

Resource Management

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In today's competitive and changing markets, organizations are looking to maximize return on investment (ROI) and drive efficiencies to sustain the business and support future growth. Resources are arguably an organization's most valuable asset and potentially its biggest expense. Proper management and optimal use of resources is key for an organization to realize its business strategy. With intelligent resource management, an organization can develop and retain a world-class workforce.

Adopting best-practice resource management techniques helps organizations accomplish the following:

- **Gain visibility and control using an enterprise resource pool.** With a large number of employees and globally dispersed teams, it can become difficult to keep track of who is available, what they are capable of doing, and where they are located. Centralizing resources and standardizing metadata about the enterprise resource pool is the first step to gaining visibility and control.
- **Proactively compare capacity to demand to maximize resource utilization.** Resource capacity often will determine whether organizations are able to complete strategic projects in a specific planning horizon. Capturing resource requirements early in the project life cycle helps analysts anticipate future demand and proactively schedule projects to maximize resource utilization.
- **Find the right people for the project.** Projects often include globally dispersed teams and require a diverse set of skills. Finding the right people with availability for each project significantly increases the chance of successfully completing the initiative and realizing ROI. Managers need to be able to effectively tap the resource pool to find potential candidates and then quickly see if they are available to join the team.
- **Intuitively manage resource assignments and overcome conflicts.** Managers improve project success rates by effectively managing resource assignments. This means quickly resolving overallocation and reacting to resource conflicts. Managers require tools that help them assess and manage assignments through the project life cycle and easily communicate with team members about assignments.

The Microsoft® Enterprise Project management (EPM) Solution provides a powerful set of capabilities to help analysts and project managers proactively and reactively manage resources across the project life cycle. Centralizing resources in an enterprise resource pool is the first step in helping organizations gain visibility and strategic placement of their employees. The Microsoft® Project Server 2010 Resource Center view consolidates all resources in a central repository and helps project management offices (PMOs) and resource managers standardize the collection of supporting metadata that they can use to effectively tap the resource pool. Creating an inventory of resources, clearly defining and separating working hours from nonworking hours, such as holidays and sick leave, helps analysts determine the organization's overall capacity. The EPM Solution provides a variety of tools—for example, resource plans and project plans—to help organizations capture resource requirements early in the project life cycle. The new capacity planning feature in Project Server 2010 helps analysts effectively compare

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resource demand to capacity, and to proactively reschedule new projects to maximize resource utilization. The Resource Center view provides a flexible interface for searching the enterprise resource pool to find the right people with availability to work on each project. The new Team Planner tool in Microsoft® Project Professional 2010 helps project managers visually manage project-level resource assignments, quickly identify and resolve overallocation, and easily substitute resources to overcome conflicts that could affect project delivery. Team members can conveniently pick up assignments in the Project Server 2010 Tasks view, or they can access their tasks through Microsoft Outlook®. The EPM Solution provides a comprehensive resource management system to help organizations better manage their most important asset.

Define Resources Using a Central Enterprise Resource Pool

Project Server 2010 includes an enterprise resource pool that provides a centralized collection of all resources and related information, so managers have enhanced visibility and control across the resource pool (see Figure 1). Administrators can capture all named resources in a single location and standardize the collection of associated metadata. The metadata represents discrete resource properties—skills, a resource's level in the resource breakdown structure, geographic location, and billing rates—that managers can effectively use to tap the resource pool. With new Departmental fields, resources can be associated with a business unit to ensure that managers can filter and sort resources by department. In addition, administrators can create generic resources that can be used to capture resource requirements at the skill level, such as *developer* or *analyst*, early in the project life cycle. Resources can also be assigned to teams for more flexibility; tasks assigned to a team can be completed by any resource within that team.

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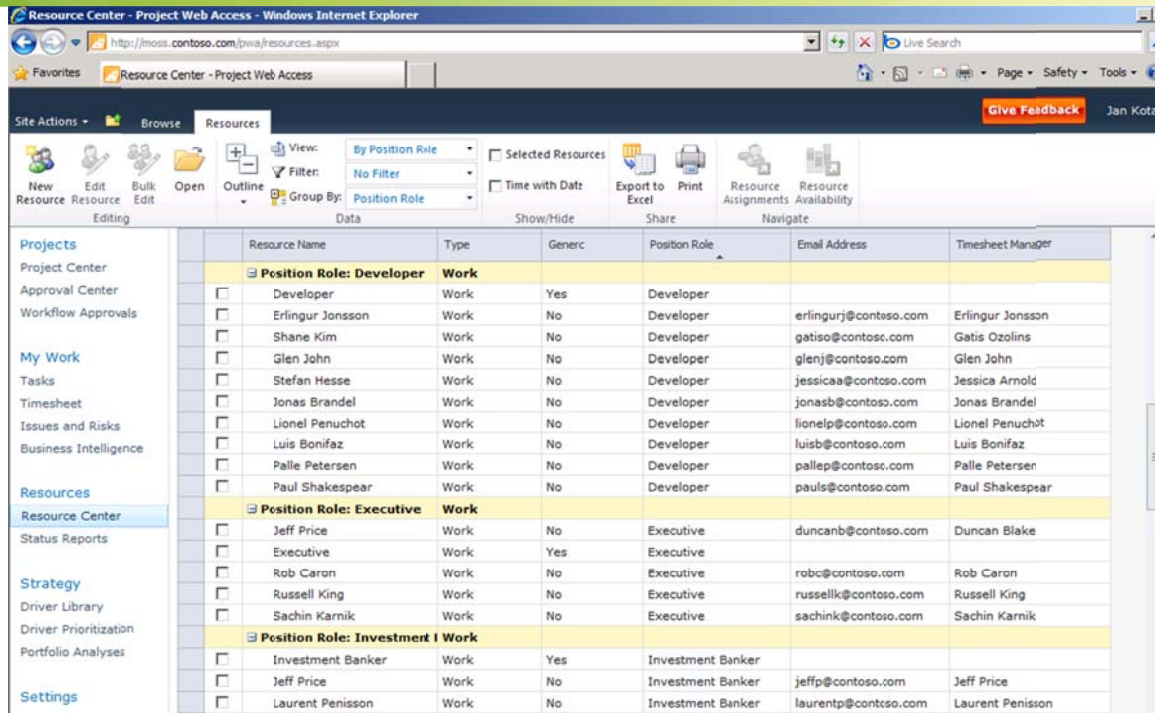


Figure 1. Project Server 2010 – Resource Center view

Capturing all resources in a central location helps PMOs and resource managers quickly assess overall capacity and better understand the employee skills that are available to them to use throughout the organization.

People are not the only type of resource that needs to be managed. In addition to work resources, the Microsoft EPM Solution supports the management of costs and material resources—consumable resources such as concrete and lumber. For complete asset management, organizations can create and manage data for inanimate resources, including machinery, equipment, hardware, and facilities. Managers can apply multiple rate tables to these resources to model purchasing versus rental scenarios, for example.

Using Project Server Interface (PSI), the Project Server 2010 application programming interface (API), the EPM Solution can connect with line-of-business (LOB) applications to gather up-to-date resource information from the chosen system of recording it. To simplify and automate the creation of the resource pool, Project Server 2010 can sync with Active Directory® directory services or connect with LOB systems. This level of automation saves time and simplifies resource management to create an integrated work management platform.

Capture Resource Requirements for Capacity Planning

Project Server 2010 demand management capabilities help ensure that resource requirements are captured early in the project life cycle, so they provide visibility on future demand. Resource

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requirements can be captured at the resource name level, skill level (generically), or at the team level using a Resource Plan (see Figure 2) or by assigning resources directly to tasks in the Project Web App schedule or in Project Professional 2010. Administrators can also create best-practice project plan templates that include prepopulated resource assignments.

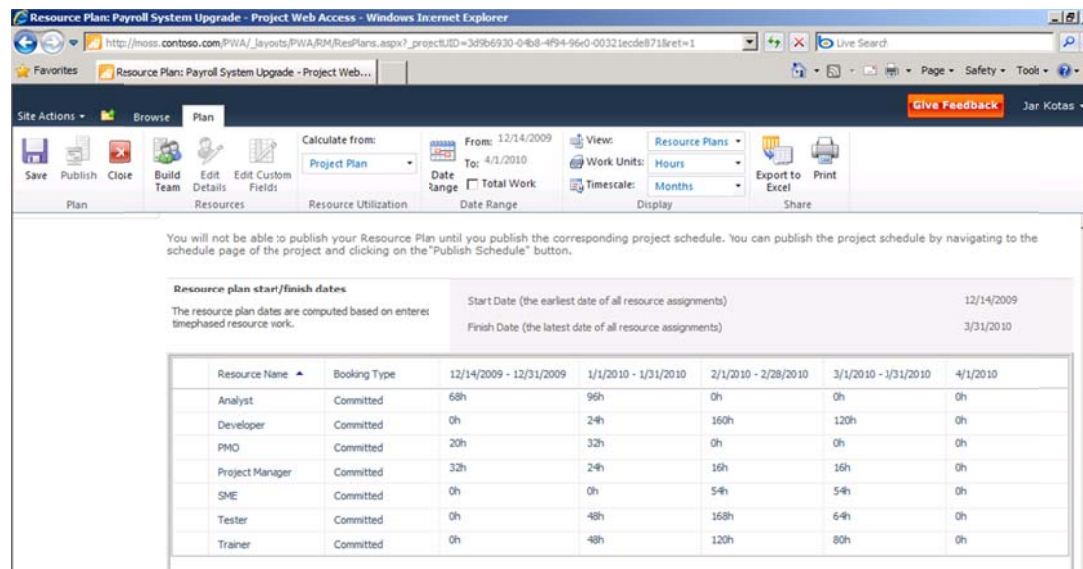


Figure 2. Project Server 2010 – Resource Plan

PMOs can use the new capacity planning module in Project Server 2010 to proactively manage resources at the skill level and to assess whether the organization has the capacity to undertake a proposed project portfolio. The capacity planning module helps analysts compare resource requirements and availability data to identify resource surpluses and deficits across the planning horizon. Analysts can then use this information to distribute work by rescheduling projects within the horizon to maximize resource use. For more information about the Project Server 2010 capacity planning capabilities, see the [Portfolio Selection and Analytics](#) section.

Quickly Find the Right People to Put to Work

Project Server 2010 and Project Professional 2010 include tools that help make it easy to find the right people within the organization for each project. Using the Project Server 2010 Resource Center or Build Team views, managers can effectively tap the resource pool by using powerful views or create filters to search for the right people based on geography, skill, or other variables (see Figure 3).

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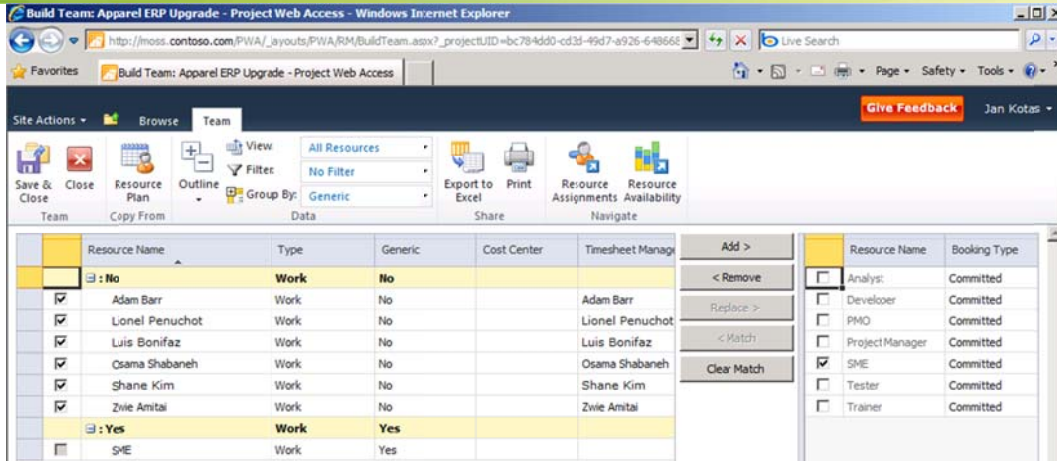


Figure 3. Project Server 2010 – Build Team view

After managers have identified potential candidates, they can use the Resource Assignment and Resource Availability views to locate the resources who are available to work on their projects (see Figure 4). These flexible views let managers include multiple resources, change the date range and time granularity, and see other projects that resources are working on during a given period of time.

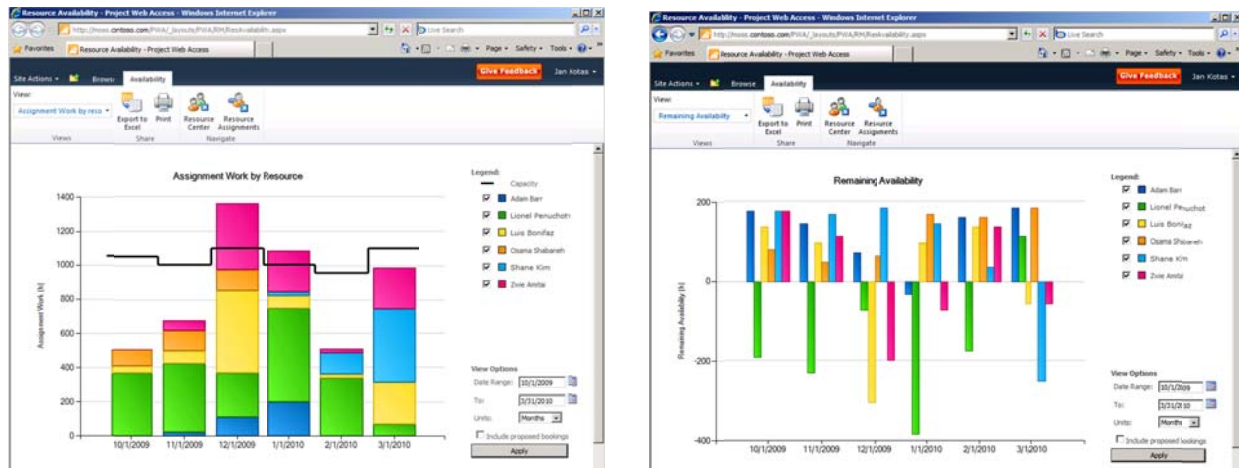


Figure 4. Project Server 2010 – Resource Assignment and Resource Availability views

With the right resources identified, managers can engage the capabilities of the Build Team view to add resources to their project and to specify whether the booking is proposed or committed.

Visually Manage Resource Assignments

Managing project-level resource assignments can be a challenge that persists throughout a project life cycle. Resource and project managers require powerful tools to help them easily assign and communicate tasks, quickly resolve overallocations, and respond to resource conflicts.

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The new Team Planner view in Project Professional 2010 offers a resource-centric view that helps managers visually manage project-level resource assignments (see Figure 5). Team Planner gives managers a complete picture of all assignments associated with a project. In addition, managers can intuitively drag tasks between resources. As demonstrated in Figure 5, with the easy-to-use interface in Team Planner, managers can quickly identify unassigned tasks in the lower half of the view, find resources that have availability, and simply move tasks to the right person. This intuitive, resource-centric tool visually highlights resource overallocation, represented by red bars that indicate overlapping tasks as shown in Figure 5. Managers can manually resolve scheduling conflicts, or rely on the leveling capabilities of Project Professional 2010 to automatically fix the issue. Team Planner also visually highlights when a resource is assigned to another project and allows the project manager to look at the details of the competing project to better understand the impact on the resource's time.

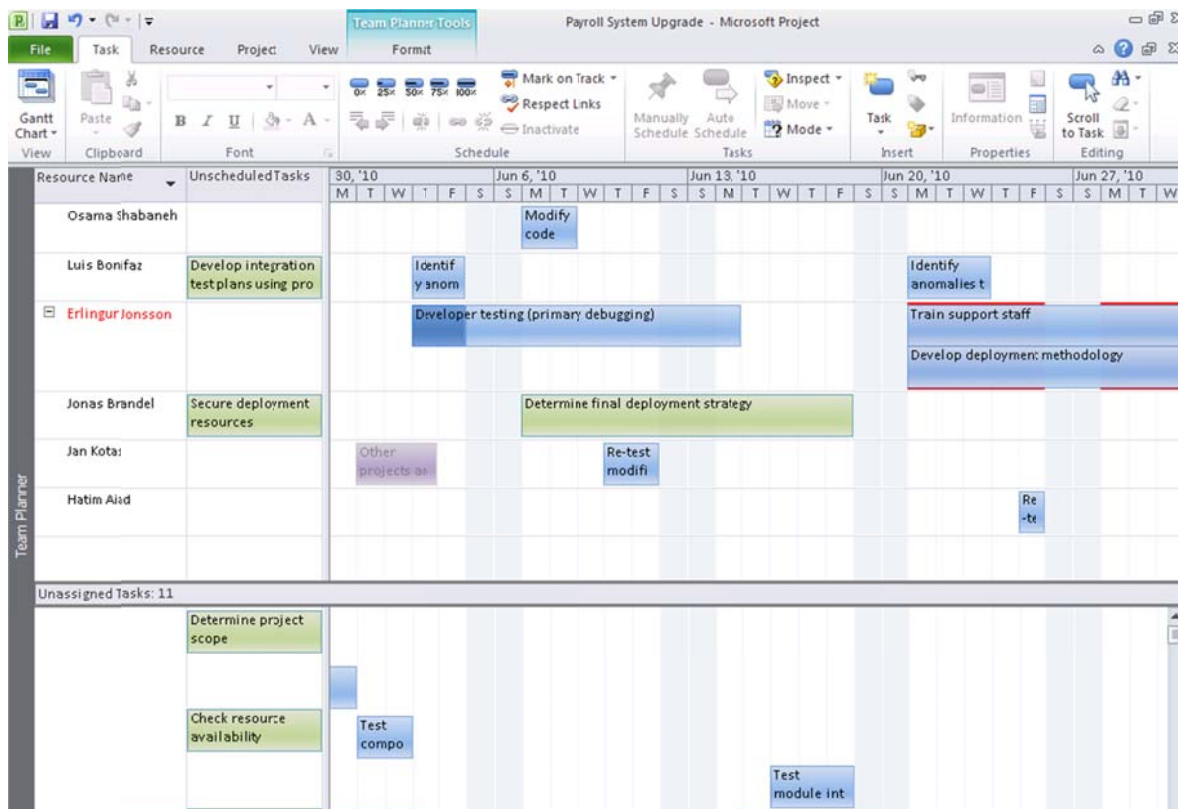


Figure 5. Project Professional 2010 – Team Planner view

The Team Planner view also provides mouse-triggered, context-sensitive dialog boxes that display useful information about tasks, including start and end dates, work remaining, and percent complete. Tasks appear in different colors to denote percent complete (see Figure 6).

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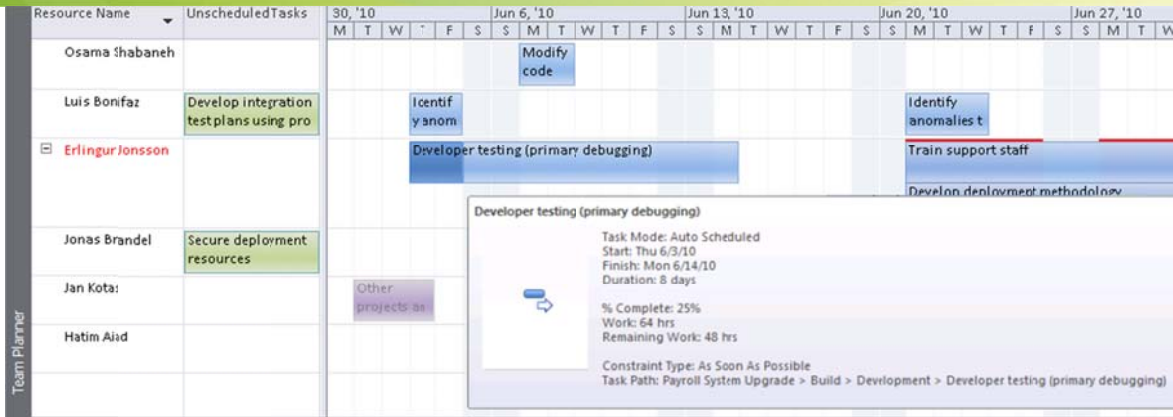


Figure 6. Project Professional 2010 – Mouse-triggered, contextual dialog boxes appear for each task

The EPM Solution simplifies communication about resource assignments to ensure that all team members are aware of their designated activities. Resource assignments are displayed by time period in the team member’s Tasks view in Project Server 2010 (see Figure 7). The Tasks view provides one-stop-shopping for all assignments for each team member, and is where a resource can provide time and status updates or reassign tasks if they do not have the bandwidth to complete tasks assigned to them. Project Server 2010 also connects with Exchange Server to ensure that team members can receive and update their project assignments as tasks in Microsoft Outlook® or Outlook Web App.

For more information about task assignments, see the [Time and Task Management](#) section.

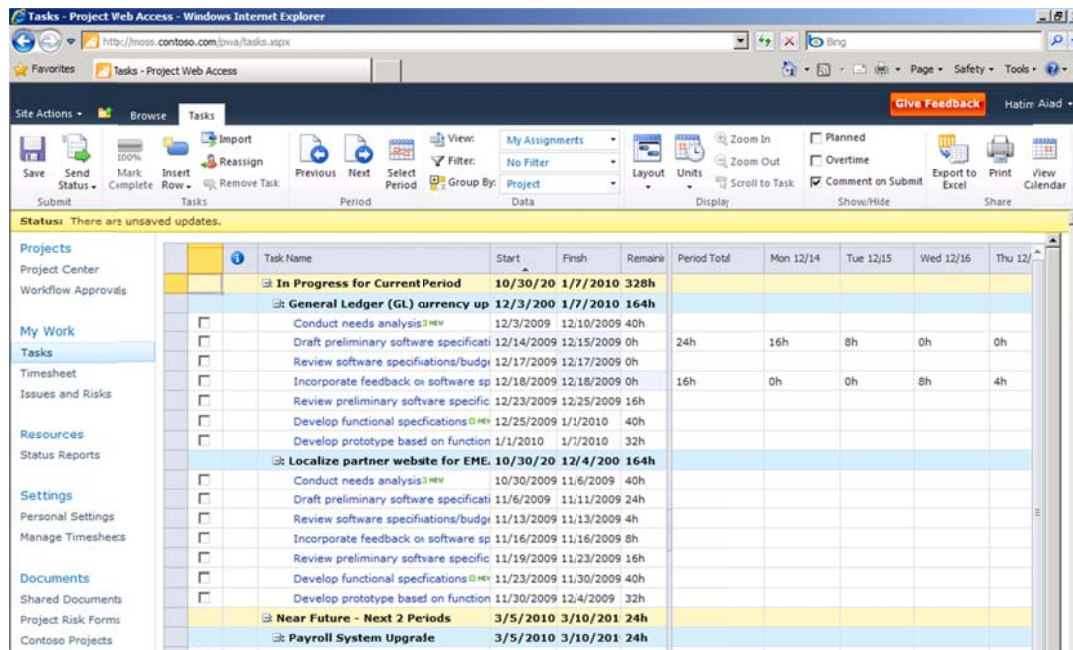


Figure 7. Project Server 2010 – Tasks view

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Additional Resources

Additional Resources

For expanded help, step-by-step guides, and video training on how to get the most of Project Server 2010 and the Microsoft EPM Solution, visit [Microsoft Project](#).

To learn more about Project 2010 and the Microsoft EPM Solution, refer to the following list of related links:

Product information

[MSDN Project 2010 Beta](#)

[Project 2010 Blog](#)

[Project Team Blog](#)

Interactive content - Videos & Sessions & Webcast

[Project 2010 Video Showcase](#)

[Enterprise Project Management Microsoft Events](#)

[Project Developer Center](#)

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Project Professional 2010 and Project Server 2010 Demo Image:

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