**Resource Tracking System (RTS)**

# Introduction

RTS is an initiative internal to IBG-TUS-10 for tracking the resource requirement fulfilment. This resource requirement can be associated with any generic function for which the resource fulfilment is required.

**Terminologies used:**

* **Resource:**
  + A resource is a team member. It’s not associated with any specific job profile.
* **Request:**
  + It refers to **resource requirement request**.
* **SO (Service Order)**
  + SO is a unique number generated in TechMahindra’s internal PACE-FIN portal for a resource requirement request.

**Request Types:**

1. **Internal:** Request when fulfilled internally (within the company), it is an Internal request.
2. **External:** Normally when a request is being fulfilled using resources outside the organization, the request is External.

**Internal request life cycle:**

**Initiation**

SO Phase

**Closure**

Allocation

Selection

Request incomplete

Requirement Change

**Initiation:**

* It is driven by the entry criteria.
* **An entry criterion for RTS is** that “A project or a function within IBG requires a resource to work on an existing or a new assignment”.
* A Manager/Team Lead (TL) can enter request in RTS. That will generate a new request identifier (ex. REQ1) and the request REQ1 is initiated.
* A request can have multiple Job profiles and can be associated with multiple SOs.

**Selection:**

* Selection phase can be seen as a collection of all the activities that take place to select resource/s for the request generated in Initiation phase.
  + RMG team shares profiles of the employees matching with the requested job profile/s.
  + Assessor/Interviewer shortlists the shared profiles and conducts formal or informal interviews/assessment process.
  + Selection of resource/s is done with the positive outcome of the assessment done.
* Selection drives the next step - SO (Service Order) Phase

**SO-Phase:**

* As a part of SO Phase, Manager or TL submits SO request in TechMahindra’s PACE-FIN system to get the selected resource allocated.
* SO is normally requested against the job profile and it can allocate multiple resources with the same job profile.
* SO fulfilment is done outside of RTS and RTS doesn’t control it.

**Allocation:**

* Allocation phase is entered when SO is being actioned.
* Project allocation as per SO is done outside of RTS and RTS doesn’t control it.
* If allocation is a success and all positions for the request are fulfilled, Manager or TL can move the request to the next phase - Closure.
* If the requested positions are not yet fulfilled, request will circle back to Selection phase.

**Closure:**

* This denotes the **Exit Criteria** for the request.
* If requirement changes and the resource/s are no longer required as requested on the request, the request can be closed.

**Different stakeholders in RTS:**

1. PM or TL
2. RMG team member
3. Interviewer or Assessor
4. Resource

**Entities:**

1. Request: can have following attributes
   * Identifier
   * Status
   * Mapping to Job Profile
   * No of resources required (Count)
   * Mapping to SO Details
   * Create Date
   * RRD (Resource Required by Date)
   * Close Date
   * Request Summary
2. Resource: can have following attributes
   * Identifier
   * First Name
   * Middle Name
   * Last Name
   * Contact
   * Current Work Location
   * Grade considered
   * **Employee Id**
   * **Grade selected**
   * **Project Joining Date**
   * **Request Id that hired the resource**
   * **Previous Department**
   * **Assessor**
   * **Approver (for external)**
3. Request Logs:
   1. Request id
   2. Job Title
   3. Log date
   4. Event Handler
   5. Event type id
   6. Profile count
   7. SO Id
4. Request to job profiles mapping
   1. JD Id
   2. Request id
   3. JD Title - Ex. **Excellent in java, JSP, Struts**
   4. # of years of experience - Ex. **4 to 5**
   5. Grade requested - Ex. **U4**
   6. Primary Skill - Ex. **Java, J2EE, Struts**
   7. Secondary Skill - Ex. **Junit, Maven**
   8. Additional comment - Ex. **Knowledge of JBoss application server**
5. Request to SO mapping
   1. SO id
   2. Request id
   3. SO JD Title
   4. # of Positions
   5. SO Key Skills
6. Request to interview data mapping
   1. Communication Id
   2. Request Id
   3. Job Title
   4. Interviewer Id
   5. Interviewer Grade Id
   6. Resource Id
   7. Resource Grade id
   8. Interview Outcome - select, reject, standby
   9. Interview Date
   10. Additional Comment

**Actions:**

These will go as possible user actions (menus).

**Modules:**

* Request
* Resource
* Admin
* Reports

1. Request functions:
   1. Add new request => View + Modify (including close action)
   2. Add request transaction => View + Modify
   3. Add interview details => View + Modify
   4. Add SO details - SO #, Previous IBU, JD, Key Skills
2. Resource functions:
   1. Add new resource => View + Modify
3. Admin Functions:
   1. Modify User to RTS (with default password)
   2. Modify Events meta data
4. Reports:
   1. Requests’ report for a specific duration with status and hyperlinked request ids.
   2. Resource report

**Events:**

|  |  |  |
| --- | --- | --- |
| **Event ID** | **Event Name** | **Event Description** |
| 1001 | Initiated | Caused when a request is initiated by PM or TL. |
| 1002 | Profile Shared | RMG Team Member shares profiles of the candidate/s with the requested skillset. |
| 1003 | Interview | An interviewer conducts assessment of candidate/s. |
| 1004 | Select | Interviewing Panel selects candidate/s or resource/s. |
| 1005 | SO Generation | Caused when a SO request is submitted by PM or TL in PACE-FIN. |
| 1006 | SO Completion | Caused when a SO request in PACE-FIN is marked as complete. |
| 1007 | Close Request | PM or TL closes an RTS request. |

**Request Transactions or Log:**

Can be driven based on above events:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Request id | Eve Handler | Event Type | Log Date | Job Profile | Profile Count | SO # |

* Request Id: request identifier generated at run time.
* Eve Handler: employee id of person who handles this event.
* Log Date: current system time and date.
* Job Profile: will mostly the foreign key to the job profile table.
* Profile Count: Indicates number of profiles shared, or profiles interviewed or profiles selected.
* SO #: Link to SO details.

1. Initiated: will log

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Request id | Eve Handler | Event Type | Log Date | Job Profile | NULL | NULL |

1. Profile Shared: will log

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Request id | Eve Handler | Event Type | Log Date | Job Profile | Profile Count | NULL |

1. Interview: will log

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Request id | Eve Handler | Event Type | Log Date | Job Profile | Profile Count | NULL |

1. Select: will log

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Request id | Eve Handler | Event Type | Log Date | Job Profile | Profile Count | NULL |

1. SO Generation

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Request id | Eve Handler | Event Type | Log Date | Job Profile | Profile Count | SO # |

1. SO Completion

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Request id | Eve Handler | Event Type | Log Date | Job Profile | Profile Count | SO # |

1. Close Request

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Request id | Eve Handler | Event Type | Log Date | Job Profile | Profile Count | SO # |

**Possible Meta Data:**

1. **RTS Users** - can consist of TLs, Interview Panels, PMs, SPMs and above.
2. **Request Status** - can be Open, In Progress or Close.
   * Open - Initiated and no profile shared yet from RMG.
   * In Progress - will cover events - Profile Sharing, Interview, Select, SO Generation and SO Completion.
   * Close
3. **Event** - refer table from “Events” section.
4. **Interview outcome** -SEL: Selected; REJ: Rejected; HLD: Standby/Hold