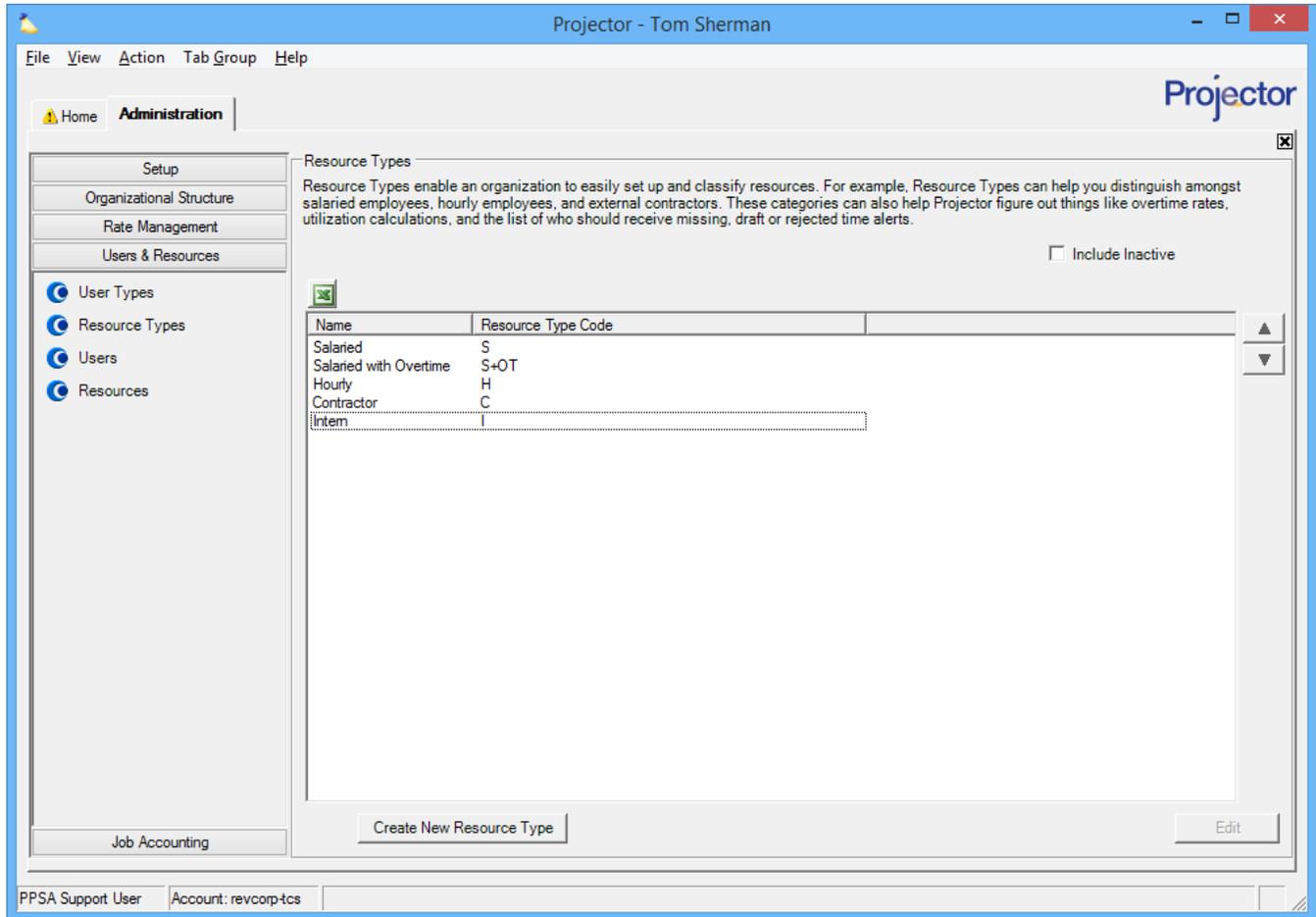# Resource Types Editor

> Resource Types enable an organization to classify resources. For example, to distinguish amongst salaried employees, hourly employees, and external contractors. The type determines default settings for a new resource of that type, resource direct cost rates, and available time-off reasons. You apply a type through the Resource Editor.

The resource type editor is reached by choosing **Administration | Users & Resources | Resource Types**.

Permissions and Settings

Updating Resource Types requires the global permission **System Settings** set to **Update**.

If you are using our **Enterprise Configuration** module, you may limit which resource types are available to each cost center.

Resource Type Browser

The main screen shows all the active resource types in your installation. Here you can create, edit, delete, or inactivate resource types.

Show Inactive

Tick the **Include Inactive** checkbox to see these. They will appear as partially grayed out.

Make Active/Inactive

Double click on a resource type to open the editor. Here there will be a checkbox to toggle the activity state.

Add New

Click the **Create New Resource Type** button.

Delete

Right click on any resource type choose **Delete**. If any resources are currently assigned to the type, or have been assigned to the type in their history, then you will not be able to delete it. You can either clear the history on all applicable resources and delete, or make it inactive instead.

Resource Type Editor

When you edit an existing resource type or add a new one, you presented with the following form. It is comprised of four sections. A general area at the top and three subtabs. Each section is described below.

General Settings

The upper section contains some general settings that describe the resource type.

Control	Description
Resource Type Name	This is the 'nice name' that you will see when running reports and choosing from dropdown lists within Projector.
Resource Type Code	Short codes are useful for organizations that create customized interfaces for Projector. Generally, you will try to always keep the short code the same so that web services and customized reports don't break even if someone changes the 'nice name'
Description	Enter a useful description to help people decide where to categorize resources
Inactive	Inactivate a resource type when you no longer need to use it. Any resource that currently has this resource type, or has had it in the past, will be unaffected by the change. But you will be unable to assign the inactive resource type to all new resources or when editing an existing resource.

Resource Defaults Tab

The Resource Defaults tab deals with applying common settings to anyone who becomes part of the group. For example, all your hourly contractors need the Billable flag set. These settings are a recommendation, not a requirement, and can be ignored or overridden as needed. In general, you should be trying to accurately model your organization so that most of the default settings make sense for the group. Changes made on this tab do not have any affect to existing resources, only for new resources or resources that are switched to be this type.

Setting	Description
Billable resource	Check this box if the resource normally performs billable project work, as opposed to a resource whose work hours are not directly billed to a client. This is used for reporting purposes only. It doesn't affect whether or not a resource can report billable time.
Temporary resource	This is a legacy field from before Resource Types existed. It was previously used to categorize a resource as non-permanent - such as a freelancer, temp, or contractor. Now we recommend using this very dialog, resource types, to categorize. The temporary flag is used for reporting purposes only.
Track missing time for this resource	Tick this box if you wish Projector to track missing time for this particular resource. When missing time is tracked we look at the resource's work schedule to see how many hours they are supposed to submit either per-day or per-week. Reminder emails can then be optionally sent. This checkbox does not apply to resources that are categorized as Hourly, as by definition, an hourly resource only works as many hours as they need to.
Send this resource e-mails for missing, draft, or rejected time	Tick this box if you wish Projector to send missing time e-mail reminders. E-mails are sent for the previous eight weeks. After eight weeks we assume time will never be entered and the emails stop. To configure when emails are sent, please see the system settings for time.
Resource may approve their own time	This resource will be able to approve their own time. See the Configure Time Approval how-to for more information on when this setting is necessary.
Override standard RDC rate	By default, a resource's RDC is determined by their department and title. Some resource types may always have a specific hourly rate though. For example, contractors. When this checkbox is ticked, whoever creates or edits the resource is expected to enter an hourly rate at that time.
Pay Category	Select how this resource type is paid – **Salaried**, **Salaried with Overtime**, or **Hourly**. This field is for reporting purposes only. Choosing "salaried with overtime" does not automatically cause the resource to bill overtime OR for the calculations about their RDC to change.
Pay via subcontractor invoice	Tick if this resource is a subcontractor who enters their time in Projector. You then reimburse the subcontactor or the subcontractor's company via subcontractor invoices.

Pay expense reports directly to vendor	When ticked, a resource can only enter expenses that were paid by a vendor. Typically a company issued credit card. When enabled, a resource cannot enter expenses that they have paid out of their own pocket, but must ask an expenses manager to do it for them.

RDC by Rate Type Tab

This tab shows a grid with one row for each Standard Rate Type in your installation. You can vary a resource type's RDC (resource direct cost) calculation based on the type of work they are doing. The most common example is overtime. When a resource works overtime, are they reimbursed at their normal rate, their overtime rate, or not at all? The following is an example for a fictitious hourly employee. Your business needs and settings may vary from these choices.

Resource Defaults	RDC by Rate Type	Time-off Reasons	Utilization Targets

Standard Rate Type	% of RDC Rate
Regular	100.00%
Zero Rate	100.00%
Not Chargeable	100.00%
Overtime (1.5x)	100.00%
Overtime (2x)	100.00%
Overridden	100.00%
Travel	100.00%

Time-off Reasons Tab

Determine which time-off reasons resources can choose from. Tick the checkbox for each relevant reason.

Resource Defaults	RDC by Rate Type	Time-off Reasons	Utilization Targets

Allowed time-off reasons

- ☐ (All time-off reasons)
- ☐ Vacation
- ☐ Personal Day
- ☐ Flex Time
- ☐ Sick Day
- ☐ Maternity Leave
- ☐ Paternity Leave
- ☐ Family Medical Leave Act
- ☐ Short Term Disability
- ☐ Jury Duty
- ☐ Military Service
- ☐ Religious Holiday
- ☐ Bereavement
- ☐ Comp Time
- ☐ Other

When your resource are in their time entry screens, they are only presented with the ticked options.

FMLA

Illness

Jury Duty

Personal Day

Vacation

Utilization Targets

Utilization targets are an extremely powerful feature in Projector. They allow you to track the billable, chargeable, productive, and total hours a resource enters. You can then make sure that they are entering an appropriate amount in each category. This targeting isn't just a single number though. You can set a minimum and maximum target to encourage your resources to stay within a certain range. Once you've defined your targets and ranges, you can pull this information into Projector reports, view it on scheduling screens, and even display it on each resource's dashboard. Now they will have real time feedback throughout the year on their performance.

Utilization in these calculations is based on the **Capacity** method. The capacity method compares a group of hours against your Utilization Basis Hours. For example, in a given week you are expected to log 40 hours. Your UBH is 40. During that week you work 30 hours on billable projects. Your Billable Utilization is 30/40 or 75%.

But what exactly is UBH? Where does it come from? UBH is your normal working hours. By default, your normal working hours are determined by your location. However, they can be overridden on a per resource basis (useful if someone works half-time). The final bit to this puzzle is your UBH calculation method. This is determined by a system setting that allows you to take holiday and timeoff into account. The method you choose depends on how you track your resources. Rather than try to type out an explanation, the table below provides a visual example of the different methods.

This table is for a 40 hour work week. You have one holiday and take one vacation day. The rest of your time is normal project work.

Method	UBH	Hours Worked	Total Utilization
Normal Working Hours	40	24	60%
Normal Working Hours - Holidays	32	24	75%
Normal Working Hours - Holidays - Timeoff	24	24	100%

For a detailed explanation of Capacity utilization and UBH calculations, please see our Utilization Report documentation.

Resource Defaults | RDC by Rate Type | Time-off Reasons | Utilization Targets

Utilization Type:	Billable	Chargeable	Productive	Total

SET TARGETS

	Billable	Chargeable	Productive	Total
Minimum target	60%	55%	90%	100%
Maximum target	80%	75%	100%	100%

CHOOSE DISPLAY OPTIONS

On My Dashboard page:

	Billable	Chargeable	Productive	Total
Show utilization	☑	☑	☑	☑
Show minimum target	☑	☑	☑	☑
Show maximum target	☑	☑	☑	☑

On Resource Scheduling screens:

	Billable		Productive	Total
Show utilization	☐		☐	☐
Show minimum target	☐		☐	☐
Show maximum target	☐		☐	☐

DEFINE FLAGS

If over maximum target, show:	▲ 110%	in the following color: (orange)
If under minimum target, show:	▼ 25%	in the following color: (red)
If within range, show:	■ 70%	in the following color: (green)

| Setting	Description
Target	Set your minimum and maximum targets for each column. By setting a range you let your resources know their goal. Billable consultants may always have a goal of 100% billable time, but project managers may have a cap of 50% billable time, with their remaining hours targeted towards administrative tasks. How you map these fields is highly dependent on your organizational structure. The bullet list below explains each category of utilization. • **Billable** - Hours on billable engagement types. Whether the hours are actually charged to a client is irrelevant • **Chargeable** - Hours that were charged to a client. They have positive Billing Adjusted Revenue. For Fixed Price engagement types, chargeable is a bit of a non-sequitur because you aren't charging for individual time cards. However, Projector still tracks the BAR on FP time cards so that you can see how profitable it would have been if you had gone for a T&M vs. FP contract. So that often unused BAR value still counts towards chargeable hours. If you primarily run FP projects you might want to dispense with tracking Chargeable. If you run a mixture of T&M and FP, then you may want to make sure that your default BAR rates are positive so that your chargeable targets calculate correctly. • **Productive** - Hours on productive engagement types. Projector automatically sets all billable engagements as productive. Non-billable engagements can optionally be made productive. You may choose to do this for something like Sales work, which does not generate billable revenue, but is a productive use of resource time. You can check whether an engagement type is productive by editing it and looking at the general tab. • **Total** - The total hours a resource enters against all projects.
Show On Dashboard	Tick the checkbox for each type of utilization you want displayed on your resource's dashboard.
Show on Resource Scheduling Screens	When ticked, you can optionally show resource scheduling data on the Resource Browser and Resourcing Dashboard.
Flags	You can optionally present colored dots that represent current performance. If you don't want to display a colored dot, then choose **Clear** from the color dropdown list.

Reports

Utilization target data is available in the Ginsu, Utilization, and Variance reports. You can bring in their min/max targets, min/max hours, and an indicator symbol of whether they fell above, below, or within their target range.

|		Week				
Resource Display Name	**Data**	12-Jan-2014	19-Jan-2014	26-Jan-2014	02-Feb-2014	**Grand Total**
Tom Sherman	Billable Utilization to Target Indicator	▲	▼	▲	▲	▲
	Billable Type Percent	120.00%	40.00%	87.50%	112.50%	**90.00%**
	Billable Utilization Min Target %	60%	60%	60%	60%	**60%**
	Billable Utilization Max Target %	80%	80%	80%	80%	**80%**

Resource Browser

The resource browser shows you your **supply** of labor. You can optionally show utilization targets on this screen. This is useful for matching your supply of labor with your demand for labor. If I see someone is short on billable work, and there are requests for billable work out there, I can match my worker's needs with my scheduling needs.
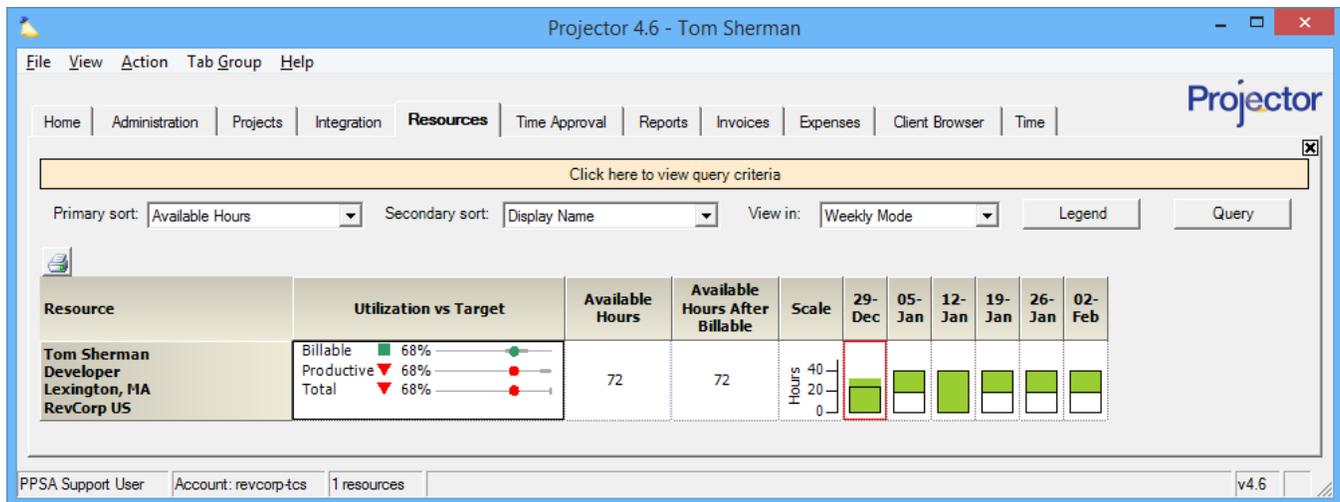
Resourcing Dashboard

The resourcing dashboard can also display utilization targets when viewed by resource. To add it, click the **Customize Dashboard** button. Then under the Column Fields section tick **Utilization vs. Targets**.
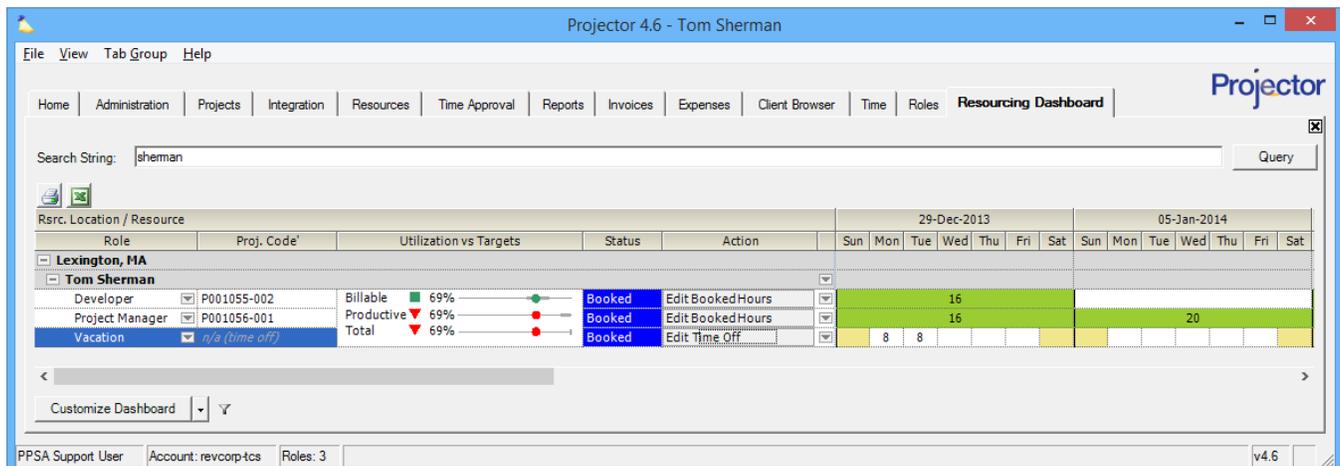
Projector Web Dashboard

This is perhaps one of the most useful areas for resource targets. Your individual resources can review their personal performance and work to keep themselves reporting the appropriate amount of billable, productive, and chargeable work. Values are shown on their dashboards.

Dashboard for Tom Sherman

ANNOUNCEMENTS | If you don't have time to do it right, when will you have time to do it over? | Take care of the minutes and the hours will take care of th

TIME & EXPENSES

🕐 TIMESHEETS

Current timesheet

MISSING, DRAFT, AND REJECTED

Week of 17 Jul 2011
Week of 31 Jul 2011
Week of 29 Jan 2012
Week of 09 Sep 2012
Week of 16 Dec 2012
Week of 07 Apr 2013
Week of 02 Jun 2013

📎 EXPENSE REPORTS

View expense reports | Create expense report

STATS (Based on approved time)

	2013	2014
UTILIZATION		
Billable	70%	78%
Chargeable	70%	70%
Productive	90%	78%
Total	98%	91%
TIME OFF		
Vacation	124.0	40.0