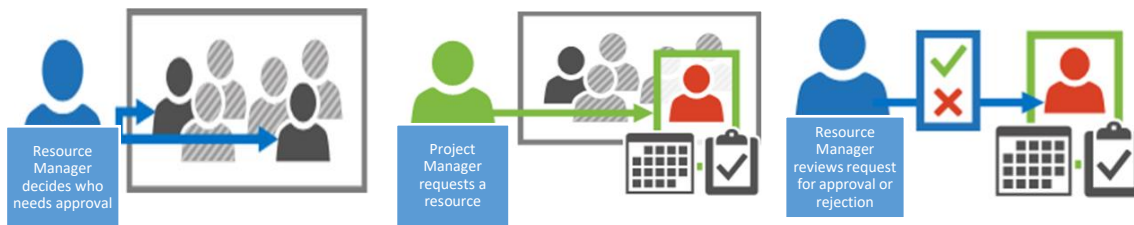


What are Resource Engagements?

Project Managers and Resource Managers can find it challenging to agree on resource assignments. Difficulty in seeing who is working on what and understanding resource allocation can impact the communication between the Resource Manager and Project Manager. Resource engagements were designed to improve communication between Resource Managers and Project Managers to avoid over allocation. Resource engagements provide a top down approach to managing resources. Project Managers reserve a skillset for a specified period and note the allocation using hours or units to specify a percentage of the resource's time.



Preparing for Resource Engagements

Engagements are created within Project Pro 2016. You must have Project Pro 2016 to utilize this functionality.

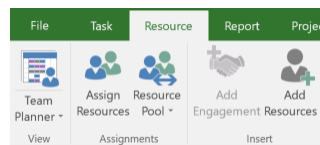
If your organization uses Project Online, engagements are available. On premise solutions require Project Server 2016.

Creating a Resource Engagement

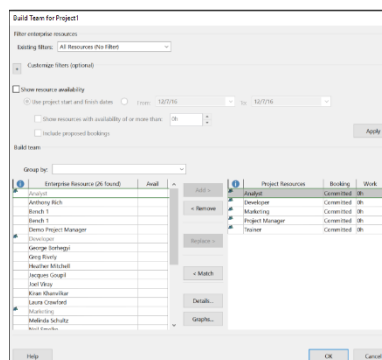
Open your project connected to your Project Online/Project Server 2016 environment. You must first build the team.

To add resource to the project team:

1. From the Resource ribbon, select **Add Resources**.



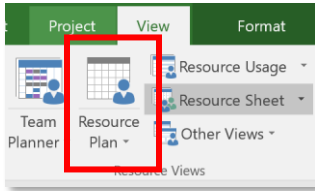
2. Select **Build Team from Enterprise**. Choose the resources you wish to add to the team. If you are starting from a template the generic resources may already be added to the project plan. Resource engagements can be created for either named or generic resources



3. Click **OK**.
4. Publish the project if you have not done so yet.

Note: The project must be published prior to creating an engagement request.

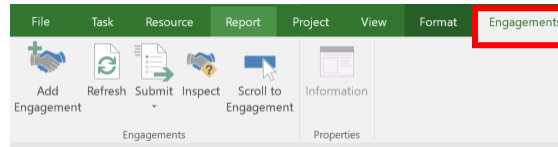
- From the View ribbon, select the Resource Plan view. The resources you added to your team will be listed in this view.



	Name	Proposed Start	Proposed Finish	Proposed Max	Engagement Status	Details	Qtr 3, 2016	Aug	Sep	Qtr 4, 2016	Oct
1	Analyst		NA	NA		Prop. Max Units Com. Max Units					
2	Developer		NA	NA		Prop. Max Units Com. Max Units					
3	Marketing		NA	NA		Prop. Max Units Com. Max Units					
4	Project Manager		NA	NA		Prop. Max Units Com. Max Units					
5	Trainer		NA	NA		Prop. Max Units Com. Max Units					

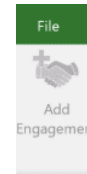
Once the engagement is created, the timephased grid can be edited.

- Select **Engagements**.



- Select the row of the resource and click **Add Engagement**.

If the project has never been published, Add Engagements will be greyed out.



- Enter the **Engagement Information** and click **Ok**.

Engagement Information

Resource: Analyst

Description:

Start: 9/30/16 End: 1/31/17

Allocate Resources by:

Units: 25%

Work:

Comments:

This project requires an experienced analyst

Help OK Cancel

Enter a percentage of the resource time or the total hours required over the duration of the project.

	Name	Proposed Start	Proposed Finish	Proposed Max	Engagement Status	Details	Qtr 4, 2016	Nov	Dec	Qtr 1, 2017	Jan	Feb
1	Analyst	9/30/16	1/31/17	25%	Draft	Prop. Max Units Com. Max Units	25%	25%	25%	25%	25%	
2	Developer	NA	NA			Prop. Max Units Com. Max Units						
3	Marketing	NA	NA			Prop. Max Units Com. Max Units						
4	Project Manager	NA	NA			Prop. Max Units Com. Max Units						
5	Trainer	NA	NA			Prop. Max Units Com. Max Units						

The engagement status will change to proposed once submitted.

You can edit the work contour on the timephased grid.

- Continue creating engagement requests for all the resources.

	Name	Proposed Start	Proposed Finish	Proposed Max	Engagement Status	Details	Qtr 4, 2016	Nov	Dec	Qtr 1, 2017	Jan	Feb
1	Analyst	9/30/16	1/31/17	50%	Draft	Prop. Max Units Com. Max Units	50%	25%	25%	25%	25%	
2	Developer	9/30/16	9/30/16	50%	Draft	Prop. Max Units Com. Max Units	50%					
3	Lever 2 Developer	9/30/16	9/30/16	50%	Draft	Prop. Max Units Com. Max Units	50%					
4	Marketing	NA	NA			Prop. Max Units Com. Max Units						
5	Project Manager	NA	NA			Prop. Max Units Com. Max Units						
6	Trainer	NA	NA			Prop. Max Units Com. Max Units						

Tool Tip: Create the engagement request for one month for each resource and then fill across/down on the timephased grid.

- Once all engagements have been completed select submit.

Note: You can submit all engagement or only selected engagements.

- The Engagement Status will change from draft to proposed.

	Name	Proposed Start	Proposed Finish	Proposed Max	Engagement Status	Details	Qtr 4, 2016	Nov	Dec	Qtr 1, 2017	Jan	Feb
1	Analyst	9/30/16	1/31/17	50%	Proposed	Prop. Max Units Com. Max Units Prop. Work	50%	25%	25%	25%	25%	
2	Developer	9/30/16	9/30/16	50%	Proposed	Prop. Max Units Com. Max Units Prop. Work	50%					
3	Lever 2 Developer	9/30/16	9/30/16	50%	Proposed	Prop. Max Units Com. Max Units Prop. Work	50%					
4	Marketing	11/1/16	12/7/16	50%	Proposed	Prop. Max Units Com. Max Units Prop. Work			50%	50%		
5	Project Manager	9/30/16	1/31/17	25%	Proposed	Prop. Max Units Com. Max Units Prop. Work	25%	25%	25%	25%	25%	
6	Trainer	12/1/16	1/31/17	50%	Proposed	Prop. Max Units Com. Max Units Prop. Work	2h	42h	44h	44h	44h	

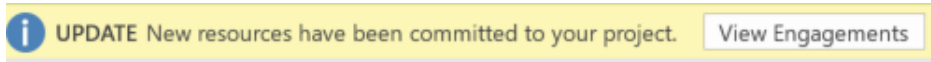
Right click on the details columns to add Proposed Work.

Checking the Status of a submitted Engagement Request

Project managers can check the status of the proposed engagement request by refreshing the page. The project does not need to be closed and checked back in.



If the project Manager does not refresh the screen a yellow banner will appear alerting them that new resources have been committed.



Note: The Resource Manager replaced the generic resources for named resources in my project.

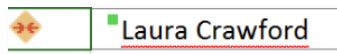
Name	Proposed Start	Proposed Finish	Proposed Max	Engagement Status	Units	PULSE HOURS WITH UNITS TO				
						Sep	Oct	Nov	Dec	Jan
Analyst	NA	NA			Prop. Max Units Com. Max Units Prop. Work					
Developer	NA	NA			Prop. Max Units Com. Max Units Prop. Work					
Marketing	NA	NA			Prop. Max Units Com. Max Units Prop. Work					
Project Manager	NA	NA			Prop. Max Units Com. Max Units Prop. Work					
Trainer	NA	NA			Prop. Max Units Com. Max Units Prop. Work					
Laura Crawford	12/1/16	1/31/17	50%		Prop. Max Units Com. Max Units Prop. Work				50%	11%
	12/1/16	1/31/17	50%	Committed	Prop. Max Units Com. Max Units Prop. Work				50%	11%
Heather Mitchell	11/1/16	12/7/16	50%		Prop. Max Units Com. Max Units Prop. Work			50%	50%	20%
	11/1/16	12/7/16	50%	Committed	Prop. Max Units Com. Max Units Prop. Work			88h	4h	20%
Jacques Goupil	9/30/16	1/31/17	50%		Prop. Max Units Com. Max Units Prop. Work	50%	25%	25%	25%	25%
	9/30/16	1/31/17	50%	Committed	Prop. Max Units Com. Max Units Prop. Work	50%	25%	25%	25%	25%
Scott Clausen	9/30/16	9/30/16	50%		Prop. Max Units Com. Max Units Prop. Work	4h	42h	44h	44h	44h
	9/30/16	9/30/16	50%	Committed	Prop. Max Units Com. Max Units Prop. Work	4h	42h	44h	44h	44h

Understanding Indicators

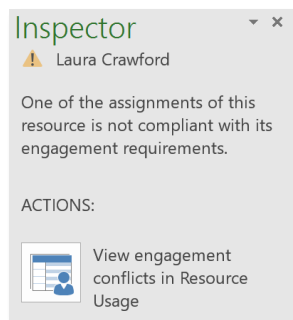
Administrators can identify resources that require approval. Project Managers can still assign those resources to tasks in the project plan, however an indicator will appear next to the Resource Name in all resource views. The indicator appears when the resource is assigned without submitting an engagement request.



A red squiggly line will appear under the resource if the assignments are not compliant with the approved engagement.



Project Managers can right click to view the conflict in the Engagement Inspector.

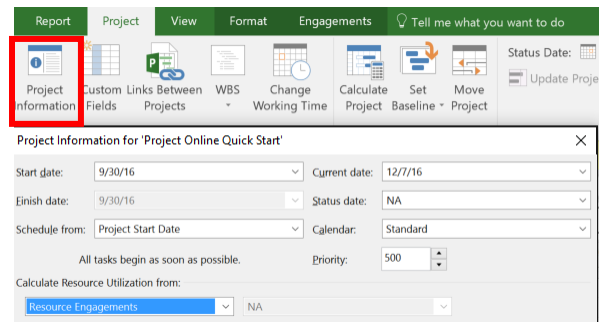


Engagements can be edited at any time in the project. If the demand for the resource increases or decreases the project manager can adjust the hours or percentage on the timephased grid and resubmit the edits to the Resource Manager.

Calculating Utilization

From the Project Ribbon:

1. Select **Project Information**
2. Select how to calculate resource utilization
 - From Project Plan
 - Resource Engagements
 - From the Project Plan until and specify the date



What Resource Utilization option should we use...when?

- Scenario 1: You do not have detail resource assignment/estimates or only have Full-time Equivalent (FTE) information - use **Resource Engagements** for **Top Down Resource Planning**
- Scenario 2: You have all the project and resource assignment data in your project schedule - use **Project Plan** for **Bottom's Up Resource Planning**
- Scenario 3: You have detailed information for the 1st few months only - use **Project Plan until a specified date** for **Top Down Meets Bottom's Up Resource Planning**



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