



Keys to Effective Resource Management

Presented by Laura Crawford

February 20th, 2018

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.



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- 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

Agenda

Non-labor Resources

Resource Assignments

Capacity Forecasting

Task Management

Time Capture and Approvals

Question and Answer



Resource Assignments Overview

Resource Types

- **Work** – people or equipment
- **Material** – consumable resources such as manuals and software
- **Cost** – typically associated with an invoice, do not have a built in rate, i.e. travel and lodging

Budget work and cost resources can also be tracked in projects.

Resource Assignments

- Build your project team
- Replace generic resources with named resources
- Adjust the units when assigning resources to account for non-project work and other assignments

The screenshot displays the 'Assign Resources' dialog box in PPM Works. The 'Task' tab is active, showing a tree view of tasks under 'Bentwater Club House'. The 'Document Requirements' task is selected. The 'Resource List options' section shows a table of resources from 'Bentwater Club House' with columns for Resource Name, R/D, Units, and Cost. The resource 'Laura Crawford' is selected with 50% units and a cost of \$12,000.00. The 'Assign Resources' button is highlighted with a red box. The 'Report' tab is also visible, showing 'Add Engagement Resources' and 'Add Resources' options.

Resource Name	R/D	Units	Cost
✓ _Analyst		20%	\$24.00
✓ _Developer		50%	\$4,800.00
✓ _Marketing		30%	\$2,880.00
✓ _Project Manager		40%	\$3,840.00
✓ _Trainer		10%	\$960.00
✓ Laura Crawford		50%	\$12,000.00
□ Cindy Moore			
□ Jacques Goupil			
□ Kiran Khanvilkar			
□ Scott Clausen			
□ Training Manuals			

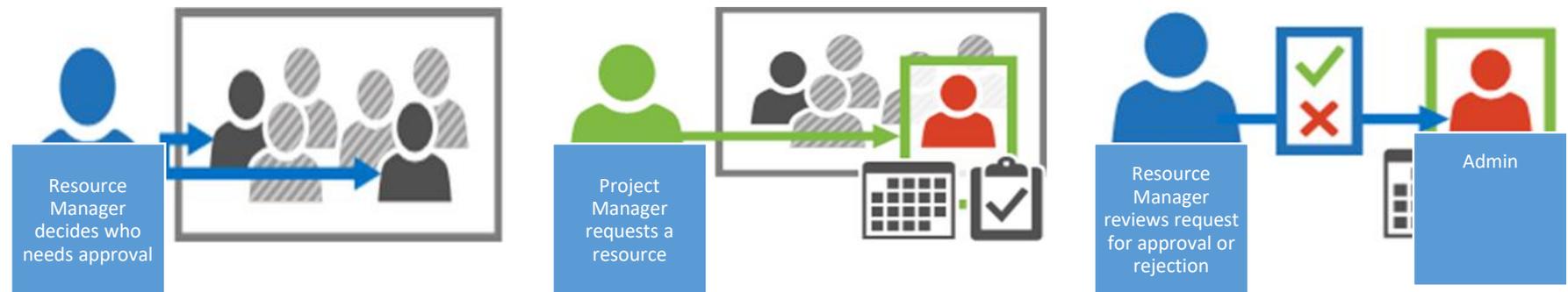
Capacity Forecasting

Do we have the resources to do the projects?
How can we track who does what and when?



Resource Engagements

- Available in both Project Online and Project Server 2016



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

Resource Utilization Calculation Scenario

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**

Calculating Resource Utilization

By default Project calculates resource utilization from the project plan.

- Change the calculation setting in the Project Information dialog box in Project Pro

Project Information for 'Bentwater Club House'

Start date: Mon 1/1/18 Current date: Mon 2/19/18
Finish date: Thu 5/17/18 Status date: NA
Schedule from: Project Start Date Calendar: Standard
All tasks begin as soon as possible. Priority: 500

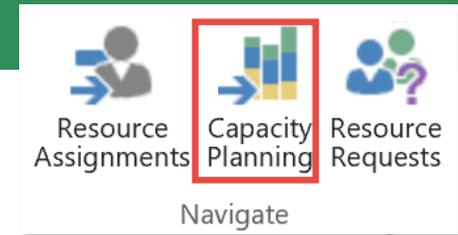
Calculate Resource Utilization from:
Resource Engagements NA

Enterprise Custom Fields
Department: Operations

Custom Field Name	Value
Archive	No
Auto Publish	Yes
Benefit	
Budgeted Project Cost	\$0.00
Cost Status	#ERROR
Current Project Cost	\$0.00
Manual Cost Status	Calculated
Manual Schedule Status	Calculated
Original Budget	\$0.00
Overall Status	Green
Planner Group Email	

Help Statistics... OK Cancel

Capacity Planning Views



Series (Click to hide)

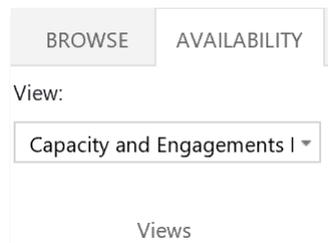
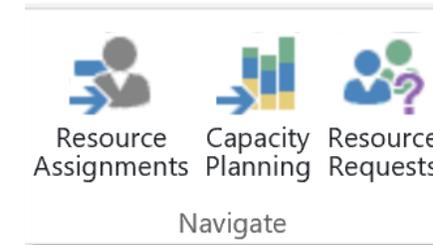
- Cindy Moore
- Jacques Goupil
- Kiran Khanvilkar
- Laura Crawford
- Scott Clausen

Resource	Availability	Capacity	Remaining
Jacques Goupil	128h	122h	170.67h
Availability	128h	122h	170.67h
Capacity	168h	152h	176h
Project Assignments	40h	30h	5.33h
EComm Rollout (Sync)	8h	28h	
Goodron			5.33h
PPMW Planner Sync Demo	32h	2h	
Kiran Khanvilkar	166h	114h	39.54h
Availability	166h	114h	39.54h
Capacity	168h	152h	176h
Project Assignments	2h	38h	136.46h
Bentwater Club House			92.46h
ML Project Online Deployment 2016	2h	38h	44h

Capacity Planning Views in Resource Center display Availability and Capacity for each selected resource.

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

Task Management

Identify tasks with overallocated resources:

- Red indicators will appear in Gantt and Usage views
- Resources overallocated will turn red on the Resource Sheet view

Monitor the critical path to insure resource overallocation is not impacting the schedule.

ID	Resource Name	Inactive	Generic	Type	RBS	% Complete	Task Mode	Task Name
1	<u>Analyst</u>	No	No	Work		0%	→	Bentwater Club House
2	<u>Developer</u>	No	No	Work		0%	→	Requirements
3	<u>Marketing</u>	No	No	Work		0%	→	Document Requirements
4	<u>Trainer</u>	No	No	Work		0%	→	Review and Approve Requirements
5	<u>Project Manager</u>	No	No	Work		0%	→	Requirements Complete
6	Laura Crawford	No	No	Work				Project Ma
7	Jacques Goupil	No	No	Work	IT			Trainer
8	Scott Clausen	No	No	Work				Project Ma
9	Kiran Khanvilkar	No	No	Work				Developer Operations
10	Cindy Moore	No	No	Work				Analyst
11	Training Manuals	No	No	Material				

Task Management

The Task Inspector

Inspector [x]

Document Requirements

Resources assigned in nonworking time

- _Analyst
- _Developer
- _Marketing
- _Project Manager
- _Trainer

Move task to resource's next available time.

Info

Factors affecting the task's start date:

Auto Scheduled

Project Start: 1/2/18

Task Mode	Task Name	Duration	Start	Finish
	Bentwater Club House	95.97d	Tue 1/2/18	Thu 5/17/18
	▾ Requirements	19.46d	Tue 1/2/18	Tue 1/30/18
	Document Requirements	15d	Tue 1/2/18	Tue 1/23/18
	Review and Approve Requirements	4.46d	Wed 1/24/18	Tue 1/30/18
	Requirements Complete	0d	Tue 1/30/18	Tue 1/30/18
	▾ Design	25.75d	Tue 1/30/18	Thu 3/8/18
	Document Design	20d	Tue 1/30/18	Wed 2/28/18
	Review and Approve Design	5.75d	Wed 2/28/18	Thu 3/8/18
	Design Complete	0d	Thu 3/8/18	Thu 3/8/18
	▾ Development/Implementation	22.69d	Thu 3/8/18	Mon 4/9/18
	Development/Implementation	7.69d	Thu 3/8/18	Mon 3/19/18
	Implementation Playbook	3w	Mon 3/19/18	Mon 4/9/18
	Development/Implementation Complete	0d	Mon 3/19/18	Mon 3/19/18
	▾ Testing/Verification	20d	Mon 3/19/18	Mon 4/16/18
	Testing/Verification	20d	Mon 3/19/18	Mon 4/16/18
	Testing/Verification Complete	0d	Mon 4/16/18	Mon 4/16/18
	▾ Documentation	23.06d	Mon 4/16/18	Thu 5/17/18
	Documentation	20d	Mon 4/16/18	Mon 5/14/18

Time Capture and Approvals

Resources can submit task updates via a Timesheet or the Tasks page.

	Task Name/Description ↑	Remaining Wor	% Work Comp	Time Type	Sun 2/11	Mon 2/12	Tue 2/13	Wed 2/14
▸ Project Name: Administrative								
<input type="checkbox"/>	Administrative			Actual				
<input type="checkbox"/>	Sick time			Actual				
<input type="checkbox"/>	Vacation			Actual				
▸ Project Name: Architect Series Door PX404 298h 0%								
<input type="checkbox"/>	Development/Implementation	32h	0%	Actual		4h		
<input type="checkbox"/>	Documentation	16h	0%	Actual				
<input type="checkbox"/>	Testing/Verification	250h	0%	Actual				
▸ Project Name: Bentwater Club House 160h								
<input type="checkbox"/>	Document Requirements					2h		
<input type="checkbox"/>	Review and Approve Requirements NEW					2h		

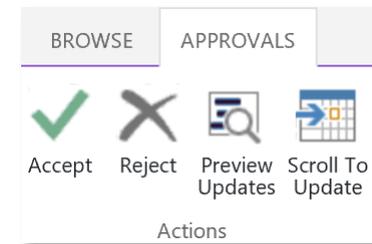
	Task Name	Start ↑	Finish	Remaining Work	% Work Com	Work
▸ Planning Window: In Progress for Current Period						
▸ Project Name: Architect Series Door PX404						
<input type="checkbox"/>	Testing/Verification NEW	11/12/2015	4/5/2018	1,134.99h		1,336h
<input type="checkbox"/>	Documentation NEW	12/19/2016	3/2/2018	294h		298h
<input type="checkbox"/>	Development/Implementation	12/19/2016	1/9/2017	250h	0%	250h
<input type="checkbox"/>	Documentation	6/29/2017	7/11/2017	16h	0%	16h
<input type="checkbox"/>	Development/Implementation	2/12/2018	3/2/2018	28h	12%	32h
▸ Project Name: Bentwater Club House						
<input type="checkbox"/>	Document Requirements	5/2/2016	2/27/2018	158h		240h
<input type="checkbox"/>	Review and Approve Requirements NEW	5/2/2016	2/27/2018	78h	51%	160h
<input type="checkbox"/>	Review and Approve Requirements	1/11/2018	1/25/2018	80h	0%	80h
▸ Project Name: Chocolate Wine						
<input type="checkbox"/>	Development/Implementation	5/2/2016	4/5/2018	304h		410h
<input type="checkbox"/>	Review and Approve Design	5/2/2016	4/5/2018	294h	8%	320h
<input type="checkbox"/>	Review and Approve Design	7/26/2016	8/2/2016	10h	89%	90h
▸ Project Name: Cloudcom						
<input type="checkbox"/>	Testing/Verification NEW	6/9/2017	7/17/2017	22.99h		32h
<input type="checkbox"/>	Review Draft and Design Documentation NEW	6/9/2017	6/26/2017	6.99h	56%	16h
<input type="checkbox"/>	Review Draft and Design Documentation	6/29/2017	7/17/2017	16h	0%	16h
▸ Project Name: Columbus Promo						
<input type="checkbox"/>	Testing/Verification	11/12/2015	1/20/2016	240h	0%	240h

Resources can track % of Work Complete or the Actual Hours per time period.

Time Capture and Approvals

Project Managers can view task updates on the Approvals page. From here they can:

- Accept
- Reject
- Preview Updates



	Approval Type	Name ↑	Project	Update Type	Resource		Total
<input checked="" type="checkbox"/>	Status Update	Document Requirer	Bentwater Club House	Task update	Laura Crawf	Actual	69h

Calls to Action



LinkedIn: www.linkedin.com/company/ppm-works-inc

Our Site: www.ppmworks.com

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

Resource Engagements Toolkit: info@ppmworks.com

Questions: info@ppmworks.com

Calls to Action

- ✓ Complete the survey
- ✓ Receive your Resource Engagement Toolkit today (Email info@ppmworks.com)
- ✓ Get your Resource Engagements ... on
- ✓ Check out our Blogs / webcasts
- ✓ LinkedIn with us and send us any questions

Contact Details

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Toll Free: (888) 858-3060

- Please email questions to info@ppmworks.com



Contact Us

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

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