



Microsoft Partner
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Silver Collaboration and Content
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Battling for Resources: Can't We All Just Get Along

Presented by: Laura Crawford

Agenda

Introductions

Resource Engagements Overview

Creating & Submitting Engagements

Approving/Rejecting/Editing Engagements

Demo Resource Engagements

Q & A

Laura Crawford



Senior PPM Specialist

Laura has over 8 years of experience with Microsoft PPM and offers a unique combination of business, project management, and technical expertise. Laura is an expert at envisioning and delivering solutions that utilize technologies across the Project Online, SharePoint and Business Intelligence platforms. Laura holds an BS from State University of New York College at Oswego and is a Microsoft Certified Trainer and a Microsoft Specialist.



Why PPM Works

- **Gold Microsoft Certified Partner** exclusively focused on **Microsoft Project, SharePoint, and Office 365**
- Some recent **Experience** includes Allergan, Medtronic, Plantronics, Shire, Synopsys and many more...



Medtronic



SYNOPSYS[®]

- We believe in **partnering** with you, **exceeding expectations** to build **long lasting success**.
- Our team's experience runs deep with Microsoft.
 - Over **225 Project Server implementations** and Trained **thousands** of students
 - Delivered **dozens** of Industry presentations (Microsoft Project Conference, Project Summit, PMI Conference)
 - Created **hundreds** of webcasts and blog articles
- We have contributed to the **new release of Microsoft Project and Project Server** for the past three cycles and share our expertise as volunteers for Microsoft, PMI, MPUG, and Project Summit.
- We **guarantee your success** and **our results** – we are not done until you are a satisfied client reference



Why Clients Choose PPM Works

Our Philosophy: We believe in honesty, integrity, and dedication – our passion for success drives our team. PPM Works core values start with family and health first to provide the most for our clients.

- Quality of Services are unmatched
- Trusted Experience
- Listening comes 1st
- Proven Methodology and Templates
- Competitive Pricing



Thank you for the information share today! You are so knowledgeable and a gifted presenter/teacher.

Program Manager, UnitedHealth Group



I wish we would have found PPM Works a long time ago - you make Microsoft Project understandable for all

Large Boston-based Pharma Co, Director of Training



I've attended several industry webcasts, conference sessions, and vendor meeting – this week's MPUG webinar certificate series on Microsoft Project (Online, Server, and Professional) was by far the best and I found it very useful – thank you.

Sr. Project Manager Consultant, Large Legal Firm



Learning Objectives

In today's webinar we will demonstrate the collaborative features of Resource Engagements.

At the end of today's session you will be able to:

- Create a new Engagement
- Select how to calculate resource utilization for your project
- Understand how Resource Managers accept/reject/edit engagements
- Monitor engagements

A close-up photograph of a person's hands typing on a laptop keyboard. The person is wearing a green top and a gold bracelet. The background is blurred, showing other people in a professional environment. A blue semi-transparent banner is overlaid at the bottom of the image.

Resource Engagements Overview

Resource Engagements

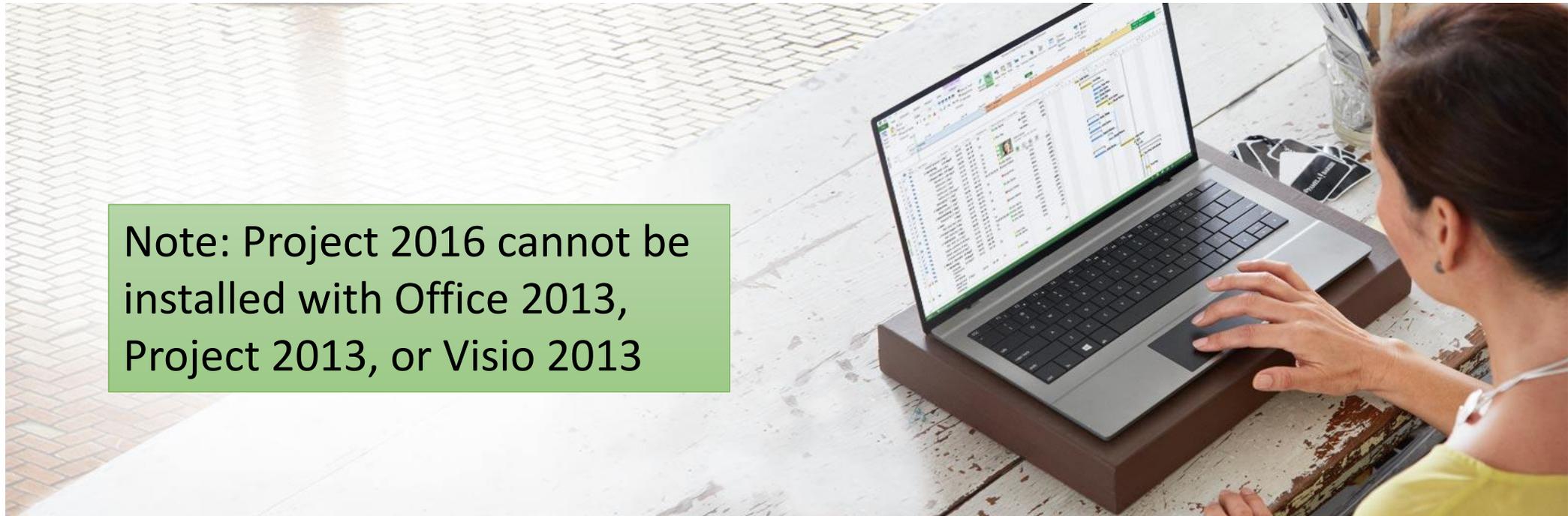
- Now Available in both Project Online and Project Server 2016



Goal: Ensure resources are being used appropriately and effectively throughout your organization.

Install Project Professional 2016

Engagements are created within Project Pro 2016



Note: Project 2016 cannot be installed with Office 2013, Project 2013, or Visio 2013

Resource Utilization Calculation Scenarios

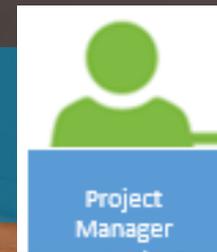
What Resource Utilization option should we use...when?

- **Scenario 1:** If you want to perform Top-Down Planning or if you do not have detailed resource assignment/estimates - use **Resource Engagements**
- **Scenario 2:** If you want to perform Bottom-Up Planning or if you have all the project and resource assignment data in your project schedule - use **Project Plan**
- **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**





Resource Utilization Settings

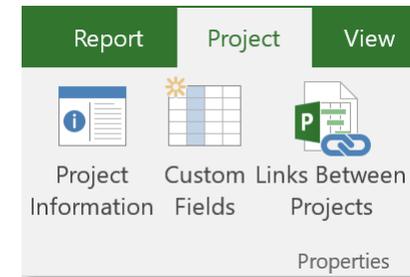


Project
Manager

Set Your Project Resource Utilization to Pull From Resource Engagements

From the Project Ribbon:

- Select Project Information
- Select how to calculate resource utilization
 - From Project Plan
 - **Resource Engagements**



Project Information for 'PPM Works Engagement Demo 1'

Start date:	<input type="text" value="Tue 3/28/17"/>	Current date:	<input type="text" value="Tue 3/28/17"/>
Finish date:	<input type="text" value="Tue 3/28/17"/>	Status date:	<input type="text" value="NA"/>
Schedule from:	<input type="text" value="Project Start Date"/>	Calendar:	<input type="text" value="Standard"/>

All tasks begin as soon as possible. Priority:

Calculate Resource Utilization from:

<input type="text" value="Resource Engagements"/>	<input type="text" value="NA"/>
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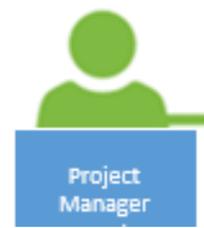
Enterprise Custom Fields



Creating and Editing Resource Engagements

Creating and Editing Resource Engagements

- Project Managers create resource engagements in the new Resource Plan view in Project Pro 2016



	Name	Proposed Start	Proposed Finish	Proposec Max	Engagement Status	Details	Mar	Apr	May
	Kiran Khanvilkar		NA	NA		Prop. Max Units Com. Max Units			
	Anthony Rich		NA	NA		Prop. Max Units Com. Max Units			
	Jacques Goupil		NA	NA		Prop. Max Units Com. Max Units			
	Scott Clausen		NA	NA		Prop. Max Units Com. Max Units			
	Heather Mitchell		NA	NA		Prop. Max Units Com. Max Units			
	Selena Huck		NA	NA		Prop. Max Units Com. Max Units			
	Demo Project Mana		NA	NA		Prop. Max Units Com. Max Units			
	Laura Crawford		NA	NA		Prop. Max Units Com. Max Units			

Project View Format

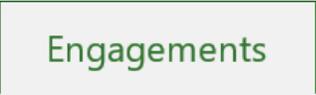
Team Planner Resource Plan Other Views

Resource Views

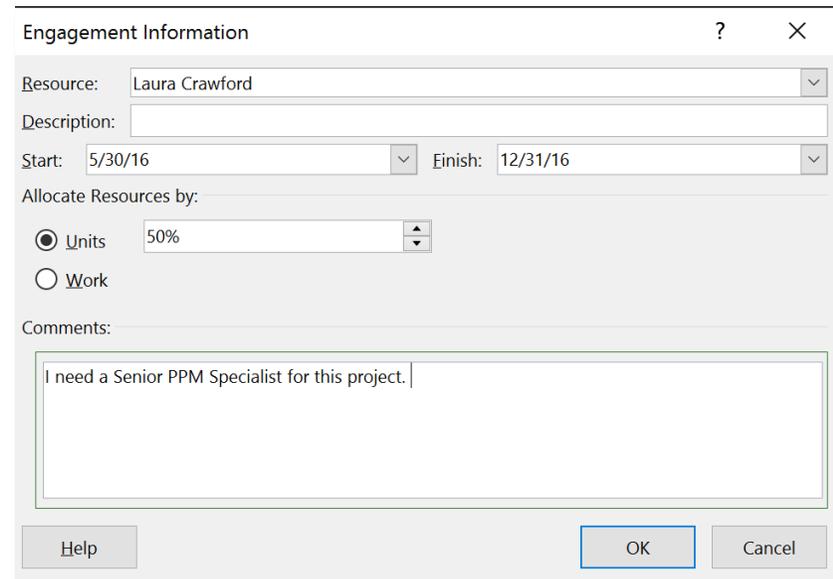
Engagements are not created in the timephased grid of this view. The grid is not editable until the engagement is created.

Creating and Editing Resource Engagements

From the Resource Plan view:

- Select the Engagements tab 
- Highlight the row of the resource and select Add Engagement
- Enter the Description, Start and Finish Dates
- Allocate resources by Units or Work
- Add comments
- Click OK

Engagements are created individually for each resource.



The screenshot shows the 'Engagement Information' dialog box with the following fields and options:

- Resource: Laura Crawford
- Description: (empty)
- Start: 5/30/16
- Finish: 12/31/16
- Allocate Resources by: Units (50%) and Work
- Comments: I need a Senior PPM Specialist for this project.

Buttons at the bottom: Help, OK, Cancel.



Project
Manager



Add
Engagement

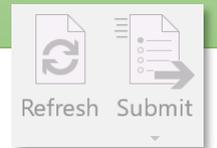
Submitting the Engagement

- The Engagement Status will be **Draft** until the engagement is submitted
- The project must be **published** in order to submit the engagement
- Modify the work contour for the engagement as needed in the timephased grid

Draft



Note: The Submit command is greyed out until the project is published.



	Laura Crawford	<u>5/30/16</u>	<u>12/30/16</u>	<u>50%</u>		Prop. Max Units			50%	25%	25%	50%
		5/30/16	12/30/16	50%	Draft	Com. Max Units						
						Prop. Max Units			50%	25%	25%	50%
						Com. Max Units						

Submitting the Engagement

- The default view displays Proposed and Committed Max Units

Prop. Max Units
Com. Max Units

Prop. Max Units
Com. Max Units
Prop. Work

Right click on Prop. Max Units to display additional field choices. Select Proposed Work to adjust the Work contour in hours.



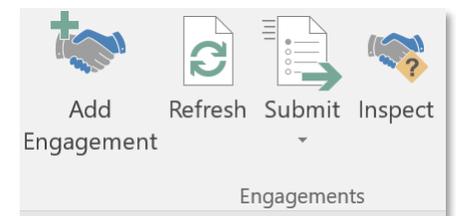
Project
Manager

Submitting the Engagement



Once you have completed editing all engagements:

- Highlight the row of the engagement and click on the **Submit** drop down
- Submit selected engagements or **Submit all** engagements to submit multiple requests

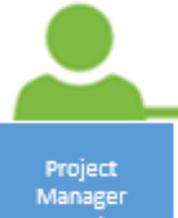


	Laura Crawford	5/30/16	12/30/16	50%	
		5/30/16	12/30/16	50%	Proposed

Note: The status changes from Draft to Proposed once submitted.

Engagement Inspector

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



	 Laura Crawford	Work
---	--	------

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

Inspector

 Laura Crawford

One of the assignments of this resource is not compliant with its engagement requirements.

ACTIONS:

 View engagement conflicts in Resource Usage



Approving, Rejecting, and Editing Engagements in Project Online



Adding Email Reminders for Requests

- From the My Resource Requests section of the [Manage My Resources' Alerts and Reminders](#) page, choose the Send a reminder about pending resource requests checkbox

TIP

Project



- Send email to me
- Send email to my team members
- Send email to me and my team members

My Resource Requests

Create resource request reminders to help keep your team running smoothly. Your team consists of all resources you have resource engagement permissions for. Choose which resources you are subscribed to from Resource Center.

Resource Requests

Send a reminder about pending resource requests: Every Day

My Resources' Status Reports

Create alerts and reminders to help you submit timely status reports. "My Resources" refers to anyone from whom you have requested a status report.

Status Report Alerts

Alert me when my resources:

Submit a status report

Status Report Reminders

Approving, Rejecting, and Editing Engagements in Project Online

Resource Managers can accept, reject and/or edit engagement requests in Resource Center.

- From the ribbon, select **Resource Requests**
- View all pending Resource Requests
- Accept or reject the request



BROWSE		ENGAGEMENTS			OPTIONS					
							View: Engagement Details			
Update		Engagements			Display		Filter: No Filter	Navigate		
Resource Requests										
		Resource Name	Description	Project	Requester	State ↑	Committed Uni	Committed Stai	Committed Fini	
		Resource Name: Laura Crawford				Proposed	50%	5/30/2016	12/30/2016	
		Project: Resource Engagements 2016				Proposed	50%	5/30/2016	12/30/2016	
<input checked="" type="checkbox"/>		Laura Crawford		Resource Engage	Laura Crawford	Proposed	50%	5/30/2016	12/30/2016	

Accepting, Rejecting or Editing the Engagement

- Add comments for the Project Manager
- Edit the existing request
 - Modify the work or units
 - Swap an over-allocated resource for one with availability using the drop down next to the selected resource name.



		▾ Resource Name: Anthony Rich
		▾ Project: Contoso PO
<input checked="" type="checkbox"/>		Anthony Rich ▾

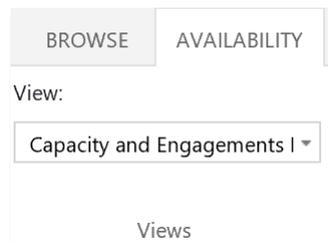
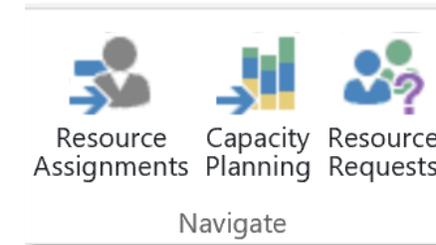
The names in the drop down are those selected in Resource Center. If the named or generic resource is not listed, navigate back to Resource Center and add the resource to those selected.

A photograph of two women in a computer lab. They are looking at multiple computer monitors. The woman in the foreground is looking at a monitor displaying a heatmap. The background is slightly blurred, showing other computer workstations.

Analyzing Capacity and Engagements Heatmap

Analyzing the Capacity and Engagements Heatmap

- From Resource Center select Capacity Planning:
- From the view drop down select Capacity and Engagements Heatmap



Capacity and Engagements Heatmap

View the discrepancies between resource capacity and committed engagements for these resources.

Resource Engagements	5/1/2016	6/1/2016
▾ Jacques Goupil	0h	176h
Contoso PO	0h	176h
▾ Laura Crawford	8h	151.38h
Contoso PO	0h	88h
Fun Times	0h	19.38h
Resource Engagements 2016	8h	44h
Scott Clausen	0h	0h
▾ Selena Huck	0h	4h
Contoso PO	0h	4h

Analyzing the Capacity and Engagements Heatmap

- **Blue** – The resource's engaged time is significantly lower than the resource's overall capacity, and should be given more work.
- **Green** – The resource's engaged time is roughly the same as the resource's overall capacity
- **Red** - The resource's engaged time is significantly higher than the resource's overall capacity, and should have some work either reassigned to someone else, or moved to a less-busy timeframe.



Over by 10%

Under by -10%

Thresholds

Details:

	6/1/2015	6/7/2015	6/14/2015	6/21/2015	6/28/2015	7/5/2015
Accountant	0h	0h	0h	0h	0h	0h
Allie Mack	80h	80h	96h	80h	40h	40h
Building a High Speed Train	40h	40h	40h	40h	40h	40h
Fast train to the East Coast	40h	40h	56h	40h	0h	0h
Cody Moresby	40h	40h	40h	40h	40h	0h
Roadwork in Seattle	40h	40h	40h	40h	40h	0h
Iris Baxter	40h	40h	40h	40h	40h	0h
Fast train to the East Coast	40h	40h	40h	40h	40h	0h
Kat Larsson	40h	40h	0h	0h	0h	0h
Fast train to the East Coast	40h	40h	0h	0h	0h	0h

Creating Engagements in Resource Center

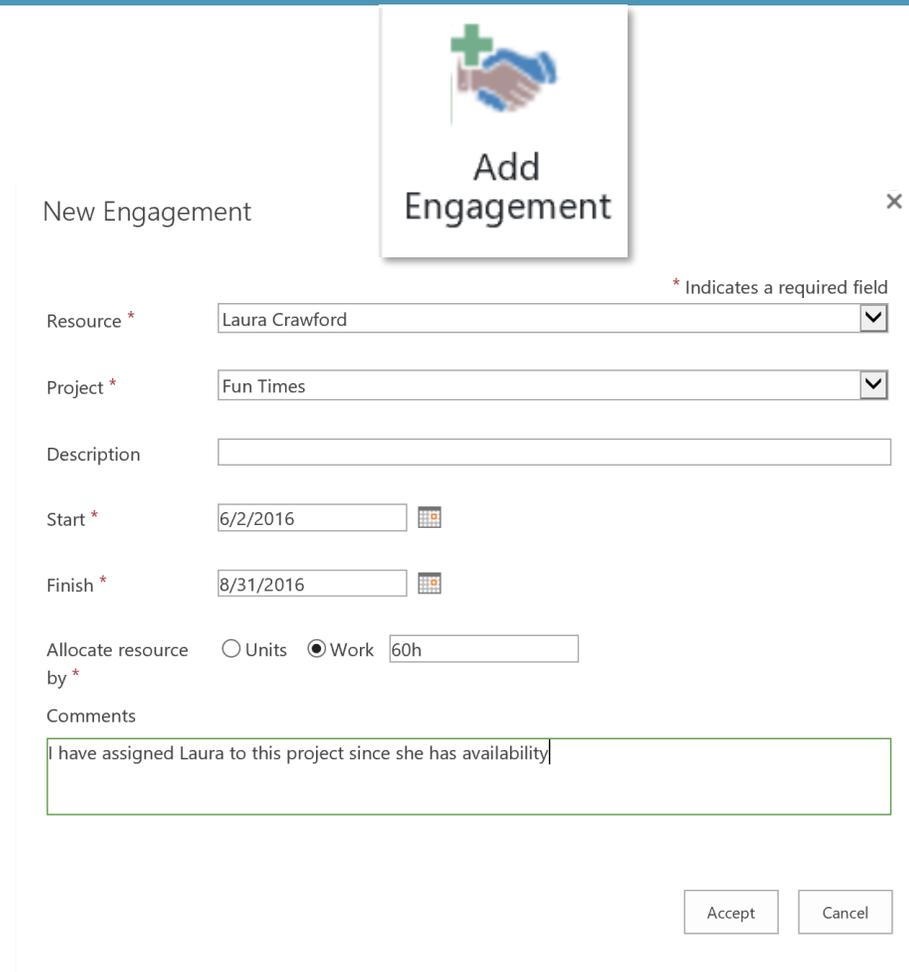


Resource
Manager

Adding an Engagement From Resource Center

- Select Add Engagement
- Complete the required fields
- Click Accept
- The engagement status is committed

Note: Only Resource Managers and Admins can create an engagement from Resource Center so this method automatically commits resource to your project



Add Engagement

New Engagement ×

* Indicates a required field

Resource * ▼

Project * ▼

Description

Start * 

Finish * 

Allocate resource by * Units Work

Comments



Project
Manager

PM Reviews Committed Resources for Project

Viewing Status of Engagements

If the project was checked back in, upon opening in Project Pro the Project Manager will see the following:



 UPDATE New resources have been committed to your project. [View Engagements](#)

- Click View Engagements to navigate to the Resource Plan view.



LinkedIn:

**<https://www.linkedin.com/in/lauracrawfordmct/> and
<https://www.linkedin.com/company/ppm-works-inc->**

Our Site: www.ppmworks.com

Blog: <http://blogs.ppmworks.com>

Calls To Action

1. Start incorporating these techniques today
2. Check out our Blogs / webcasts
3. Get LinkedIn with me (Laura Crawford)
4. Send questions to Info@ppmworks.com

Contact Us

**We'd Love to Hear From You-
Get In Touch With Us!**

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