Resource Management in TD

This document assumes that you have entered all your Enterprise users in the system and gave the appropriate users TDNext, the Projects/Workspaces, and Portfolio Planning Applications.

Your TD Admin may need to configure the appropriate settings on the users for which you want to manage. Once set, they will not change, and moving forward, the capacity value will persist throughout the system. Once resources are scheduled, the capacity remains the same, but what is left over is what’s known as the availability. The availability number is what should be looked at to see how much room there is in that person’s or that Functional Role’s schedule.

By default, a User’s capacity is 8 hours per day, Monday – Friday, which would come out to 40 hours per week. This daily capacity may increase or decrease at the user level. Also, you can set a capacity span for use cases such as temporary employees, consultants, contractors, etc. Users can also be inserted into a Resource Pool.

Capacity

<table>
<thead>
<tr>
<th>Hourly Bill Rate</th>
<th>$0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily Capacity</td>
<td>8.00</td>
</tr>
</tbody>
</table>

This user’s capacity is managed.

Resource Management

<table>
<thead>
<tr>
<th>Reports To</th>
<th>Aaron Crane</th>
</tr>
</thead>
</table>

Resource Pool

4 Mindsets of Resource Management

There are four main ‘mindsets’ for trying to manage resources in TD, and depending on your need, you might choose different reports to gather that information to make a decision.

Paths 1 and 3 can be heavily affected by the use of Workspaces and Projects found inside the Projects/Workspaces Application, so those items will be defined first.

Workspaces

Workspaces are where you can account for known reductions in availability throughout the year. Workspaces can be a place for collaboration on project-esque work. Workspaces account for operational tasks such as maintenance on servers, routine tasks, and/or ticket work. After a user is added to a Workspace by the Workspace Manager, a User can have their schedule set on a workspace at the week or month level by the manager of the workspace. That User’s Resource Pool Manager can even set their schedule down to the day level inside the Resource Management Application (will be defined later). An example of why this could be useful is a User’s schedule at an academic institution might need to be set to 80% unavailable in August because of Students coming back to represent all the ticket work that needs to be completed, whereas that User’s schedule in June might be 90% open for project work.
since those students will probably be gone for the most part. In regards to Resource Management, Workspaces are where you can account for known reductions in availability throughout the year.

Each group around your institution might have their own workspace to share ideas, store documents, and discuss various items related to their areas. Time, Expenses, and Events can be tracked against Workspaces.

Users can be added to a desktop by the manager on the Members tab.

Users can have their schedule set on a Workspace by the Workspace Manager.
Projects by definition are temporary and unique endeavors with defined deliverables, thereby making them very different from Workspaces. But, a Project Manager may need to set the schedule for a resource on a project to represent the time that the User will spend on the project. Zero is a valid entry when setting a schedule for a resource.

1. Investigating resources for scheduling projects requests

After project requests have role hours forecasted, and after projects have resources scheduled onto them, that data will appear inside Capacity Planner in an interactive way.

The Capacity Planner tool inside the Portfolio Planning Application is very helpful in this scenario. This is an area where you can toggle on/off different projects and project requests during a specified span to see how the different resource needs interact with each other. For example, you might toggle off an existing project that could be put on hold to allow you to schedule two smaller projects that could
provide more total value. The Capacity Planner tool breaks out the overall capacity by Functional Role, and then you can drill down to see what it does for each User's availability.

Where this could be most useful is when you are reviewing/vetting these project request, but you are not sure of the human capital costs

Here is KB about using this tool

1. Investigating how many hours are being logged for projects

The Analysis Application would be a great place to start, specifically with the "Actual Hours Report" found under the "Standard Reports" header, as well as the "User Status Report" and "User Work Report".

The Analysis Application will also allow you to report on projects regardless of project membership, whereas the results of a project report in the Projects/Workspaces Application will only return reports that you are a part of.

These reports can help you determine how many hours are being logged against other projects that may be similar to help give an idea of how much of a particular commitment you need from a resource on a project.

The standard report titled as the "Actual Hrs Report", as well as other baked in and/or custom reports inside the Analysis Application would be a great place to find this data.
2. Investigating resources for adding them onto existing projects already in execution.

The Resource Management Application has several reports that could be useful, but specifically the four reports found under the "Reports" section. There are several filters that can be enforced to alter the way the data is displayed. These reports can give you a month or a week view in what each User's, Functional Role's, and Resource Pool's resource schedule as well as their availability.

3. Managing resource requests for users inside your Resource Pool

Resource Pools are special groups of users in TD. Resource Pools can have a few settings applied by a TD admin:

- **Notify Resource Pool Manager when resources are assigned to projects**
  - This will send an email to the Resource Pool's Manager to let them know one of their resources is being assigned to a project. This loops them in to what areas projects of your institution their resources are being pulled into.

- **Require Approval of resources on projects by Resource Pool Manager**
  - Resources inside a Resource Pool that has this setting can still be added onto a Project, but until that Resource Pool's Manager approves the resource being added, the resource request will have a status of "Pending" on the project. Whereas, if this setting
were not applied, they would be added to the project immediately and the resource request would have a status of "Active" on the project.

- If the Resource Pool manager does not wish for that resource to be added onto the project, they can deny the request, or swap the requested resource out for another, and the swapped resource can then be added onto the project.

Resource Pool Managers will see a Manage Allocations tab in the Resource Management Application to get even more granular control over where their Users are allocated.

<table>
<thead>
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<th>Jul 16</th>
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<th>Sep 16</th>
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<tr>
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Please note that in the screenshot above, you can click a blue "Help" button to see an article to learn more about this as well as several other items inside this Application. Also, in the Resource Requests, that is where you can manage the requests for the Users inside your Resource Pool.

**Desktops**

In several of the Applications mentioned above, desktops can be created to try to consolidate this info. The actual Desktop Application can consolidate most of this info into once place if need be. A Resource Management desktop may even be created to expedite the process of locating this data.