



Best Practices/Resource Definition

Written from the perspective of best practices to build a good project schedule and then maintain a healthy, corruption-free Project Server database.

1. Load Resources

An algorithm can be used to govern the spread of hours on a task assigned to a resource. Spreading hours over each task's duration is also known as contouring.

PROS

- Contouring is an advanced mechanism to adapt resource loading to specific plan requirements and gives schedulers more control in resource planning.

CONS

- Using multiple types of Contouring is extremely tedious to maintain and there are a lot of variables to consider.

Recommendation

It is recommended to flat load the resources (Assignment Information, Work Contour: Flat). Once the team becomes more mature in its practices, using alternative work contours can be considered. If you are just getting started with resource management, focus on evenly-loaded resources (flat contour), and track your results to understand how the work is performed. This is the simplest approach for capacity planning purposes.

2. Level Resources

The project should have resources leveled.

PROS

- Leveling resources ensures resources are not over-allocated and reduces the risk of the planned work items not getting done within the expected time frame and effort.

CONS

- Manually leveling resources can be time consuming.
- Automatically leveling resources can cause impacts to the schedule that are difficult to investigate and resolve.

Recommendation

It is recommended that resources should always be manually leveled prior to publishing the project schedule. To do this, apply the Resource Usage view in Project Professional. Right-click in the time-phased grid (yellow/white timesheet) and select the Remaining Availability details from the shortcut menu. Examine the resource's assigned Work and Remaining Availability across all projects in the portfolio. Scroll to the time period required for the task and determine the resource's availability during that time period. Make adjustments as necessary.

Depending on the resources availability, the task(s) may need to be fast tracked, the duration extended or the scope modified. This is also known as Triple Constraint Theory.

Another potential issue is not being able to accurately determine a resource's availability. This will occur if resources are entering their administrative tasks in advance (e.g. vacation and other planned events in the future). This can be resolved by ensuring each resource enters all time worked and planned to work into normal project plans as well as administrative plans.

3. Use Generic Resources

"TBD" resources should be assigned in the project schedule and templates using generic resources defined in the resource pool. When the actual resource is identified, the generic resource is replaced with that actual resource.

PROS

- Using generic resources allows the project tasks to be fully planned even when resources are unknown.
- Using generic resources easily allows you to substitute in an actual resource when they become available to be assigned to work.
- It is possible to automatically optimize the substitution of resources with similar skills. Identifying generic resources is key to this process.
- Generic resources can be stored in the ERP. Storing generic resources in the ERP ensures the generics always have the same attributes and skills when assigned across multiple projects.

CONS

- If generic resources are not replaced with actual resources and actual resources begin to report time to that task, then the project hours (and % Complete) will not be accurately reflected.
- Generic resource calendars are usually not defined; therefore, capacity planning becomes an issue.
- Generic resources need to be assigned custom outline codes for skills-based resource replacement by the Resource Substitution Wizard.

Recommendation

It is recommended that generic resources be used to plan the schedule if the actual resource is not known. When identified, the generic resource needs to be replaced with the actual resource. Local generic resources, or resources available only to a specific project plan, should never be published to the server. These resources can be identified with a "head" icon in the Resource Sheet view.

Any comments or requests?
Please don't hesitate to let us know!

