Project Management – Set Up

Quick Reference Guide

Navigating the Quick Reference Guide

There are **several ways** to navigate this Quick Reference Guide (QRG):

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Project Resource Setup

Create Work Calendars

NetSuite Work Calendars define the working hours for project resources for each day and workdays for each week. It also tracks non-working days, such as weekends and holidays.

When you assign a resource to a task, you specify both the percent of time and the number of hours the resource is expected to use to complete the task. NetSuite uses the assigned work calendar to calculate the total number of days expected to complete the task.

Knowing the available workdays helps you easily track the work capacity of resources so that you can effectively assign resources and schedule project tasks.

Note: A default Work Calendar is automatically assigned to all new project resources.

Steps to Create a Default Work Calendar

1) Perform a global **Search** to locate the **Work Calendars** page.
2) Click **[New]**.
3) Enter a **Name** for this work calendar.
4) Select **Default Calendar** to assign this calendar as the default on Employee records.
5) Navigate to the **Working Days** subtab.
6) Select the working days of the week and enter the number of **Hours per Day**.

Note: Each work calendar must have at least one working day and one or more hours of work time per day.

7) In the **Start At** field, enter the workday start time.
8) Navigate to the **Non Working Days** subtab.
9) Select a **Date**.
10) Enter a **Description** for the non-working day.
11) Click **[Add Row]**.
12) Repeat steps 8-11 to enter additional non-working days.
13) Click **[Save]**.

14) Repeat the steps to create additional work calendars as needed, such as Part-Time and custom work calendar for employees working in multiple countries or who have different work schedules.

Note: For additional work calendars, the only difference in the setup is that they are not marked as the default work calendar.

Define Project Resource Roles

Define Project Resource Roles to help identify different roles on a project. For certain roles, such as the Project Manager, you can also enable permissions to approve project time and reassign tasks.

Steps

1) Perform a global **Search** to locate the **Project Resource Roles** page.
2) Click **[New]**.
3) Enter a **Name** for this role.
4) Select **Project Time Approver** to enable this role to approve time entered against an assigned project.
5) (Optional) Select **Own Time Approval** to enable this role to approve their own time.
6) Select the **Allow Replacing Task Assignments in Bulk** to enable employees with this role to reassign project tasks in bulk.
7) Enter a **Description** for this role.
8) Click **[Save]**.

Identify Project Resource

Before you can assign employees and vendors to a project, you must set up their employee or vendor record in NetSuite. Information like work calendar and utilization time, labor costs, hourly rate, and billing classes helps calculate project estimates and profits.

Setting default values for project resources saves you time and ensures a standardized process for project setup and task assignments.

Steps to add an Employee as a Project Resource

1) Perform a global **Search** to locate the Employee record.
2) Click **[Edit]**.

3) Navigate to the **Human Resource** subtab.
4) Select **Project Resource**.
5) Confirm or select the **Default Job Resource Role** for this employee.
6) Select a **Billing Class** to associate with this employee.
7) Enter a **Target Utilization** percent for this project resource.
8) Select a **Work Calendar**.
9) Enter the employee's hourly overhead labor rate in the **Labor Cost** field.
10) Select the **Expense Approver** for this employee's expense reports.
11) Navigate to the **Time Tracking** subtab.
12) Select the **Time Approver** for this employee's time transaction.
13) Click **[Save]**.

Steps to Add a Third-Party Project Resource

1) Perform a global **Search** to locate the Vendor page.
2) Click **Edit** next to the vendor's name.
3) Select **Project Resource**.
4) Navigate to the **Financial** subtab.
5) Select a **Billing Class** and **Work Calendar** for this vendor.
6) Enter the **Labor Cost** for this vendor.
7) On the **Rates** sublist, enter the **Hourly Rate** to be paid.
8) Select the **Expense Approver** for this employee's expense reports.
9) Select the **Time Approver** for this employee's time transaction.
10) Click **[Save]**.

Steps to Give Access to the Vendor Center

1) On the vendor record, navigate to **System Information** subtab > **Access** sublist.
2) Click the **Role** column.
3) Select the **Vendor Center**.
4) Click **[Add]** to assign the vendor to this role.
5) Click **[Save]**.

Create Generic Resources

When specific resources are not yet identified during project planning, you create generic resources for different members of a project team, such as Project Managers, Business Analysts, Consultants, Trainers, and so on.

You can then assign generic resources to resource allocation records to reserve project resources, and to project tasks to estimate project costs.

You can also include generic resources on a project template to streamline the project creation and setup process for project managers and resource managers.

Steps

1) Perform a global **Search** to locate the **Generic Resources** page.
2) Click **[New Generic Resource]**.
3) Enter a **Name** for this generic resource.
4) Select a **Billing Class**.
5) Enter **Labor Cost** and a **Price** for this resource.
6) Select a **Work Calendar**.
7) Click **[Save]**.