

## 0 Overview

This 'How To' Guide demonstrates an approach to assigning resources for organisations that are not mature enough or do not wish to assign resources at task detail level.

In this guide we will be demonstrating how to...

- I. Assign Generic resources to a Summary "bucket" Task
- II. Amend the amount of effort / time spent on a Summary "bucket" Task
- III. Convert Generic resources to Named resources
- IV. Assign a Task Owner

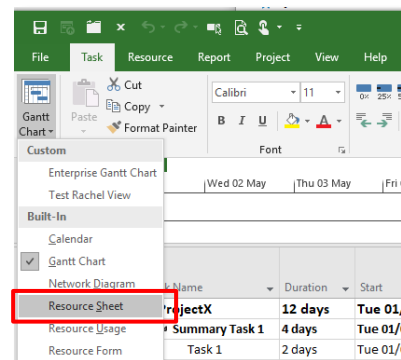
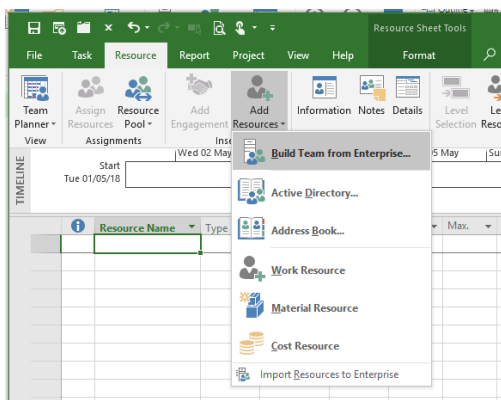
## 1 Assigning Generic Resource to a Summary "bucket" Task

Before we can assign resources to project tasks, we must first build the team for that project. Once you have completed this initial action you can then assign any resource from the identified team whenever you wish. This guide therefore starts with explaining how to build your initial team.

Open the project for editing in Microsoft Project

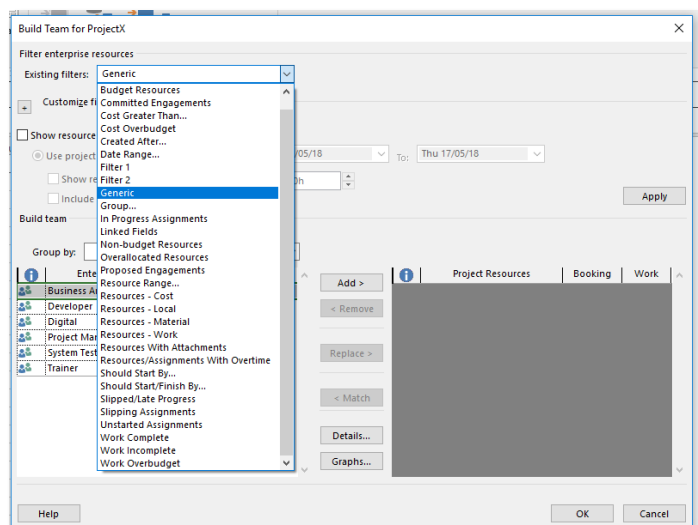
In the **Task** ribbon...

- Go to **Gantt Chart**
- Select **Resource Sheet**



Under the **Resource** ribbon...

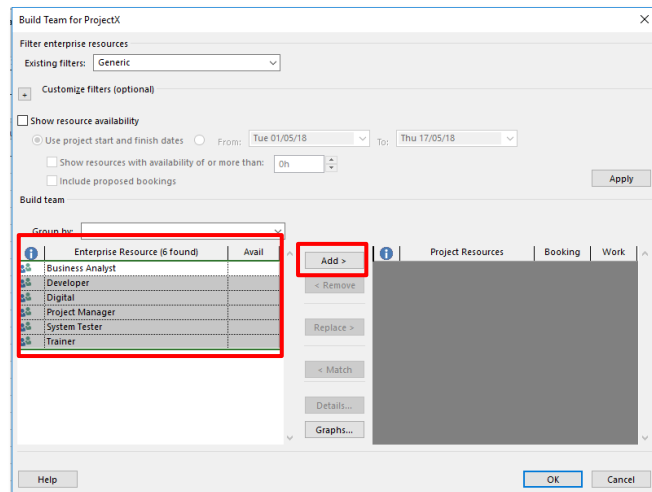
- Go to **Add Resources**
- Select **Build Team from Enterprise**



In the **Build Team for Project** window....

- Go to **Existing Filters**
- Select **Generic**

- Select all the generic resources from the Enterprise Resource side
- Select **Add**
- Click **OK**



Generic resources are now added to the Project....

	Resource Name	Type	Initials	Role	Max.	Base
1	Business Analyst	Work	B	Business Analyst	0%	Standard
2	Developer	Work	D	Developer	0%	Standard
3	Digital	Work	T	Digital	0%	Standard
4	Project Manager	Work	P	Project Manager	0%	Standard
5	System Tester	Work	G	System Test	0%	Standard
6	Trainer	Work	T	Trainer	0%	Standard



Maximum capacity for generic resource is set to 0%

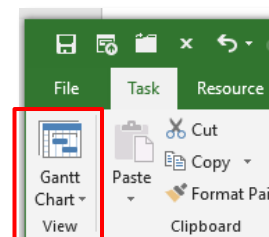


It is recommended to set the "Maximum Units" for a Generic Resource to be 0% as whilst they represent demand, they cannot satisfy that demand. This will therefore avoid a misrepresentation of capacity being encountered.

Now we have built our team we can start assigning resources to tasks. The agreed approach is that resources will be assigned to a summary 'bucket' task. This simplifies the assignments process and the amount of time it takes to reflect resource utilisation for a project. You can assign resources at a more detailed level, but this takes more time to undertake.

Return to the project schedule...

- Under the **Task** ribbon
- Select **Gantt Chart View**
- Insert a new task between the **Summary Task** and **Task 1**  
*This will be your bucket task to assign resources*
- Ensure to give the bucket task a **meaningful name**



	Task Mode	Task Name	Duration	Start	Finish	Predecessors	Wor	% Complet	Resource Names
0		Project1	6 days?	25/05/2018	04/06/2018		0 hrs	0%	
1		Summary Task 1	6 days?	25/05/2018	04/06/2018		0 hrs	0%	
2		"Resource Bucket"	1 day?	25/05/2018	25/05/2018		0 hrs	0%	
3		Task 1	2 days	25/05/2018	29/05/2018		0 hrs	0%	
4		Task 2	2 days	30/05/2018	31/05/2018	3	0 hrs	0%	
5		Task 3	2 days	01/06/2018	04/06/2018	4	0 hrs	0%	



Once a team member is assigned to a task, that task will appear in their assigned tasks and, if applicable, their timesheet.  
We have used the naming convention "Resource Bucket" for this demonstration only. You will need to ensure you give the bucket task a meaningful name.

Next, change the Task Type to Fixed Duration....

- Double click on the task name to open the **Task Information** window
- Go to the **Advanced** tab
- Select **Fixed Duration** from the **Task Type** drop down
- Click OK

Task Information

General | Predecessors | Resources | Advanced | Notes | Custom Fields

Name: "Resource Bucket" Duration: 6 days ☐ Estimated

Constrain task

Deadline: NA

Constraint type: As Soon As Possible Constraint date: NA

Task type: Fixed Duration ☐ Effort driven

Calendar: Fixed Duration ☐ Scheduling ignores resource calendars

WBS code: Fixed Units

Earned value method: % Complete

☐ Mark task as milestone

Help OK Cancel

- Manually update the task duration of the "bucket" task to match the Summary Task duration  
(In this example, 6 days)

	i	Task Mode	Task Name	Duration	Start	Finish	Predecessors	Wor	% Complet	Resource Names
0			Project1	6 days	14/05/2018	21/05/2018		0 hrs	0%	
1			Summary Task 1	6 days	14/05/2018	21/05/2018		0 hrs	0%	
2			"Resource Bucke"	6 days	14/05/2018	21/05/2018		0 hrs	0%	
3			Task 1	2 days	14/05/2018	15/05/2018		0 hrs	0%	

Next, add a predecessor to the "bucket" task so that the start date always matches the start date of "Task 1"... (or the first task in this section of the work breakdown structure)

- Open the **Task Information** window
- Go to the **Predecessor** tab
- Go to **Task Name** > From the drop down, select the first task that sits beneath the bucket task in your schedule
- Select **Start to Start (SS)** from the **Type** drop down > Click **OK**

Task Information

General | Predecessors | Resources | Advanced | Notes | Custom Fields

Name: "Resource Bucket" Duration: 1 day? ☒ Estimated

Predecessors:

ID	Task Name	Type	Lag
3	Task 1	Start-to-Start (SS)	0d

Help OK Cancel

To assign a generic resource...

- Go to the Task ribbon and select **Details**
- In the **Resource Names** field, select a generic resource from the drop down (*Business Analyst in this example*)
- Click OK

The screenshot shows the Microsoft Project Professional interface. The 'Task' ribbon is active, and the 'Details' button is highlighted. The 'Task Details' form is open for the 'Resource Bucket' task. The 'Resource Names' field is expanded, showing a list of resources: Business Analyst, Developer, Digital, Project Manager, System Tester, and Trainer. The 'Business Analyst' resource is selected.

ID	Resource Name	Units	Work
1	Business Analyst		
2	Developer		
3	Digital		
4	Project Manager		
5	System Tester		
6	Trainer		

Business Analyst is now assigned at the summary **Resource Bucket** Task level

- Amend the units accordingly from the default 0% for Generic Resources to reflect demand
- Click OK and the Work effort will be calculated
- Click on the Details icon from the Task ribbon to close the Task Details form

The screenshot shows the Microsoft Project Professional interface with the 'Task Details' form open for the 'Resource Bucket' task. The 'Resource Names' field now shows 'Business Analyst' assigned. The 'Units' field is set to 100%, and the 'Work' field is calculated as 42h.

ID	Resource Name	Units	Work
1	Business Analyst	100%	42h

In the Gantt Chart view, notice the red man that has now appeared in the indicator column....

	i	Task Mode	Task Name	Duration	Start	Finish	Predecessors	Work	% Complete	Resource Names
0			Project 1	6 days	14/05/2018	21/05/2018		42 hrs	0%	
1			Summary Task 1	6 days	14/05/2018	21/05/2018		42 hrs	0%	
2			"Resource Bucket"	6 days	14/05/2018	21/05/2018	3SS	42 hrs	0%	Business Analyst
3			Task 1	2 days	14/05/2018	15/05/2018		0 hrs	0%	
4			Task 2	2 days	16/05/2018	17/05/2018	3	0 hrs	0%	
5			Task 3	2 days	18/05/2018	21/05/2018	4	0 hrs	0%	

- The "ROG" (Red Over-allocation Guy) indicates that the resource is **overallocated**
- It is OK to ignore this when assigning generic resources but not for Named Individuals



Remember, Generic Resources are set to 0% in the Enterprise Resource Pool. Therefore, any allocation above 0% will show the "ROG" indicator (Red Over-allocation Guy)



If the "ROG" indicator appears when you have assigned a Named Individual, then you **will** need to manage resource over-allocation. You should **not** ignore "ROG" indicators at this stage of planning

## 2 Amend the amount of effort spent on a "Resource Bucket" Task

Time / effort can be amended in three ways. These are explained in order of simplicity. Method 1 is based on percentage utilisation. For a more precise assignment you could use method 2 which enables you to edit the total assigned hours. Method 3 is for those looking to make very precise assignments where they wish to edit the hours assigned by time period (e.g. day).

### 2.1 Method 1 – Edit Percent Assignment

- Click on the Details icon on the Task ribbon to open the Task Details form
- Locate the resource to be updated (Business Analyst in this example)
- Amend **Units %** accordingly
- Click OK

Name: "Resource Bucket"    Duration: 6 days    ☐ Effort driven    ☐ Manually Scheduled    Previous    Next

Dates: Start: 14/05/2018    Finish: 21/05/2018    Constraint: As Soon As Possible    Task type: Fixed Duration    WBS code: 1.1

☒ Current    ☐ Baseline    ☐ Actual    Priority: 500    % Complete: 0%

ID	Resource Name	Units	Work	ID	Predecessor Name	Type	Lag
1	Business Analyst	50%	21h	3	Task 1	SS	0d



When the task is set to **Fixed Duration**, editing the **Units %** will update the **Work (hours)** accordingly. Duration will always remain fixed

## 2.2 Method 2 – Edit the total work hours

- Click on the **Details** icon on the Task ribbon to open the Task Details form
- Locate the resource to be updated (Business Analyst in this example)
- Amend **Work** accordingly
- Click OK

**TASK DETAILS FORM**

Name: "Resource Bucket" Duration: 6 days ☐ Effort driven ☐ Manually Scheduled

**Dates**

Start: 14/05/2018 Finish: 21/05/2018

☒ Current ☐ Baseline ☐ Actual

**Constraint**

As Soon As Possible Task type: Fixed Duration

Date: NA WBS code: 1.1

Priority: 500 % Complete: 0%

ID	Resource Name	Units	Work
1	Business Analyst	50%	21h

ID	Predecessor Name	Type	Lag
3	Task 1	SS	0d

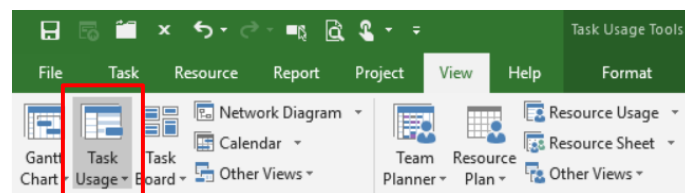
When the task is set to **Fixed Duration**, editing the **Work (hours)** will update the **Peak Units %** accordingly. Duration will always remain fixed.

Peak Units represent the maximum effort a resource is working on a given assignment in the current time period. When peak units are recalculated you will not see a change to the schedule, you will only be able to view Peak Units in a timephased view such as Resource Usage.



### 2.3 Method 3 – Edit work hours by day

- Go to the **View** ribbon and click **Task Usage**



In **Task Usage** view...

- Business Analyst has been assigned to **Resource Bucket** for 3.5 hours a day over 6 days (at 50%)

[illegible]

*Note: MS Project assumes a flat work profile*

Type in the **Work (hours)** per day...

[illegible]

This icon indicates that the assignment work has been edited

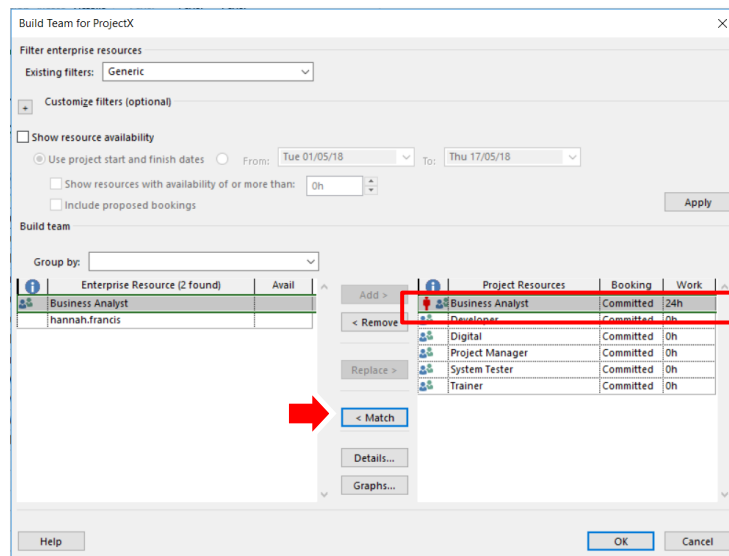
## 2.4 Convert Generic resources to Named resources

In the Gantt Chart view....

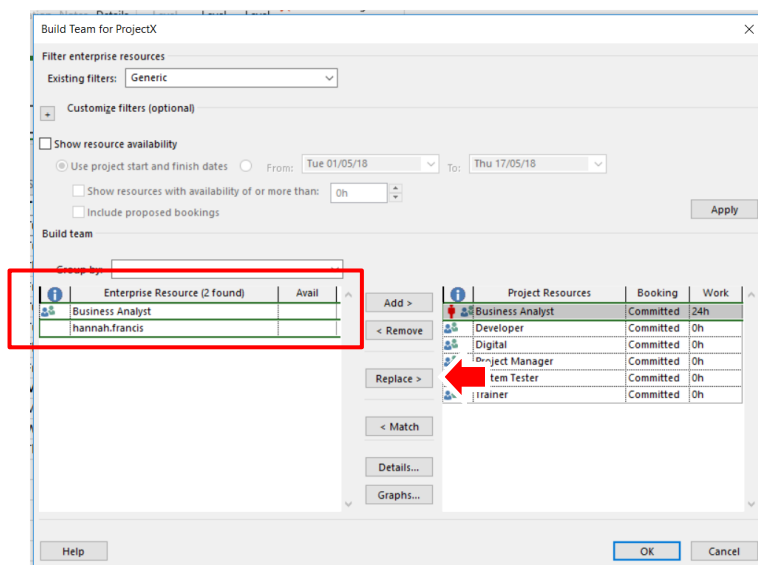
- Select the Task row
- Go to **Resource** on the task ribbon
- Click **Add Resources** and select **Build Team from Enterprise**

In the **Build Team for Project** window...

- Select the Business Analyst resource from **Project Resources** (right hand column)
- Click **Match**



- Select the Named Resource you want to use from **Enterprise Resources** (left hand column)
- Select **Replace**
- Click **OK**



All tasks with the generic resource 'Business Analyst' will now be replaced with the selected named resource.

	Task Mode	Task Name	Duration	Start	Finish	Predecessors	Work	% Complete	Resource Names	Add
0		Project 1	12 days	14/05/2018	30/05/2018		42 hrs	0%		
1		Summary Task 1	6 days	14/05/2018	21/05/2018		21 hrs	0%		
2		"Resource Bucket"	6 days	14/05/2018	21/05/2018	3SS	21 hrs	0%	Hannah.Francis[50%]	
3		Task 1	2 days	14/05/2018	15/05/2018		0 hrs	0%		
4		Task 2	2 days	16/05/2018	17/05/2018	3	0 hrs	0%		



The 'Match and Replace' method assumes that the Named Individual has not already been added to the Project Resource pool

## 2.5 Assign a Task Owner

Where there are a number of resources assigned to a bucket Task and you would like to identify who is the task owner, without actually assigning a resource at task detail level, then a new custom field can be added to the schedule.

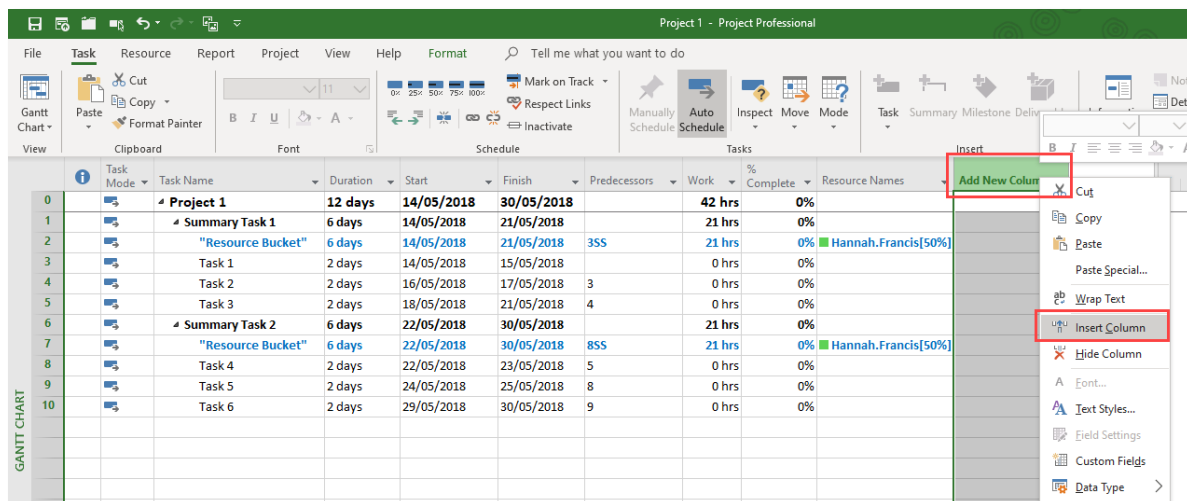
A custom Task Owner field can be added to enable Project Managers to assign ownership to detail tasks without affecting the resource assignments.

The 'Assign a Task Owner' screen shots below explain this approach.



Project Online Administrators will first need to add the task custom field to the list of Enterprise Custom Fields in Project Online.

- Right click at the top the Gantt chart to insert new column
- Click **Insert Column**



- Select "Task Owner"
- Use this free text field to type in Task Owners against different tasks