

Creating the Resource Leveling Report

USER GUIDE

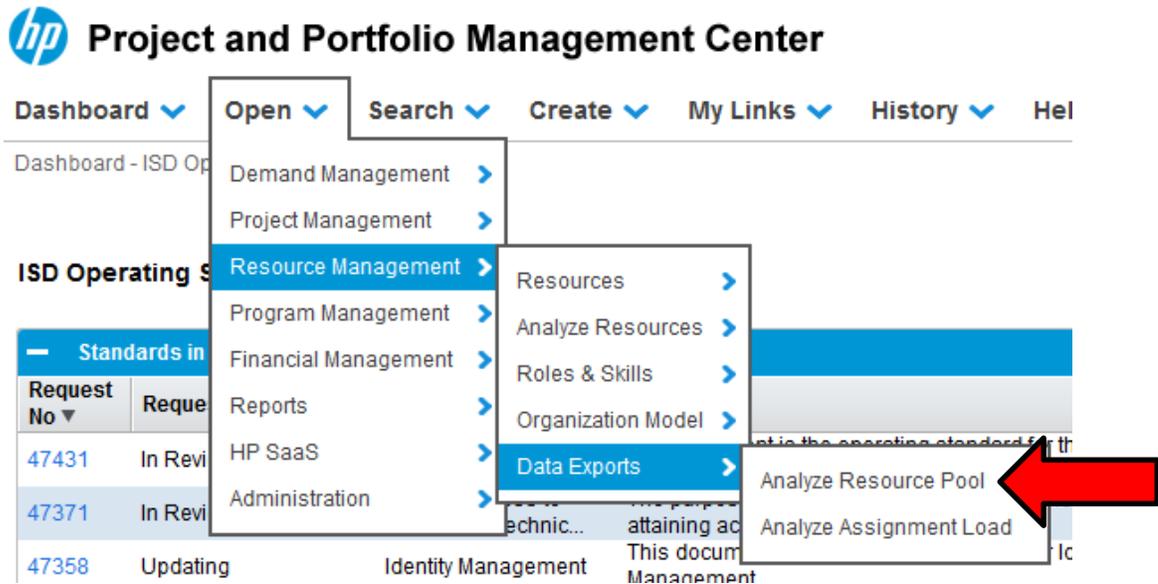
Office of Management &
Enterprise Services

Information Services Division



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1. In the PPM Tool, go to:
Open < Resource Management < Data Exports < Analyze Resource Pools



2. Select the Resource Pools and click the checkboxes next to **Active** and **In Planning**. In the Time Period section, select **Fiscal Month**, **0** past periods and **3** future periods. In the Arrange Data section, select **Staffing Profile** and check the **Include Detailed Data** checkbox. Then click the **Export To Excel** link.

Analyze Resource Pools Data Export

Set Filter Criteria for Export

*Analyze Capacity From Resource Pools: ISD-CORE; ISD-Develop and Deploy; ISD-MainFrame []

Include (only) Staffing Profiles with Status: **Staffing Profiles with Workload Category:** []

Active In Planning
 Completed Lock Down

Include (only) Lines from Resource Pools and Staffing Profiles with Specific Role: []

Time Period

Period: Fiscal Month []

Display 0 [] past periods

Display 3 [] future periods

Arrange Data

Group By: Staffing Profile [] Include Detailed Data

3. Perform the following steps within the spreadsheet:
 - A. Delete all the rows that have a blank Break Down By Role column.

	A	B	C	D	E	F	G
1	Snapshot Time Stamp: November 14, 2014 05:44:07 PM CST						
2	Analyze Resource Pool Summary			Period: Fiscal Quarter			
3	Break Down By Role	Type	Description	10/01/14	01/01/15	04/01/15	07/01/15
4		Named Resource Capacity(FTE)	Named Resource Capacity(FTE)	73.97	73.88	73.88	73.88
5		Unnamed Resource Capacity(FTE)	Unnamed Resource Capacity(FTE)	0	0	0	0
5		Total Resource Capacity(FTE)	Total Resource Capacity(FTE)	73.97	73.88	73.88	73.88
7		Total Forecast(FTE)	Total Forecast(FTE)	11.49	6.52	3.46	0.11
8							
9		Staffing Profile	OPM - Terminal Server Replacement	0.11	0	0	0

- B. For each role, delete the rows for the Total Assignment and all the lines below that say "Staffing Profile" (the B column that says "Total Assignment" and the "Staffing Profiles" underneath).

Network Technician	Total Forecast	Total Forecast	0.11	0.14	0.09	0
Network Technician	Staffing Profile	OTRD Badge Upgrade/Replacement	0	0	0	0
Network Technician	Staffing Profile	2014 Disaster Recovery Exercise	0	0	0	0
Network Technician	Staffing Profile	Tourism Opera Server Upgrade	0	0	0	0
Network Technician	Staffing Profile	Netscout Upgrade	0.09	0.14	0.09	0
Network Technician	Staffing Profile	Juniper VPN Upgrade	0.02	0	0	0
Network Technician	Staffing Profile	Oklahoma State Department of Health Data Center Cleanup Project	0	0	0	0
Network Technician	Staffing Profile	Solarwinds Re-Architecture	0	0	0	0
Network Technician	Staffing Profile	IBM Blade Center Expansion	0	0	0	0
Network Technician	Total Assignment	Total Assignment	0	0	0	0
Network Technician	Staffing Profile	OTRD Badge Upgrade/Replacement	0	0	0	0
Network Technician	Staffing Profile	2014 Disaster Recovery Exercise	0	0	0	0
Network Technician	Staffing Profile	Tourism Opera Server Upgrade	0	0	0	0
Network Technician	Staffing Profile	Netscout Upgrade	0	0	0	0
Network Technician	Staffing Profile	OTRD Badge Upgrade/Replacement	0	0	0	0
Network Technician	Staffing Profile	Center Cleanup Project	0	0	0	0
Network Technician	Staffing Profile	Solarwinds Re-Architecture	0	0	0	0
Network Technician	Staffing Profile	IBM Blade Center Expansion	0	0	0	0
Network Supervisor	Named	Allocated Named Resources	0	0	0	0

Delete these lines

- C. Sort by the Type column. Then delete all the rows that have **Total, Total Assignment** or **Total Forecast**. Also, delete the unnamed rows that have zeros in columns D, E, F and G.
 - D. Sort the spreadsheet by column **A**. Delete the roles that do not have a Staffing Profile listed.

In the example below, you would delete Application Admin and Application Security Admin, as there are no requests for those types of resources.

	A	B	C	D	E
1	Break Down By Role	Type	Description	07/01/14	10/01/14
2	Application Admin	Named	Allocated Named Resources	4	4
3	Application Architect	Named	Allocated Named Resources	0	0
4	Application Architect	Staffing Profile	EBC - Optimization Projects	0	0
5	Application Architect	Staffing Profile	EBC - Optimization Projects	0	0
6	Application Security Admin	Named	Allocated Named Resources	0	0
7	Business Analyst	Named	Allocated Named Resources	18.25	18.25
8	Business Analyst	Staffing Profile	Licensing - Dept of Labor	1.03	1.08
9	Business Analyst	Staffing Profile	SB2131 Pay Increases	0.01	0

- E. Sort by the Type column again. The purpose of this sort is to get all the “Named” types together. For each of the roles with the type “Named”, you will make a column.

Add a row and put the word “Named” in the Description column; put the numbers from columns E, F and G for each role.

	A	B	C	D	E
1	Break Down By Role	Type	Description	07/01/14	10/01/14
2	Application Architect	Named	Allocated Named Resources		0
3	Business Analyst	Named	Allocated Named Resources		18.25
4	Contractor	Named	Allocated Named Resources		0
5	Database Admin	Named	Allocated Named Resources		1.06
6	Developer	Named	Allocated Named Resources		17.17
7	Other	Named	Allocated Named Resources		0
8	Program Manager	Named	Allocated Named Resources		0
9	Project Manager	Named	Allocated Named Resources		2.5
10	Security Administrator	Named	Allocated Named Resources		0
11	Subject Matter Expert	Named	Allocated Named Resources		0
12	Technical Analyst	Named	Allocated Named Resources		0
13	Trainer	Named	Allocated Named Resources		0
14	Application Architect	Staffing Profile	EBC - Optimization Projects		0
15	Application Architect	Staffing Profile	EBC - Optimization Projects		0
16	Business Analyst	Staffing Profile	Licensing - Dept of Labor		1.03
17	Business Analyst	Staffing Profile	SB2131 Pay Increases		0.01
18	Business Analyst	Staffing Profile	Grants - TSET		0
19	Business Analyst	Staffing Profile	Grants Provisioning - Health Dept		0.35

Once you have made a column for each role, you can delete the rows with “Named” in the Type column.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Break Down By Role	Type	Description	07/01/14	10/01/14	Application Architect	Business Analyst	Contractor	Database Admin	Developer	Other	Program Manager	Project Manager	Security Administrator	Subject Matter Expert	Technical Analyst	Trainer
2	Application Architect	Staffing Profile	EBC - Optimization Projects		0												
3	Application Architect	Staffing Profile	EBC - Optimization Projects		0												
4	Business Analyst	Staffing Profile	Licensing - Dept of Labor		1.03	1.08											
5	Business Analyst	Staffing Profile	SB2131 Pay Increases		0.01	0											
6	Business Analyst	Staffing Profile	Grants - TSET		0	0											

	A	B	C	D	E	F	G	H
1	Break Down By Role	Description	Business Analyst	Contractor	Other	Project Manager	Security Administrator	
2		Named	-18.25	0	0	-2.5	0	
3	Business Analyst	Bidder and Supplier Registration (eSupplier)	0.17					
4	Business Analyst	Grants Provisioning - Aeronautics Commission	0.12					
5	Business Analyst	Grants Provisioning - DPS Okla Highway State Safety Office	0.1					

- F. Delete column B – the Type column.

G. Sort by column **D** and delete any rows with zeros in columns D, E and F.

	A	B	C	D	At
1	Break Down By Role	Description	07/01/14	10/01/14	n
2	Project Manager	ABS - EMailing Of Billing Invoices		0	0
3	Project Manager	ABS - EMailing Of Billing Invoices		0	0
4	Subject Matter Expert	ABS - EMailing Of Billing Invoices		0	0
5	Subject Matter Expert	ABS - EMailing Of Billing Invoices		0	0
6	Other	Bidder and Supplier Registration (eSupplier)		0	0
7	Project Manager	Bidder and Supplier Registration (eSupplier)		0	0
8	Security Administrator	Bidder and Supplier Registration (eSupplier)		0	0
9	Trainer	Bidder and Supplier Registration (eSupplier)		0.16	0
10	Trainer	Bidder and Supplier Registration (eSupplier)		0.16	0
11	Security Administrator	Bidder and Supplier Registration (eSupplier)		0.02	0.05
12	Project Manager	Bidder and Supplier Registration (eSupplier)		0.08	0.08
13	Business Analyst	Bidder and Supplier Registration (eSupplier)		0.16	0.17
14	Business Analyst	Bidder and Supplier Registration (eSupplier)		0.16	0.17
15	Other	Bidder and Supplier Registration (eSupplier)		0.38	0.39
16	Contractor	Commerce GPC Support - Phase II		0.04	0

H. Sort by Column **A** – the Role column. Then take the estimated hours and move under the correct role column.

A	B	C	D	E	F	G	H	I	J	K	L	M
Break Down By Role	Description	07/01/14	10/01/14	Applicatio n Architect	Business Analyst	Contractor	Database Admin	Developer	Other	Program Manager	Project Manager	Security Administra tor
Business Analyst	Bidder and Supplier Registration (eSupplier)		0.16	0.17	0.17							
	Grants Provisioning - Aeronautics Commission		0.12	0.12	0.12							
Business Analyst	Grants Provisioning - DPS Okla Highway State Safety Office		0.29	0.1	0.1							
Business Analyst	Grants Provisioning - Health Dept		0.35	0.36	0.36							
Business Analyst	Hyperion Implementation		2.05	2.15	2.15							
Business Analyst	Licensing - Dept of Labor		1.03	1.08	1.08							
Business Analyst	PeopleSoft Upgrade 9.2		0.77	0.8	0.8							
Contractor	PeopleSoft Upgrade- Performance and Tuning		0.27	1.02		1.02						
Other	Bidder and Supplier Registration (eSupplier)		0.38	0.39					0.39			
Project Manager	Bidder and Supplier Registration (eSupplier)		0.08	0.08							0.08	
Project Manager	Grants Provisioning - DPS Okla Highway State Safety Office		0.05	0.02							0.02	
Project Manager	Grants Provisioning - Health Dept		0.03	0.03							0.03	
Project Manager	Hyperion Implementation		0.82	0.86							0.86	
Project Manager	PeopleSoft Upgrade 9.2		0.75	0.77							0.77	
Security Administrator	Bidder and Supplier Registration (eSupplier)		0.02	0.05								0.05

I. Delete the role columns not used and columns **C** and **D**.

- J. At the bottom of column B, type the words “**Resources Available**”. Total the role columns with the following formula: **=SUM(C2:Cnn)*-1**. This formula will show if there are any resources left over. A negative value means you are short resources. Format the cells so the negative numbers display in red with parentheses around them.

Project Manager	Grants Provisioning - Health Dept				0.03	
Project Manager	Hyperion Implementation				0.86	
Project Manager	PeopleSoft Upgrade 9.2				0.77	
Security Administrator	Bidder and Supplier Registration (eSupplier)					0.05
	Resources Available	13.47	(1.02)	(0.39)	0.74	(0.05)

- K. Delete column **A** – the Role column.
- L. Now you will add the priority to the report. Go to the Dashboard of the portfolio you are working with. Go to the project list portlet with the Forced Ranking in it. Click the **Export to Excel** link.
- i. Delete the first row.
 - ii. Copy the Forced Ranking and the Proposal Name columns into a separate tab of the spreadsheet you have been working with.
 - iii. Make column **A** the Proposal Name and column **B** the Forced Ranking. Then delete the Title row.
 - iv. Sort the data by column **A** – the Proposal Name.
 - v. Highlight the entire list.
 - vi. Click the **Formulas** tab and then click **Name Manager**. Next, click the **New** button. Enter the word “**Ranks**” in the Name field. Click the **OK** button and then the **Close** button.
 - vii. Return to the first tab on your spreadsheet. Add a column after column **A** and name it “**Rank**”.
 - viii. Click in the first cell with the first project name.

- ix. Click the **Formulas** tab and then click **Lookup & Reference**. Next, click **VLOOKUP**. For the **Lookup_value**, click the first cell in the new column next to the first project. In the **Table_array** field, enter the word “**Ranks**”. Enter a **2** in the **Col_index_num** field. Then click the **OK** button. Copy that cell all the way to the bottom of that column.

Description		Business Analyst	Contractor	Other	Project Manager	Security Administrator
Named		-18.25	0	0	-2.5	0
Bidder and Supplier Registration (eSupplier)	=VLOOKUP(A3,Ranks,2)	0.17				
Grants Provisioning - Aeronautics Commission		0.12				
Grants Provisioning - DPS Okla Highway State Safety Office		0.1				
Grants Provisioning - Health Dept		0.36				
Hyperion Implementation		2.15				
Licensing - Dept of Labor		1.08				
PeopleSoft Upgrade 9.2		0.8				
PeopleSoft Upgrade- Performance and Tuning			1.02			
Bidder and Supplier R						0.08
Bidder and Supplier R						0.02
Grants Provisioning - Safety Office						0.03
Grants Provisioning -						0.86
Hyperion Implementa						0.77
PeopleSoft Upgrade 9						
Bidder and Supplier R						0.05
Resources Available					0.74	(0.05)

Function Arguments

VLOOKUP

Lookup_value A3 = Bidder and Supplier Registration (eSupp

Table_array Ranks = ("ABS - E Mailing Of Billing Invoices",3;"A

Col_index_num 2 = 2

Range_lookup = logical

Looks for a value in the leftmost column of a table, and then returns a value in the same row from a column you specify. By default, the table must be sorted in an ascending order.

Col_index_num is the column number in table_array from which the matching value should be returned. The first column of values in the table is column 1.

Formula result = 0

[Help on this function](#) OK Cancel

- x. The ranks should automatically populate for you.

	A	B	C	D	E	F	G
Description			Business Analyst	Contractor	Other	Project Manager	Security Administrator
Named	Ranks		-18.25	0	0	-2.5	0
Bidder and Supplier Registration (eSupplier)		0	0.17				
Grants Provisioning - Aeronautics Commission		0	0.12				
Grants Provisioning - DPS Okla Highway State Safety Office		2	0.1				
Grants Provisioning - Health Dept		6	0.36				
Hyperion Implementation		0	2.15				
Licensing - Dept of Labor		0	1.08				
PeopleSoft Upgrade 9.2		0	0.8				
PeopleSoft Upgrade- Performance and Tuning		0		1.02			
Bidder and Supplier Registration (eSupplier)		0			0.39		
Bidder and Supplier Registration (eSupplier)		0				0.08	
Grants Provisioning - DPS Okla Highway State Safety Office		2				0.02	
Grants Provisioning - Health Dept		6				0.03	
Hyperion Implementation		0				0.86	
PeopleSoft Upgrade 9.2		0				0.77	
Bidder and Supplier Registration (eSupplier)		0					0.05
Resources Available			13.47	(1.02)	(0.39)	0.74	(0.05)

You will now be able to determine which projects need which resource types and which ones do not have enough resources.