modify an assignment status to any status that is specified on the Assignments eMail Notification Options page for triggering email notifications to the resource, resource manager, and project manager.

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Information Type	Description
Action Description	Saving a new assignment with a status of *Assigned* triggers a worklist item to the manager of the resource—either the resource's supervisor (as defined on the Job record) or the resource's pool manager, to approve the assignment. **Note:** The pool manager is determined by first identifying to which pool a resource belongs (through the RS_POOL_MEMBER record), and then identifying the manager of the pool (through the RS_RES_POOL record). You select either the supervisor or pool manager as the resource manager in the **Resource Manager Options** group box on the Resource Management Options page. Saving a new assignment with a status of *Assigned* triggers workflow to the project manager for the project. Modifying a date for an assignment in an *Assigned* status triggers a worklist item to the resource's manager and project manager to approve the assignment date change. Modifying the status of an assignment from any status to *Assigned* triggers a worklist item to the resource's manager and project manager to approve the assignment status change. Modifying an assignment date or status triggers an email notification to the resource's manager, the resource, and the project manager. Rejecting an assignment triggers an email notification to the resource and the project manager.
Notification Method	New assignments, date changes, or status changes that require approval are sent to the worklist. Notifications to the resource's manager, resource, and project manager of assignment date and status changes are sent through email.

Note

A worklist item or email notification is not sent to the user who changes the assignment. For example, a worklist item is not sent to the resource's manager to approve a new assignment if the resource's manager is the person who submitted the assignment.

Assignment Approval workflow options are activated on the Resource Management Options page.

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> **Important**
>
> For all resources, you must enter a supervisor on the Update Employee Data - Employee Job page before you can use workflow to send assignments for approval or notification to the resource manager. This applies if select the supervisor as the resource manager.

Workflow Objects

Information Type	Description
Business Process	Assignment Approval (RS_ASSGN_APPROVAL)
Activity	Assignment Approval (RS_ASSGN_APPROVAL)

Related Topics

- Understanding Resource Assignments in PeopleSoft Resource Management
  The assignment process pairs a resource with a unit of work. Assignments interact with the other key data components—resource profiles, resource schedules, and service orders—that support the staffing process. When you create an assignment and process it through various states, PeopleSoft Resource Management creates a new resource schedule entry or updates an existing entry. When you assign a resource to a project or a resource completes the assignment, PeopleSoft Resource Management updates the resource profile with work experience information. When you select a resource to fulfill a resource request on a service order, an assignment is created and can be viewed from the service order to reflect service order fulfillment progress. Once the number of resources assigned equals the quantity of resources requested for an order, the service order is closed.
- Understanding Service Order Fulfillment Using the Staffing Workbench
  You can use the Staffing Workbench - Fulfill Orders page to manage the entire service order fulfillment process. Here you can review the current queue of orders that are assigned to you for fulfillment, identify those orders that require your attention, and perform a variety of tasks to find qualified resources to fulfill them. On the Fulfill Orders page, you can:
- Understanding Resource Utilization Using the Staffing Workbench
  One of the primary responsibilities of a resource manager is to make sure that the resources are effectively utilized. Managing utilization is difficult, and it requires that you know the assignment status, skills, availability, and interests of resources. PeopleSoft Resource Management enables you to effectively manage resource utilization on the Staffing Workbench. The workbench that staffing coordinators use to manage service order fulfillment can also be used by resource managers to fully utilize resources. This common workbench is convenient for practice managers, who are ultimately responsible for both staffing and resource utilization.
- Understanding the My Assignments Feature
  Other topics in this documentation discuss workbenches that are designed primarily for staffing coordinators, resource managers, practice managers, or pool managers to fulfill customer requests and manage resource utilization. As a resource, you also have a uniquely designed workbench containing the tools that you need to review existing assignments and seek new ones.

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Competency Change Notification

This section discusses Competency Change Notification workflow.

Description

Information Type	Description
Event Description	The following event triggers Competency Change Notification workflow: Modify a competency on a resource profile.
Action Description	The system sends an email notification to the resource manager (as defined in the Job record) that competencies are updated on the resource profile.
Notification Method	Email

> **Note**
>
> This workflow applies only if you use the PeopleSoft Financials database as the employee source database for the resource.
>
> Competency Change Notification workflow is activated on the Resource Setup - Common Installation Options page.

Workflow Objects

Information Type	Description
Business Process	Resource Competencies (UPDATE_COMP_EMAIL)
Activity	Competency Change Notification (EMAIL_SUPERVISOR)

Related Topics

- Understanding Resource Profile Maintenance
  The resource profile captures an inventory of a resource's qualifications and preferences to calculate the resource's fit scores. The profile also provides general employee data, such as contact information, weekly work days, or assignment restrictions.

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Contract Administrator Notification

This section discusses Contract Administrator Notification workflow.

Description

Information Type	Description
Event Description	The following event triggers Contract Administrator Notification workflow: Click the **Notify Contracts Administrator** link on the Notify Contract Administrator page to send an email to the contract administrator.
Action Description	Contract administrators that are defined as support team managers in PeopleSoft Contracts appear on the Notify Contract Administrator page for you to select a contract administrator and enter comments about an assignment. Save the assignment to send the email.
Notification Method	Email

> **Note**
>
> This workflow is automatically activated.

Workflow Objects

Information Type	Description
Business Process	Contract Administrator (RS_NOTIFY_CNTRCT_ADMIN)
Activity	Contract Administrator Notification (RS_NOTIFY_CNTRCT_ADMIN)

Related Topics

- Assigning Resources
  This topic discusses how to assign resources.

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Generic Resource Request

This section discusses workflow for generic resource requests.

Description

Information Type	Description
Event Description	The following event triggers generic resource request workflow: Select a resource status of *Requested* for a generic resource on the Resources page in PeopleSoft Program Management. Modify the schedule dates for a generic resource that is in *Allocated* status on the Resources page in PeopleSoft Program Management. Modify a generic resource request status to any status that is specified on the Generic Resource eMail Notification Options page for triggering email notifications to the pool manager and project manager.
Action Description	Requesting a generic resource on the Resources page in PeopleSoft Program Management triggers a generic resource request to the Pool Manager Workbench for the pool manager to approve and fulfill the request. Modifying the schedule dates for a generic resource that is in an *Allocated* status on the Resources page in PeopleSoft Program Management triggers a worklist item to the pool manager. Modifying the schedule dates or status for a generic resource that is in an *Allocated* status on the Resources page in PeopleSoft Program Management triggers an email notification to the pool manager and project manager.
Notification Method	New generic resource requests, date changes, or status changes that require approval are sent to the worklist. Notifications to the pool manager and project manager of generic resource request date and status changes are sent through email.

> **Note**
>
> Generic Resource Request workflow is activated on the Resource Management Options page.

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Workflow Objects

Information Type	Description
Business Process	Generic Resource Request Approval (RS_GRR_APPROVAL)
Activity	Generic Resource Approval (RS_GRR_APPROVAL)

Recommendation Notification

This section discusses Recommendation Notification workflow.

Description

Information Type	Description
Event Description	The following event triggers Recommendation Notification workflow: Recommend a resource for a resource request on the Service Order - Recommend Resources page and save the service order. Select an action of *Recommend* for a resource-and-resource request combination on the Staffing Workbench - Manage Utilization page and save the workbench.
Action Description	The system sends a worklist item to the resource as a notification that the resource is recommended for a resource request.
Notification Method	Worklist

> **Note**
>
> This workflow is automatically activated.

Workflow Objects

Information Type	Description
Business Process	My Assignments (RS_RESOURCE_DSHBRD)
Activity	Recommendation Notification (RS_MYRECS_CHANGE)

Related Topics

- Understanding Service Orders
  In PeopleSoft Resource Management, you can request services for a customer by using a service order. The service order form captures information about the engagement and includes one or more resource requests. The resource request section of a service order captures data that is needed to find qualified resources to work on the engagement. Each resource request can have a unique set of skill and date requirements. You can request multiple resources on a single resource request, provided that the same requirements

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apply for each. Resource Matching uses the specifications in the service order and resource request to search for available, qualified resources.

Resource Assignment Notification

This section discusses Resource Assignment Notification workflow.

Description

Information Type	Description
Event Description	The following events trigger Resource Assignment Notification workflow: Create a new assignment with a status of *Assigned*. Modify a date for an assignment in an *Assigned* status. Modify the status of an existing assignment from any status to *Assigned*.
Action Description	Creating a new assignment, modifying an assignment status, or modifying an assignment date triggers a worklist item to the resource.
Notification Method	Worklist

> **Note**
>
> This workflow is automatically activated.

Workflow Objects

Information Type	Description
Business Process	My Assignments (RS_RESOURCE_DSHBRD)
Activity	Resource Assignment Notification (RS_MYASSGN_CHANGE)

Related Topics

- Assigning Resources
  This topic discusses how to assign resources.
- Understanding Service Order Fulfillment Using the Staffing Workbench
  You can use the Staffing Workbench - Fulfill Orders page to manage the entire service order fulfillment process. Here you can review the current queue of orders that are assigned to you for fulfillment, identify those orders that require your attention, and perform a variety of tasks to find qualified resources to fulfill them. On the Fulfill Orders page, you can:
- Managing Resource Utilization
  This topic discusses how to manage resource utilization.
- Understanding the My Assignments Feature
  Other topics in this documentation discuss workbenches that are designed primarily for staffing coordinators, resource managers, practice managers, or pool managers to fulfill

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customer requests and manage resource utilization. As a resource, you also have a uniquely designed workbench containing the tools that you need to review existing assignments and seek new ones.

Service Order Notification

This section discusses Service Order Notification workflow.

Description

Information Type	Description
Event Description	The following events trigger Service Order Notification workflow: Submit a new service order. Modify the person responsible for staffing a service order. Modify the status of a service order. Modify the status of a resource request. Click the **E-Mail Partner** link on the Order Summary page to send an email to a partner or any email addressee.
Action Description	Submitting a new service order triggers a worklist item to the person responsible for staffing the service order. Changing the responsible for staffing person on a service order triggers a worklist item to the new user who is responsible for staffing the order. Modifying the status of a service order triggers an email notification to the user who is responsible for staffing the service order, and to each of the users who are listed as interested parties on the service order. Modifying the status of a resource request triggers an email notification to resources who were recommended for the resource request, or who submitted a bid for the resource request. Clicking the **E-Mail Partner** link on the Order Summary page accesses the E-Mail Partner page for you to enter an email address. Click OK to send the email message containing information about the service order and all of the resource requests included in the order.

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Information Type	Description
Notification Method	New service orders ready for staffing, or existing service orders with a change in the person responsible for staffing the order, are sent to the worklist. Notifications of a service order status change to the user who is responsible for staffing the service order, and to each of the users who are listed as interested parties on the service order, are sent through email. Notifications of a resource request status change to resources who received a recommendation, or bid on the request, are sent through email. Messages to a partner or other email addressee are sent through email.

> **Note**
>
> Service Order Notification workflow options are activated on the Resource Management Options page. Workflow to send an email message to a partner or other email addressee is automatically activated.

Workflow Objects

Information Type	Description
Business Process	Service Order (RS_SERVICE_ORDER)
Activity	Service Order Notification (RS_SO_ENTER)

Related Topics

- Understanding Service Orders
  In PeopleSoft Resource Management, you can request services for a customer by using a service order. The service order form captures information about the engagement and includes one or more resource requests. The resource request section of a service order captures data that is needed to find qualified resources to work on the engagement. Each resource request can have a unique set of skill and date requirements. You can request multiple resources on a single resource request, provided that the same requirements apply for each. Resource Matching uses the specifications in the service order and resource request to search for available, qualified resources.

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Supervisor Notification

This section discusses Supervisor Notification workflow.

Description

Information Type	Description
Event Description	The following event triggers Supervisor Notification workflow: Click the **E-Mail Supervisor** icon button in the My Assignments component (RS_MYASSIGNMENTS) to send an email to your supervisor.
Action Description	The user's manager, as defined on the Job record, appears as the addressee on the Send E-Mail to <Supervisor> page. Enter comments about an assignment or resource request, and click **OK** to send the email.
Notification Method	Email

> **Note**
>
> This workflow is automatically activated.

Workflow Objects

Information Type	Description
Business Process	My Assignments (RS_RESOURCE_DSHBRD)
Activity	Supervisor Notification (RS_MYASSGN_EMAIL)

Related Topics

- Understanding the My Assignments Feature
  Other topics in this documentation discuss workbenches that are designed primarily for staffing coordinators, resource managers, practice managers, or pool managers to fulfill customer requests and manage resource utilization. As a resource, you also have a uniquely designed workbench containing the tools that you need to review existing assignments and seek new ones.

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PeopleSoft Resource Management Web Libraries

Understanding Web Libraries

A web library is a derived or work record whose name starts with WEBLIB_. PeopleSoft embeds all internet scripts (iScripts) in records of this type. An iScript is a specialized PeopleCode function that generates dynamic web content. Administrators must make sure that users have the proper access to web libraries. For example, the default navigation system for PeopleSoft Pure Internet Architecture users is implemented by using a web library. If users do not have the proper authorization to the web library and its associated scripts, then they won't have proper access to the system. If users are not authorized to a particular web library or iScript, then they can't invoke it. After you add a web library, you set the access for each script function individually. Invoking an iScript requires the assembly of a URL. Developers assemble the URL by using PeopleCode.

See the product documentation for *PeopleTools: PeopleCode API ReferencePeopleTools: Security Administration*

PeopleSoft Resource Management Web Libraries

This table lists web libraries that are used and delivered with PeopleSoft Resource Management:

Web Library Name	Description
WEBLIB_PORTAL	See *PeopleTools : Internet Technology*, "Appendix D: PeopleTools Web Libraries."
WEBLIB_RS	This handles Mass Pool import functionality, and contains iScripts for mass pool.
WEBLIB_RS_SCHD	This contains iScripts for and handles Calendar functionality requirements.

Refer to the *PeopleTools : Internet Technology* for a list of PeopleTools web libraries.

See *PeopleTools : Internet Technology,* "Appendix D: PeopleTools Web Libraries."

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PeopleSoft Resource Management Reports

PeopleSoft Resource Management Reports: A to Z

This table lists the PeopleSoft Resource Management reports and interactive reports, sorted alphanumerically by report ID. The reports are BI Publisher reports, and are designated with a PeopleSoft Process Scheduler run control page ID. The remaining items in the list are interactive reports that you can generate during a business process or from the Interactive Reports folder. Interactive reports are not scheduled through the PeopleSoft Process Scheduler.

Report ID and Report Name	Description	Navigation	Run Control Page
RS_2020TUTR_RPT Scheduled Utilization	Compare scheduled utilization with optimal capacity for a specified organization unit and period of time. This interactive report supports the business process of managing resources. See Reviewing Utilization Charts.	**Resource Management**, and then **Interactive Reports**, and then **Scheduled Utilization Report** Click **Generate Report.**	Not applicable
RS_2020TUTR_STAT Scheduled Utilization - Employee Statistics	View the resources in the Scheduled Utilization chart. This interactive report supports the business process of managing resources.	Click **Go To Resource List** in the Scheduled Utilization chart page.	Not applicable

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Report ID and Report Name	Description	Navigation	Run Control Page
RS_2030BENCH_RPT Unassigned Resources	Analyze resources who do not meet the threshold that you define for determining that a worker is assigned. This interactive report provides a chart and lists the unassigned and assigned resources in the organizational units represented by the tree node or detail value that you specify at run time. This interactive report supports the business process of assigning resources to projects. See Reviewing Utilization Charts.	**Resource Management**, and then **Interactive Reports**, and then **Unassigned Resources Report** Click **Generate Report.**	Not applicable
RS_2040WRKRCOM_DTL Assignments Ending (detail)	View information about a specific resource's specialties and schedule. This interactive report supports the business process of assigning resources to projects.	Select a resource name link on the Assignments Ending (summary) page.	Not applicable
RS_2040WRKRCOM_RPT Assignments Ending (list)	Analyze resources who might be available on a certain date with certain skills. View a list of resources who have assignments ending within a specified date range. This interactive report supports the business process of assigning resources to projects. See Staffing Workbench - Manage Utilization Page.	**Resource Management**, and then **Interactive Reports**, and then **Assignments Ending Report** Click **Generate Report.**	Not applicable
RS_2045WRKRSCH_RPT Chart Resource Schedules	Displays a chart of resource schedules so that you can quickly identify scheduled and available time. This interactive report supports the business process of assigning resources to projects. See Reviewing Utilization Charts.	**Resource Management**, and then **Interactive Reports**, and then **Chart Resource Schedules Rpt** Click **Generate Report.**	Not applicable

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Report ID and Report Name	Description	Navigation	Run Control Page
RS_2090AVST_RPT Average Staffing Time (chart)	View trends in staffing time by charting the average amount of time it takes to fulfill service orders in a specified period.	**Resource Management**, and then **Interactive Reports**, and then **Average Staffing Time Report** Click **Generate Report.**	Not applicable
RS_2090AVST_STATP Average Staffing Time (detail)	View the breakdown of the average staffing time by service order priority, staffing coordinator, or owning organization.	Click **Go To Average Staffing Time per <Priority, Coordinator, or Owning Organization>** on the Average Staffing Time chart page.	Not applicable
RS_2100COMP_DTL Most Requested Competencies & Accomplishments (detail)	Identifies the most requested competencies and accomplishments to assist you in the recruitment of resources who best meet your historical or future needs. View lists containing the most requested competencies and accomplishments in descending order by number of requests. This interactive report supports the business process of managing resources.	Click anywhere in the Most Requested Competencies chart or Most Requested Accomplishments chart.	Not applicable

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Report ID and Report Name	Description	Navigation	Run Control Page
RS_2100COMP_RPT Most Requested Competencies & Accomplishments (chart)	View charts containing the most requested competencies and accomplishments. Popularity is determined by the number of times that a particular competency or accomplishment appears on resource requests for a given business unit in a given time period. You can use this information to assist you in the recruitment of resources who best meet your historical needs. This interactive report supports the business process of managing resources.	**Resource Management**, and then **Interactive Reports**, and then **Most Requested Competency Rpt** Click **Generate Report.**	Not applicable
SRS2000 Service Order Listing	View a list of service orders by status and priority. This report supports the business process of assigning resources to projects.	**Resource Management**, and then **Reports**, and then **Service Order Listing Report** Click **Run** to run the report by using PeopleSoft Process Scheduler.	RS_2000SOLIST_PAR
SRS2015 Assignments Listing Report	View a list of resources currently on assignment. This report supports the business process of assigning resources to projects.	**Resource Management**, and then **Reports**, and then **Assignment Listing Report** Click **Run** to run the report using the PeopleSoft Process Scheduler.	RS_2015ASSGNLS_RPT

See the product documentation for *PeopleTools: Process Scheduler*

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