Overview

This Job Aid defines the steps to follow when creating and maintaining the resources who will be allocated to projects, also referred to as **bookable resources**.

There are three (3) types of bookable resources available:

- **Named resources** are licensed Microsoft 365 users. Typically, most of the project team members will be named resources. It is important to note that named resources have capacity and demand management and can be assigned to a project task. Other organisational users, typically business unit and executive users can access and view project data but do not need to be defined as a resource unless they are expected to be part of the team and assigned to complete project tasks.

- **Generic resources** are typically used during proposals and in the initiating stage of projects to define high-level resource requirements, and therefore confirm availability using the resource plan. Then in the planning stage where project plans (*schedules*) are developed, generic resources are replaced by named resources and assignment requirements are refined, i.e., team members are identified and committed to the project. They may also be assigned an average or blended rate, likely by role or skill, to calculate initial project costs during resource planning.

  Important: While demand and capacity management are driven by each named resource, typically capacity is managed at the role level where project assignments are balanced across all the resources who fulfill a specific role.

- **External resources** allow you to assign project tasks to team members outside your organisation, but capacity and demand management is <u>not</u> available for them. These can also include external resources from the synchronised external projects which should be mapped to a named resource as a matter of best practice to ensure that all the work across all external execution tools and are consolidated in the *Insights* reports.

Using the **Resources** list, you can perform the following actions as a **Resource Manager** or **Admin User**:

1. **Create new bookable resources**
2. **Update existing bookable resource information**

Important: Deleting the resource records is an action that <u>cannot</u> be undone.
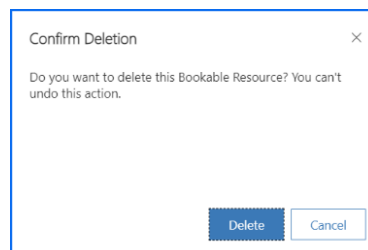
Create new bookable resources

👤 Resource Manager, Administrator   🔧 Resources > Resources > Resources

1. **CREATE GENERIC RESOURCES INDIVIDUALLY**

a. Ensure that you are in the **Resources** area and click **Resources** in the **Resources** section.

b. In the default **Active Bookable Resources** view, click the **+ New** button from the ribbon.

c. In the **General** section of the **New Bookable Resource** form, set the **Resource Type** to **Generic** from the drop-down menu.

d. Next, type in the resource name that will be used to identify this primary role in the **Name** field.

   Tip: Depending on your accounting policies, assigning a **Line Manager** and **Rates** to generic resources allows your organisation to facilitate effective resource management and cost planning.

e. Click the **Save & Close** button from the ribbon to add the generic resource to the Active Bookable Resources list.

2. CREATE NAMED RESOURCES INDIVIDUALLY

a. Ensure that you are in the **Resources** area and click **Resources** in the **Resources** section.

b. In the default **Active Bookable Resources** view, click the **+ New** button from the ribbon.

c. In the **General** section of the **New Bookable Resource** form, set the **Resource Type** to **Named** from the drop-down menu.

d. Type the resource's username in the **User** people picker field to search for and select the organisational user account you wish to add to the list of bookable resources.

e. Next, type in the name that will be used to identify this resource in the **Name** input field.

   Tip: While this display name can be identical to the organisational username, you can also change it as needed to make it easy to search for and identify team members.

f. Optionally, add the resource to the appropriate resource department using the **Department** drop-down menu as it is used in reporting and dashboards.

g. Associate a primary role to the named resource from the list of generic resources using the **Primary Role** drop-down menu.

    Important: Depending on your organisational rules, it is a best practice to associate each named resource with a primary role to support effective capacity and demand management based on roles.

h. In the centre column, search for and select the organisational user who will be the line manager (*reviewing and approving any resource requests*) for the named resource in the **Line Manager** people picker field.

i. If your organisation is using the *Timesheet* functionality, search for and select the organisational user who will be the timesheet manager (*reviewing and approving timesheets*) for the named resource in the **Timesheet Manager** people picker field.

j. Optionally, fill out the **Location** input field and set the resource's local time zone using the **Time Zone** drop-down menu as they can be used in reporting and dashboards.

k. Leave the **Start Date** and **End Date** fields blank <u>except</u> in the following scenarios:

    - If the resource is being created earlier than their start date, to ensure that resource requests cannot be requested for time before their availability, set the **Start Date** accordingly.

    - If a date is known for when the resource will no longer be available for project allocation, set the **End Date** accordingly.

l. In the final column, select the appropriate pre-configured calendar which reflects the availability of this resource for project work from the **Enterprise Calendar** drop-down menu.

Tip: Unless the default calendar is customised in your organisation's solution, it reflects the standard Monday to Friday, 8-hour workdays. Your organisation may have also created additional enterprise calendars that reflect part-time work, region-specific public holidays and/or organisation-specific non-working days.

m. Set the percentage of the time the named resource should be available for project assignments in the **Target Utilisation** input field (**recommended**).

n. Click the **Save** button from the ribbon to keep the changes applied to **General** section of the new bookable resource form.


Important: Depending on organisational project accounting policies, you can define both **cost** and **sell** rates for each resource which can be used for project financial reporting. If your organisation reports on project costs, revenue, and profit, continue with the following steps in the section below:

3. ASSIGN COST AND SELL RATES TO RESOURCES INDIVIDUALLY

a. Navigate to the **Rates** tab and click the **+ New Resource Cost Rate** button in the **Cost Rates** section.
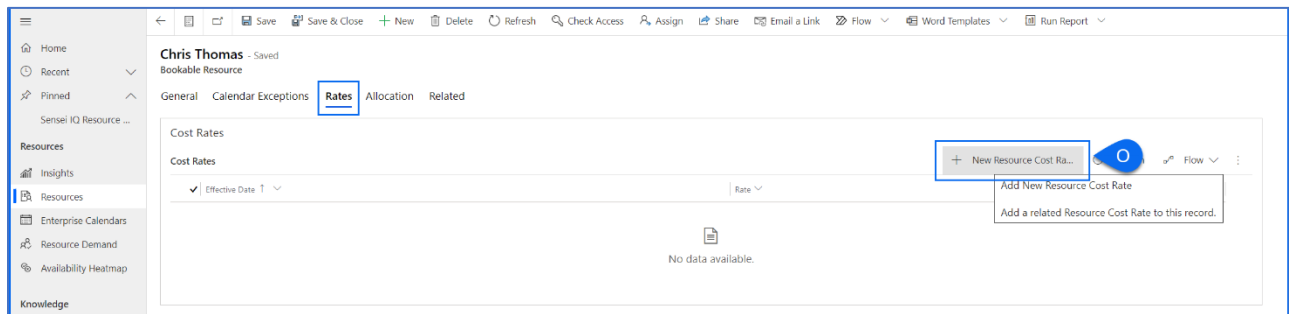
b. In the **Quick Create: Resource Cost Rate** form, set the **Effective Date** for this rate and then enter the **Rate**.

Tip: The **Bookable Resource** name field is automatically filled in the form.

c. Click the **Save and Close** button in the form to keep the changes applied to the **Quick Create: Resource Cost Rate** form.
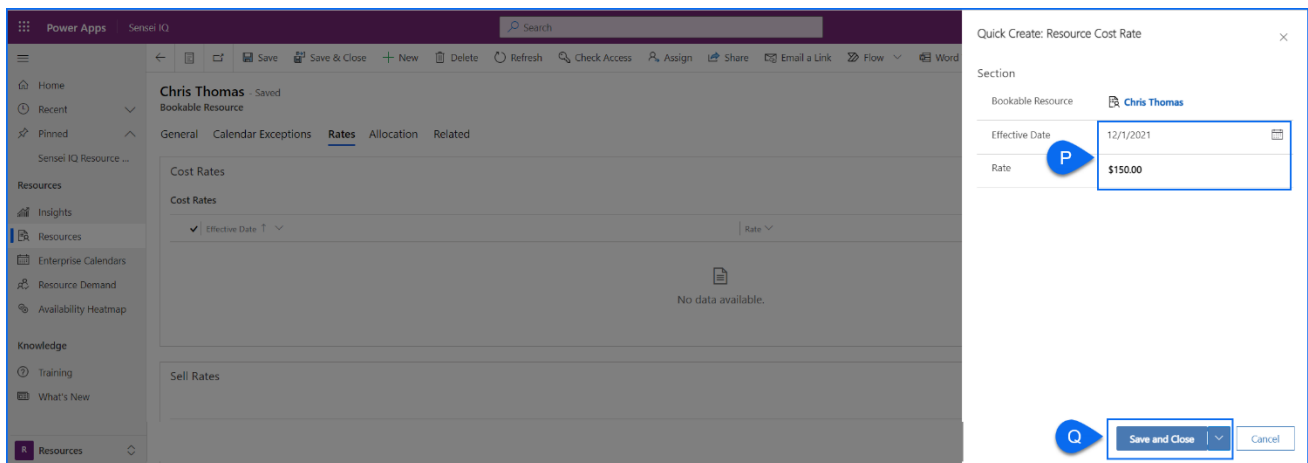
d. Once a cost rate is added, click the **+ New Resource Sell Rate** button in the **Sell Rates** section.

e. In the **Quick Create: Resource Sell Rate** form, set the **Effective Date** for this rate and then enter the **Rate**.

Tip: The **Bookable Resource** name field is automatically filled in the form.

f. Click the **Save and Close** button in the form to keep the changes applied to the **Quick Create: Resource Sell Rate** form.

g.

Important: While your organisation will have processes for defining resource cost rates, we want to remind you that the **Cost rates** maintained will be visible for all users, so therefore, resource cost rates should <u>not</u> be based on a specific individual's salary and should be an average or blended rate, likely by role or skill, to ensure confidentiality of sensitive information. **Sell rates**, on the other hand, maintained for a resource will apply to all projects that the resource is assigned to, but can be overridden at a project level as needed. Your organisation may have a blended rate card to work from when updating these values.

Tip: Recognising that both the **Cost rates** and **Sell rates** can change over time, and at different times, you can easily define additional new rates and the effective date for each new rate by repeating the same process described above.

h. Finally, click the **Save and Close** button from the ribbon to keep the changes applied to the resource record.

4. CREATE EXTERNAL RESOURCES INDIVIDUALLY

a. Ensure that you are in the **Resources** area and click **Resources** in the **Resources** section.

b. In the default view **Active Bookable Resources**, click the **+ New** button from the ribbon.

c. In the General section of the **New Bookable Resource** form, set the **Resource Type** to **External** from the drop-down menu.

d. Follow the same steps described in the above section **2. Create named resources individually** to add an external resource to the **Active Bookable Resources** list.

Tip: The **User** people picker field disappears from the **New Bookable Resource** form when the **Resource Type** is set to **External** because external resources __cannot__ be associated to an organisational user account.

5. IMPORT BOOKABLE RESOURCES USING AN EXCEL CSV FILE

Important: If a user is granted access to the solution, your organisation's Azure Active Directory will synchronise their user information into the environment where it becomes visible to the resourcing module as a *system user*.

A bookable resource can then be created from that system user individually as described in the previous sections. Creating a bookable resource places load on the system and accumulates **Data verse quota costs per resource** and hence should **not** be done speculatively/automatically for thousands of resources **even if** there is a known mechanism to automatically populate the list of bookable resources through Active Directory synchronisation powered by a custom Power Automate flow. You can follow these steps instead to import bookable resources in bulk as an alternative method to creating them individually as described in the previous sections.

a. Regardless of the area you are currently in, click the **Advanced Find** filter button from the top navigation bar.

b. In the **Advanced Find** dialog box, select Users from the Look For drop-down menu.

c. Next, select **Enabled Users** from the **Use Saved View** drop-down menu.

d. Click the **Results** button from the **Advance Find** ribbon.
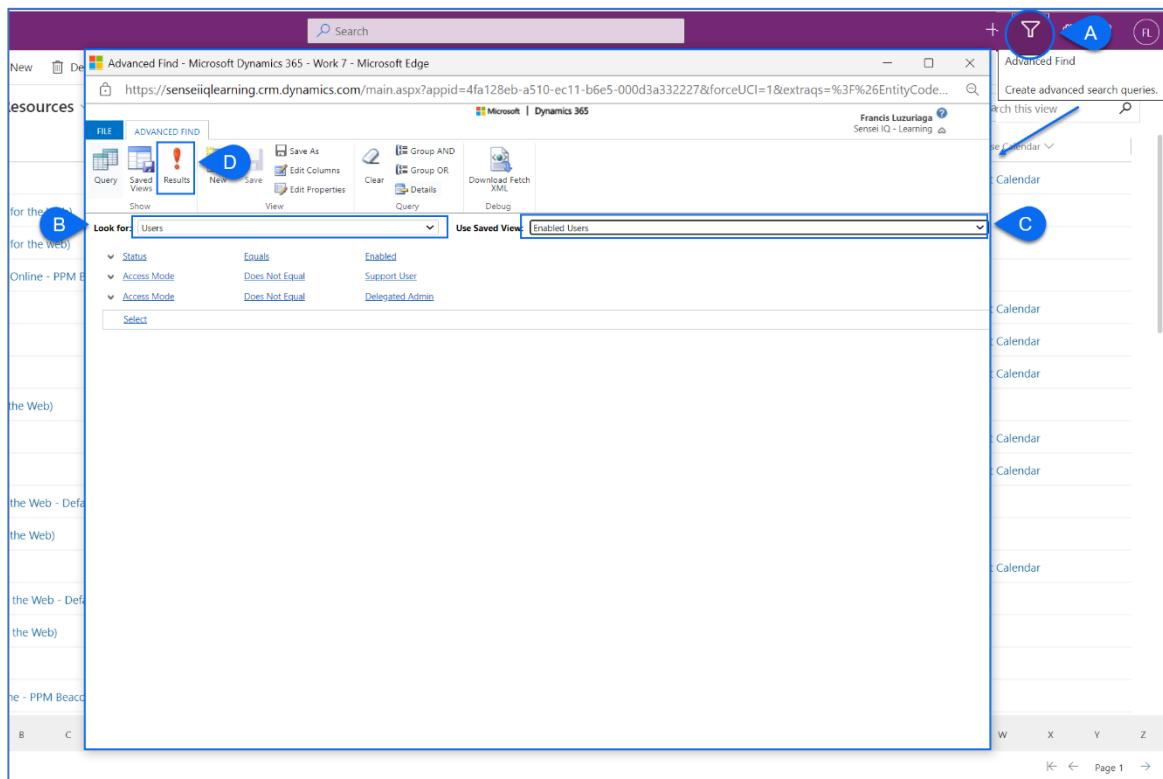
e. Next, click the **Export Users** button from the **Users** ribbon.
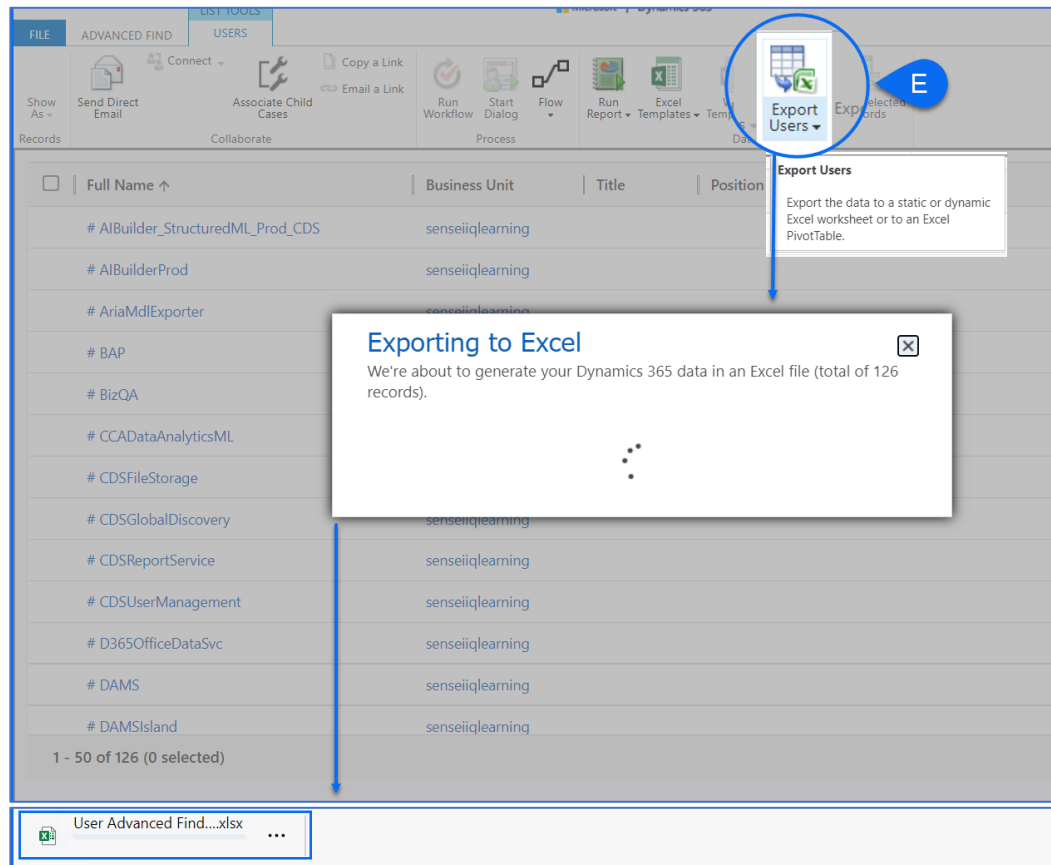
Important: This is a critical step to ensuring that you obtain the **Personal User Identification Number (PUID)** of the **enabled users** (also referred to as **licensed users**) from the Azure Active Directory of your organisation that can be associated to the named resource records accordingly.

f.   Locate and open the export file using the Microsoft Excel desktop application then click **Enable Editing** from the yellow status bar across the top of the table.
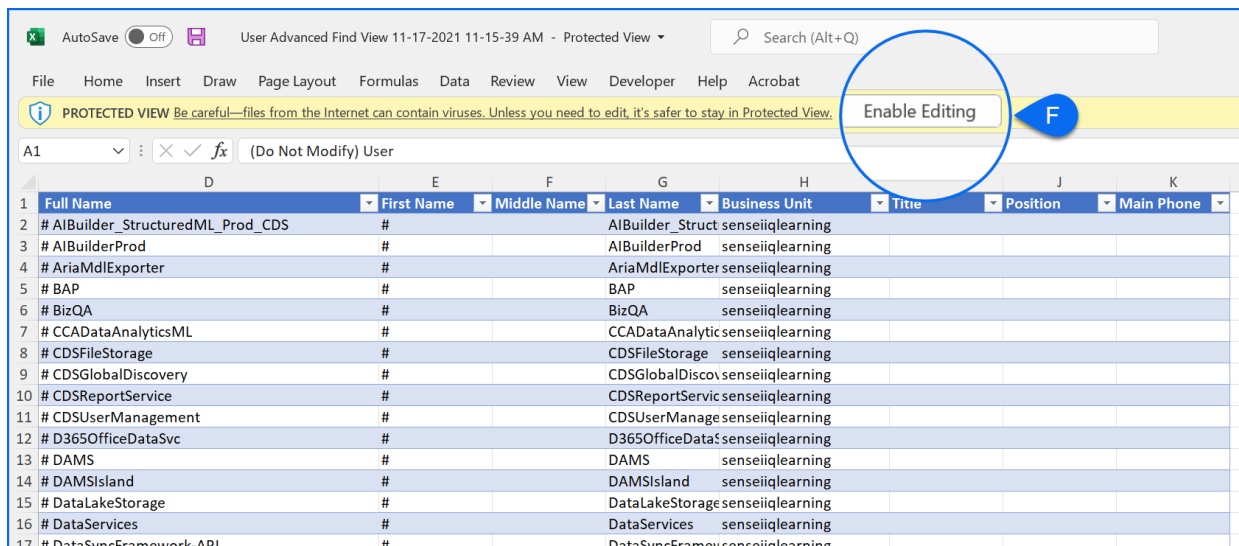
g. Right-click on the table and select **Unhide** from the mini toolbar to display the **(Do Not Modify) User** column that contains the **PUID** of enabled users in your organisation's Azure Active Directory.

h. Prepare the table for data import through a combination of removing unnecessary rows, renaming existing columns, hiding unnecessary columns, and creating additional columns that should directly map to existing

bookable resource input fields and contain data that <u>exactly</u> matches the existing lookup values, format and validation criteria configured in the solution.

Important: Only **hide** the unnecessary columns from the table and do <u>not</u> remove any column as it could cause an error during the import process later due to missing information.

Tip #1: Unless your organisation has an existing data import template, the table for data import in your source file should look something like the below image:

	(Do Not Modify) User	Resource Name	Resource Type	Line Manager	Primary Role	Enterprise Calendar
2	dcad525d-a610-ec11-b6e6-000d3a331f92	Albert Connell	Named	Francis Luzuriaga	Business Analyst	Default Calendar
3	31844e57-a610-ec11-b6e6-000d3a331f92	Andy Neumann	Named	Terry Kneeburg	Project Manager	Default Calendar
4	5d844e57-a610-ec11-b6e6-000d3a331f92	Bill Collett	Named	Francis Luzuriaga	Developer	Default Calendar
5	f2834e57-a610-ec11-b6e6-000d3a331f92	Bill Speker	Named	Terry Kneeburg	DBA	Default Calendar
6	d9ad525d-a610-ec11-b6e6-000d3a331f92	Bill Tibbetts	Named	Terry Kneeburg	Infrastructure Developer	Default Calendar
7	7c844e57-a610-ec11-b6e6-000d3a331f92	Bob Banker	Named	Carl Executive	Network Architect	Default Calendar
8	8cbbf3f1-2845-ec11-8c62-000d3a3b2898	Bob Brenly	Named	Carl Executive	Business Analyst	Default Calendar
9	fd219b49-a610-ec11-b6e6-000d3a3327c3	Bob Melvin	Named	Carl Executive	Marketing	
10	2aae525d-a610-ec11-b6e6-000d3a331f92	Bret Prinz	Named	Francis Luzuriaga	Consultant	Default Calendar
11	1c844e57-a610-ec11-b6e6-000d3a331f92	Brice Center	Named	Francis Luzuriaga	Project Manager	Default Calendar
12	d2ad525d-a610-ec11-b6e6-000d3a331f92	Carl Executive	Named	Deirdre Rogusky	Process Engineer	Default Calendar
13	b9844e57-a610-ec11-b6e6-000d3a331f92	Chad Olson	Named	Francis Luzuriaga	Procurement Specialist	Default Calendar
14	005fcefa-1827-ec11-b6e5-0022480acf24	Chad Olson	Named	Deirdre Rogusky	Product Tester	Default Calendar
15	e0834e57-a610-ec11-b6e6-000d3a331f92	Chris Thomas	Named	Deirdre Rogusky	Marketing	Default Calendar
16	74844e57-a610-ec11-b6e6-000d3a331f92	Cindy Process	Named	Steve Caseley	Business Analyst	Default Calendar
17	dead525d-a610-ec11-b6e6-000d3a331f92	Connie Campaign	Named	Steve Caseley	Infrastructure Developer	Default Calendar
18	b0844e57-a610-ec11-b6e6-000d3a331f92	Craig Counsell	Named	Steve Caseley	Developer	Default Calendar
19	95844e57-a610-ec11-b6e6-000d3a331f92	Dan MacDonald	Named	Steve Caseley	System Architect	Default Calendar
20	89844e57-a610-ec11-b6e6-000d3a331f92	Deb Thomsen	Named	Steve Caseley	Technician	Default Calendar
21	53844e57-a610-ec11-b6e6-000d3a331f92	Deirdre Rogusky	Named	Steve Caseley	Technician	Default Calendar
22	ffad525d-a610-ec11-b6e6-000d3a331f92	Diane Masters	Named	Steve Caseley	System Architect	Default Calendar
23	25844e57-a610-ec11-b6e6-000d3a331f92	Doug Brown	Named	Steve Caseley	Consultant	Default Calendar
24	01ae525d-a610-ec11-b6e6-000d3a331f92	Earl Redding	Named	Steve Caseley	Consultant	Default Calendar
25	05ae525d-a610-ec11-b6e6-000d3a331f92	Eddie Mason	Named	Andy Neumann	Consultant	Default Calendar
26	a4834e57-a610-ec11-b6e6-000d3a331f92	Emma Admin	Named	Andy Neumann	Business Analyst	
27	56b90d16-6b12-ec11-b6e6-000d3a331f92	Francis Luzuriaga	Named	Andy Neumann	Business Analyst	Default Calendar
28	45844e57-a610-ec11-b6e6-000d3a331f92	Fred Sample	Named	Andy Neumann	Consultant	Default Calendar
29	035fcefa-1827-ec11-b6e5-0022480acf24	James Boman	Named	Francis Luzuriaga	DBA	Default Calendar
30	47229b49-a610-ec11-b6e6-000d3a3327c3	Janus Lund	Named	Francis Luzuriaga	Network Designer	Default Calendar
31	30ae525d-a610-ec11-b6e6-000d3a331f92	Jason Huebner	Named	Francis Luzuriaga	DBA	Default Calendar
32	f69db549-a610-ec11-b6e6-000d3a331f92	Jennifer Welter	Named	Francis Luzuriaga	Marketing	Default Calendar
33	42834e57-a610-ec11-b6e6-000d3a331f92	Jerry Colangelo	Named	Francis Luzuriaga	DBA	Default Calendar
34	3fae525d-a610-ec11-b6e6-000d3a331f92	Joe DeMaegd	Named	Andy Neumann	Technical Writer	Default Calendar

User Advanced Find View

Tip #2: You can also include additional generic resources based on the primary roles required in your organisation to the source file by adding rows to the table and filling the **Resource Name** column with the primary role names and the **Resource Type** column with the **Generic** value.

	(Do Not Modify) User	Resource Name	Resource Type	Line Manager	Primary Role	Enterprise Calendar
52	291ddc00-1927-ec11-b6e5-0022480acf24	Tim Clark	Named	Deirdre Rogusky		
53	a0844e57-a610-ec11-b6e6-000d3a331f92	Ty Wheeler	Named	Deirdre Rogusky		
54	1aae525d-a610-ec11-b6e6-000d3a331f92	Walt Nickel	Named	Deirdre Rogusky		
55		Business Analyst	Generic			
56		Consultant	Generic			
57		DBA	Generic			
58		Developer	Generic			
59		Infrastructure Developer	Generic			
60		Marketing	Generic			
61		Network Architect	Generic			
62		Network Designer	Generic			
63		Process Engineer	Generic			
64		Procurement Specialist	Generic			
65		Product Tester	Generic			
66		Project Manager	Generic			
67		System Architect	Generic			
68		System Tester	Generic			
69		Technical Writer	Generic			
70		Technician	Generic			
71						

i.   Once the table for data import is ready, save the source file in **CSV (Comma-separated Values)** format in your local computer and provide a unique file name for ease of file search later in the import process.
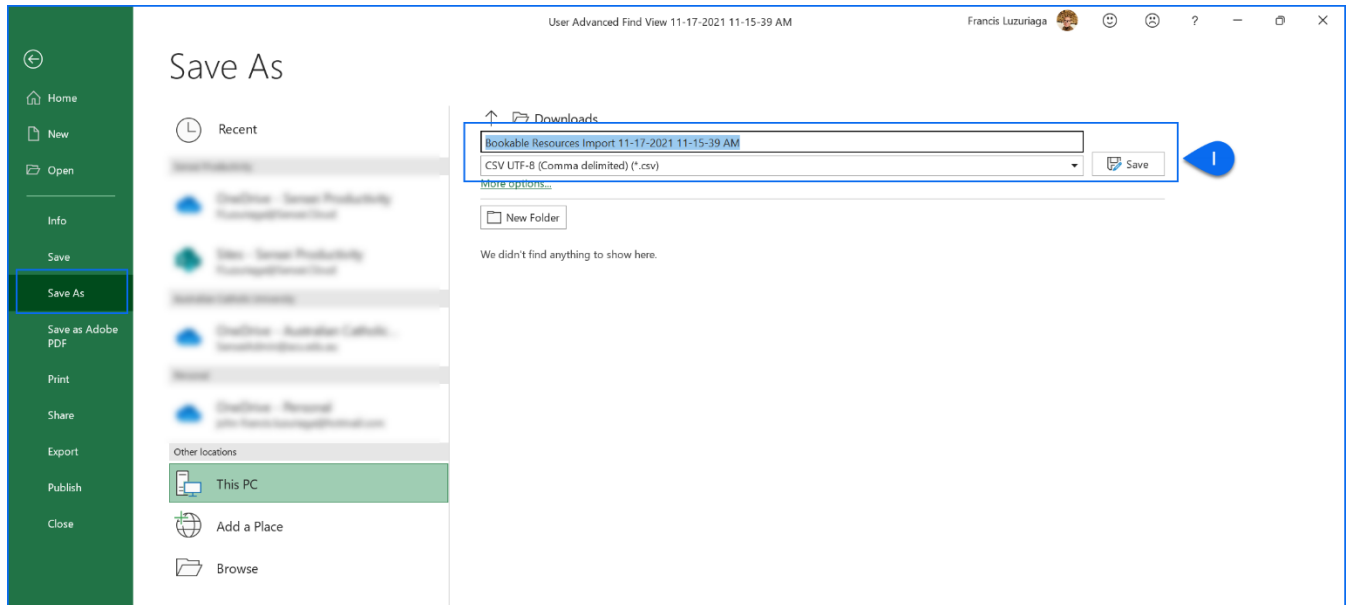
j.   Back to the Resources page, click the chevron arrow next to the **Import from Excel** button in the ribbon and select the **Import from CSV** option from the menu.
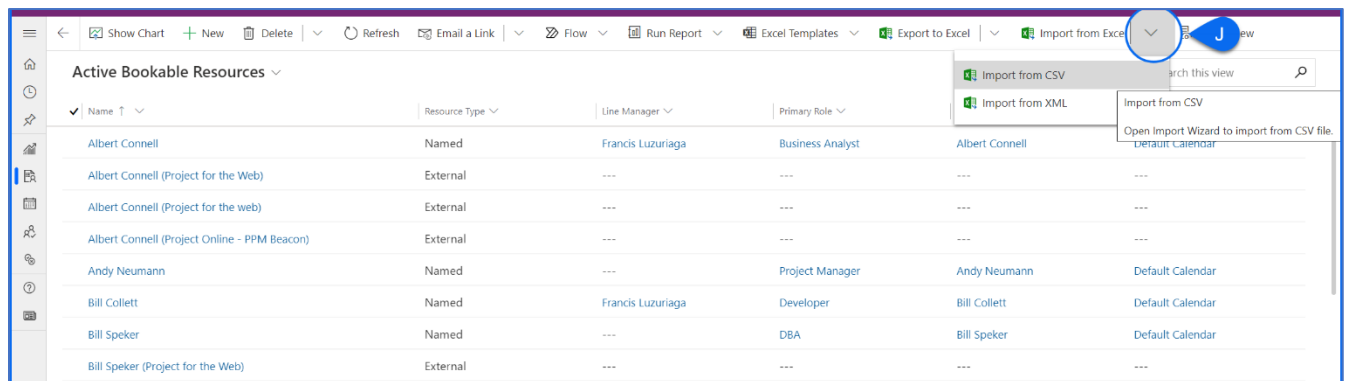
k.   From the **Import from CSV** pane on the right-hand side of the screen, click the **Choose File** button to locate and select the CSV source file to upload from your local computer.

l.   Click the **Next** button from the **Import from CSV** pane to initiate the data mapping review process.

m. Do <u>not</u> modify the pre-set options in the next page and keep the **Allow Duplicates** toggle option under the **Duplicate Data Settings** section set to **No**, then click the **Review Mapping** button.

n. In the next page, provide a unique name for the data mapping.

o. Map each column from the source file to an existing entity field and set the other fields to **Ignore**.

   Important: Particularly for the **(Do Not Modify) User** source field, selecting the **User (Lookup)** entity field then the **User PUID** value from the **Lookup reference for field** section allows you to map the bookable resources (named) to the appropriate enabled users in your organisation's Azure Active Directory.

p. Once the mapping is complete, click the **Finish Import** button.

Important: In the next page, you can either click the **Done** button and wait for the background process to complete or click the **Track Progress** button to open the **Imports** page in a separate window. Clicking the name of the import activity in the **Import Name** column allows you to identify any partial failures or errors in the mapping that may require your immediate attention before making another attempt to repeat the import process.
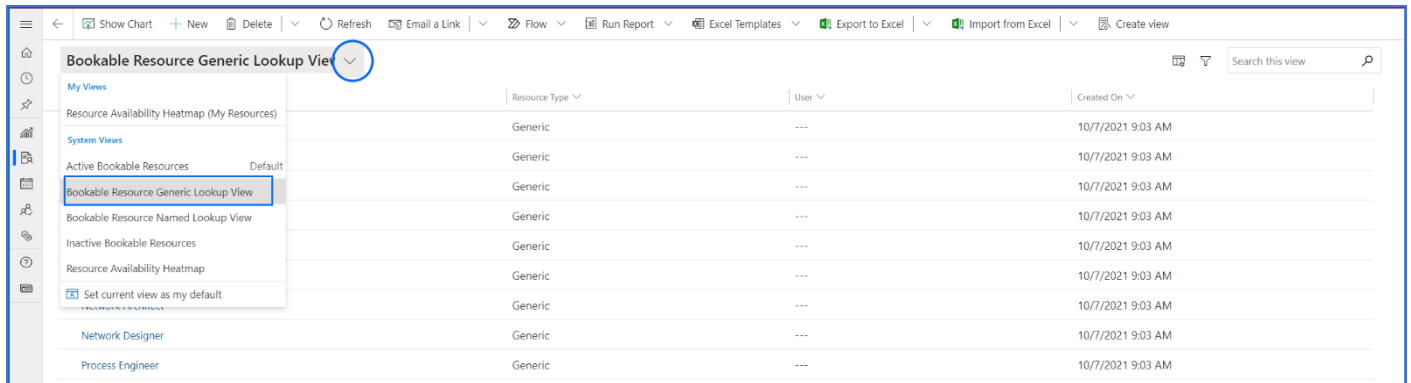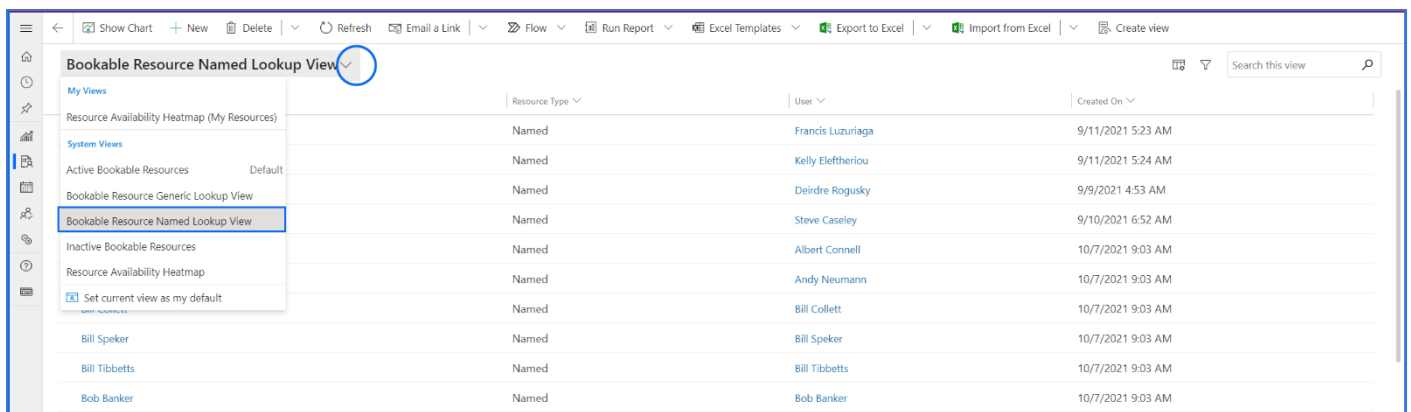

q. Finally, apply either the **Bookable Resource Generic Lookup View** or **Bookable Resource Named Lookup View** in the **Resource** page to validate the success of the import process.

Update existing bookable resource information

👤 Resource Manager, Administrator   🔧 Resources > Resources > Resources

1. **UPDATE EXISTING RESOURCES INDIVIDUALLY**

   a. Ensure that you are in the **Resources** area and click **Resources** in the **Resources** section.

   b. In the default **Active Bookable Resources** view, type the name of the resource you wish to update using the **Search this view** box.

   c. Click the name of the resource in the **Name** column from the results displayed on the page.
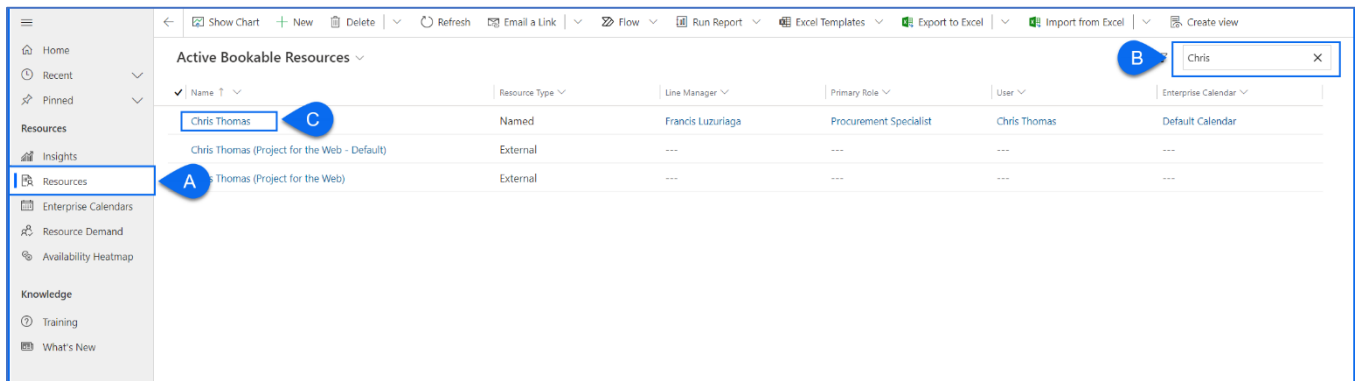
d. Once the **Bookable Resource** record is open for editing, update the relevant information accordingly.

e. Finally, click the **Save and Close** button from the ribbon to keep the changes applied to the resource record.
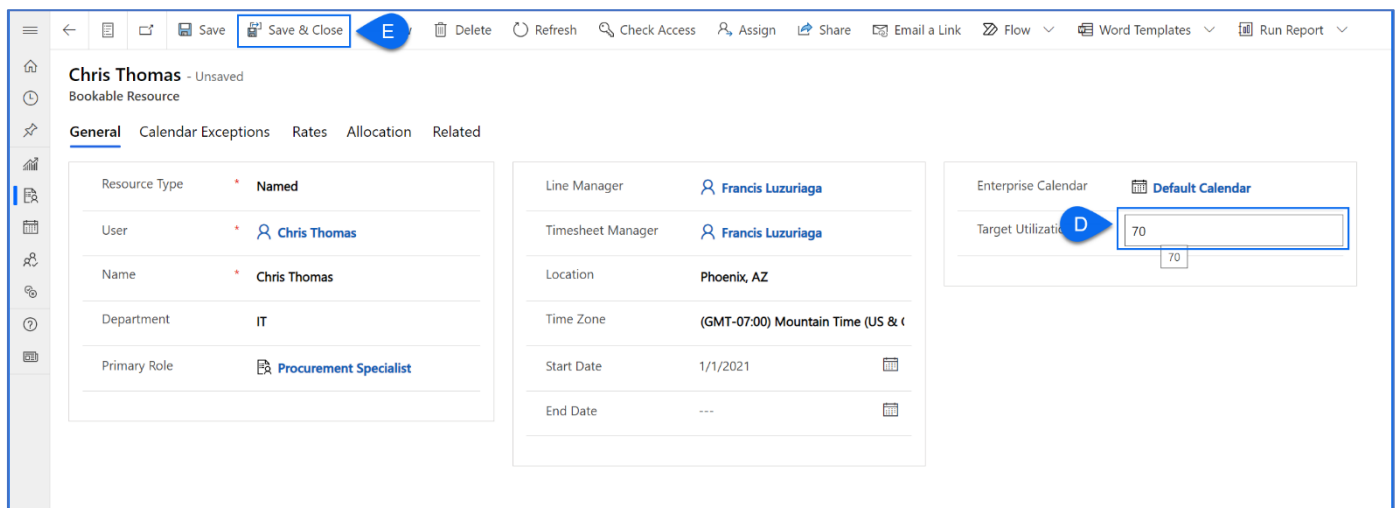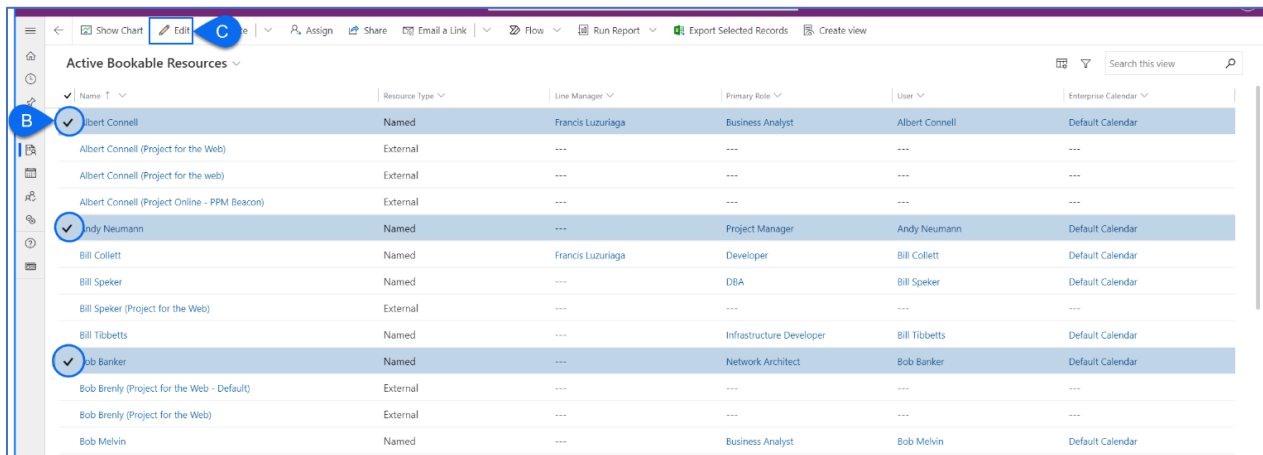

2. UPDATE EXISTING RESOURCES USING THE BULK EDIT

a. Ensure that you are in the **Resources** area and click **Resources** in the **Resources** section.

b. In the default **Active Bookable Resources** view, carefully select all the resources you wish to bulk edit by selecting each resource row in the far-left column.
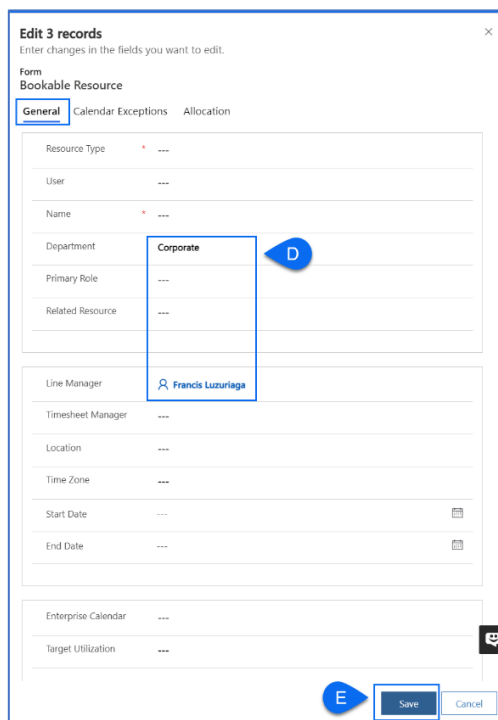
   Important: As any saved bulk changes will be applied to all selected resources, you should carefully review the list displayed on the page to ensure that only the appropriate resources are selected.

c. With the appropriate resources selected and confirmed, click the **Edit** button from the ribbon.

d.   Once the multiple **Bookable Resource** records are open for editing in form on the right-hand side pane, update the relevant information accordingly (e.g., **Department** and **Line Manager** in the **General** section)

e.   Carefully confirming that the changes applied are correct, click the **Save** button to complete the bulk edit process.
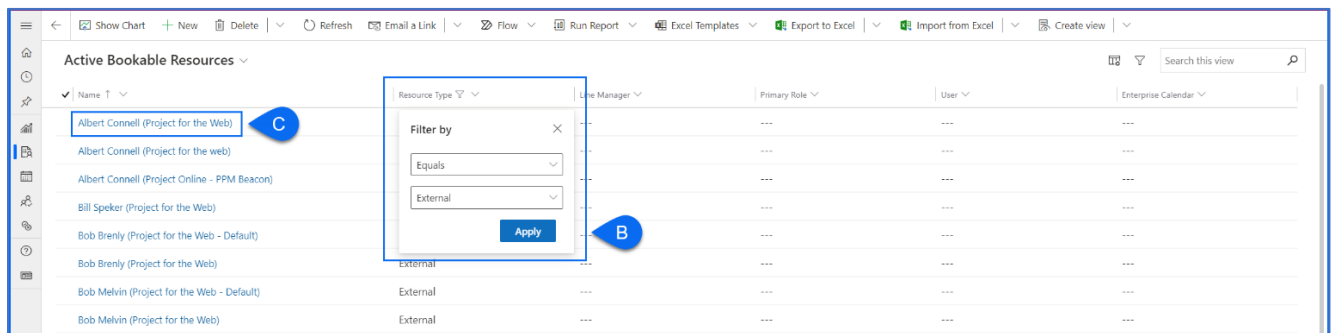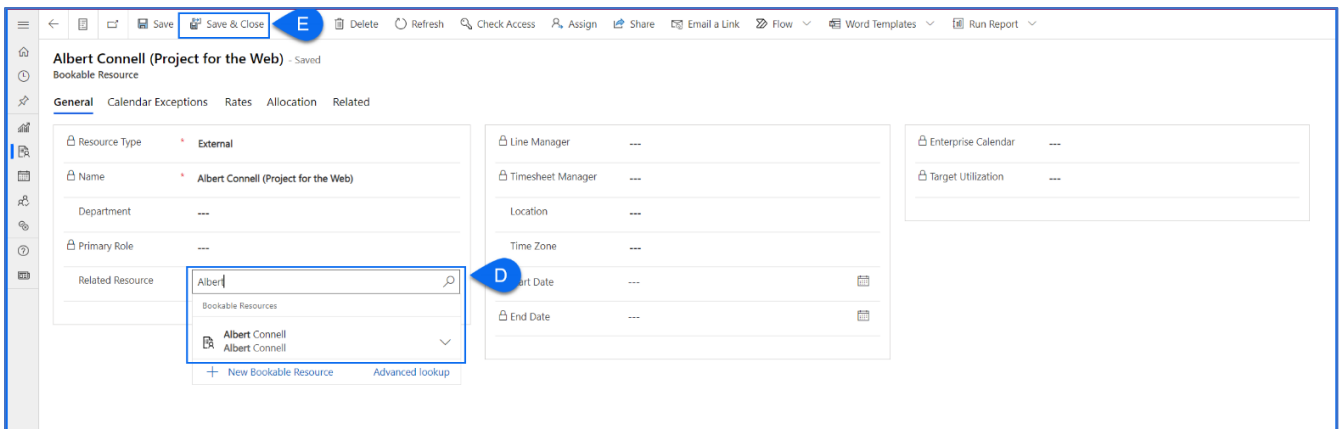
3. ASSOCIATE EXTERNAL RESOURCES TO NAMED RESOURCES

Important: Unless this functionality is disabled in your organisation's solution, the project and task synchronisation process with external execution tools will create **External Resources** for each team member defined in the synchronised external projects. They are created as external resources as there is no automated way to map a resource from an external execution tool to a resource. Therefore, an external resource will be defined for each unique resource used in an external execution tool, meaning that a resource who works across multiple execution tools will have multiple external resources defined the system, each with a suffix on the name in brackets to identify the source tool, for example *Bill Speker (Project Online), Bill Speker (Project for the web), Bill Speker (Jira) or Bill Speker (Azure DevOps)*.

a. Ensure that you are in the **Resources** area and click **Resources** in the **Resources** section.

b. In the default **Active Bookable Resources** view, apply a filter using the **Resource Type** column heading to display **External** resources only.

c. Select the appropriate external resource from the list by clicking on the resource name in the **Name** column.

d. In the **Related Resource** people picker field, search for and select the appropriate named resource.

e. Finally, click the **Save and Close** button from the ribbon to keep the changes applied to the external resource record.

f. Repeat this process until all external resources created by task synchronisation process are associated with the appropriate named resources to ensure effective enterprise resource capacity management.

Important: Multiple external resources can be associated to a single named resource to ensure that all the work is tracked, and that resource capacity and demand is managed across all active projects in the organisation.

4. MANAGE THE LIFECYLE OF BOOKABLE RESOURCES

Bookable Resources that participate in resource planning and project assignments in are managed in these phases:

a. **A resource joins the organisation / needs to be onboarded as a system user.** For resources that need to participate in resource planning, a Bookable Resource (named resource) is created with a **Primary Role** (based on the roles from the generic resources list), a **Line Manager** (if your organisation is using the Resource Request functionality), a **Timesheet Manager** (if your organisation is using the Timesheet functionality), **Target Utilisation** and an **Enterprise Calendar** in the solution for effective resource capacity and demand management in your organisation.

   Tip: Following the steps described in the above section **Create new bookable resources** creates the calculation of the resource capacity across the planning horizon (12 months **past horizon** and 36 months **future horizon** by default).

b. **A resource leaves the organisation / needs to be offboarded as a system user.** For resources that no longer need to participate in resource planning, set the **End Date** of the bookable resource. This process will remove the resource's capacity beyond the end date to the planning horizon and the resource can no longer be used to fulfill requests beyond their end date in the resource plan.

   Important: Unless the default configuration is customised in your organisation's solution, bookable resources <u>cannot</u> be deactivated in the system. Even if the resource's capacity is removed beyond the end date to the planning horizon by setting an **End Date**, the resource can still be searched for in the people picker fields wherever they appear in the forms and assigned to any task in the project plans (schedules) to create task assignments.

c. **The resource passes beyond planning horizon in the past.** Once the **End Date** of a bookable resource passes beyond the planning horizon in the past (12 months by default), they no longer have any capacity that can be reported on. The bookable resource can then be made **Inactive** to remove them from the Insights reports, people picker fields wherever they appear in the forms, etc.