#### **Overview** 0

1

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...

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

### 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...

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TIMELINE

Task Resource

Go to Gantt Chart •

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**t**@

Project

Add

Select Resource Sheet .

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Res		rojectX		12 days	•	Tue 01
Res		Summary	Task 1	4 days		Tue 01/
	ource Form	Task 1		2 days		Tue 01/



Import Resources to Enterprise

For

Information Notes Details

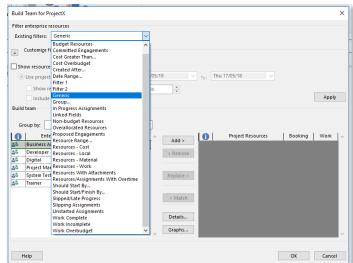
å

In the Build Team for Project window ....

- Go to Existing Filters •
- Select Generic •

Under the **Resource** ribbon...

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





Simplifying the journey

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

	resources					
Existing filters:	Generic	~				
+ Customi <u>z</u> e	filters (optional)					
Show resource	e availability					
Use project	t start and finish dates 📀	From: Tue 01/0	05/18	✓ To: Thu	17/05/18 🗸	
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			Details			

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

	0	Resource Name 🔻	Туре 🔻	Initials 💌	Role	Max. 👻	Base 👻
1	22	Business Analyst	Work	В	Business Analyst	0%	Standard
2	<u>2</u> 2	Developer	Work	D	Developer	0%	Standard
3	22	Digital	Work	т	Digital	0%	Standard
4	22	Project Manager	Work	Р	Project Manager	0%	Standard
5	<u>2</u> 2	System Tester	Work	G	System Test	0%	Standard
6	22	Trainer	Work	т	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



	0	Task Mode 🔻	Task Name 👻	Duration 👻	Start 👻	Finish 👻	Predecessors 👻	Wor 🗸	% Complet <del>•</del>	Resource Names
0			Project1	6 days?	25/05/2018	04/06/2018		0 hrs	0%	
1		-5	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								
<u>N</u> ame: Resource Bu Constrain task Dead <u>l</u> ine:	cket" Duration: 6 days 🔭 Estimated								
Constraint type: As Soon As Possible   Constraint date: NA   Iask type: Fixed Duration   Effort driven									
C <u>a</u> lendar: <u>W</u> BS code:	Fixed Duration Fixed Duration Fixed Units Fixed Work								
Earned value method	t: % Complete V								
∏ <u>M</u> ark task as milestone									
<u>H</u> elp	OK Cancel								

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

0	Mode 🔻	Task Name	<ul> <li>Duration</li> </ul>	Ŧ	Start 👻	Finish 🚽	Predecessors 👻	Wor 🗸	% Complet <del>v</del>	Resource Names
		Project1	6 days		14/05/2018	21/05/2018		0 hrs	0%	
		Summary Task 1	6 days		14/05/2018	21/05/2018		0 hrs	0%	
		"Resource Bucke	6 days		14/05/2018	21/05/2018		0 hrs	0%	
		Task 1	2 days		14/05/2018	15/05/2018		0 hrs	0%	
			Summary Task 1	Summary Task 1     6 days       Summary Task 1     6 days       Resource Bucket     6 days	Summary Task 1 6 days Resource Bucke 6 days	Summary Task 1         6 days         14/05/2018           Resource Bucke         6 days         14/05/2018	Image: Symbol with the symbol withe symbol with the symbol with the symbol with the sym	Image: symbol with the symbol withe symbol with the symbol with the symbol with the symbol wi	Image: system         4 Project1         6 days         14/05/2018         21/05/2018         0 hrs           Image: system         4 Summary Task 1         6 days         14/05/2018         21/05/2018         0 hrs           Image: system         Image: system         6 days         14/05/2018         21/05/2018         0 hrs	Image: Symbol with the symbol withe symbol with the symbol with the symbol with the sym

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

am		esource Bucket"		Duration: 1 day?	÷ 🗹 <u>E</u> sti	imated
red	ecesso ID	rs: Task Name		Туре	Lag	^
	3	Task 1		Finish-to-Start (FS)	0d	
				Start-to-Start (SS)		
_				Start-to-Finish (SF)		
				(None)	1	
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Simplifying the journey

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

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		U		Task Name			<ul> <li>Duration</li> </ul>				Predeo	essors 👻		Complete 💌	Resource Names 👻 A					F S S		Ē
LL I	D						6 days		14/05/2018	21/05/2018			0 hrs									
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	5			Tas			2 days		18/05/2018		4		0 hrs									
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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

		0	Task Mode ▼	Task Name		Duration 👻	Start 👻	Finish 🔶	Predecessors 👻	Work 👻	% Complete 🔻	Resource Names 👻
-	0		-5	Project 1		6 days	14/05/2018	21/05/2018		42 hrs	0%	
CHART	1		-5	▲ Summary	Task 1	6 days	14/05/2018	21/05/2018		42 hrs	0%	
	2	2	-5	"Resou	rce Bucket"	6 days	14/05/2018	21/05/2018	355	42 hrs	0%	Business Analyst
GANTT	3		-5	Task 1		2 days	14/05/2018	15/05/2018		0 hrs	0%	
gA	4		-5	Task 2		2 days	16/05/2018	17/05/2018	3	0 hrs	0%	
	5		-5	Task 3		2 days	18/05/2018	21/05/2018	4	0 hrs	0%	
!	<u>N</u> ame Dat		esource Buck	et"	<u>C</u> onstraint		Effort driven	Manually Schedu	led P <u>r</u> evious	Ne <u>x</u> t		
	<u>S</u> tar	t: 1	14/05/2018	~	As Soon As Po	ssible	✓ Tas <u>k</u> ty	pe: Fixed Du	ration $\checkmark$			
	Fini	s <u>h</u> : 2	21/05/2018	~	Da <u>t</u> e: N	A	✓ W <u>B</u> S co	ode: 1.1				
© Current ○ Baseline ○ Actual Priority: 500 ★							% Co <u>m</u>	plete: 0%				
AILS FORM	ID     Resource Name     Units     Work     ID     Predecessor Name     Type     Lag       1     Business Analyst     100%     42h     3     Task 1     SS     0d								^			



Simplifying the journey

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

	0	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		-5	Summary Task 1	6 days	14/05/2018	21/05/2018		42 hrs	0%	
2	4		"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

	<u>N</u> ame:	"Resource Bucket"	Duration: 6 days	Effort driven Manually Scheduled	P <u>r</u> evious	Ne <u>x</u> t	
	Dates		<u>C</u> onstraint				
	<u>S</u> tart:	14/05/2018 🗸	As Soon As Possible	✓ Task type: Fixed Duration	n v		
Σ	Finis <u>h</u>	21/05/2018 ~	Da <u>t</u> e: NA	✓ W <u>B</u> S code: 1.1			
LS FORM	€ C <u>u</u>	rrent OBaseline OActual	Priority: 500	% Co <u>m</u> plete: 0%			
DETAILS	ID	Resource Name	Units Work ^	ID Predecessor Name	Туре	Lag	^
TASK DE	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

	Name: Resource Bucket	Duration: 6 days 📮 🖸 Effort driven 🗌 Manually Scheduled 🛛 📭	evious Ne <u>x</u> t	
	Dates	Constraint		
	<u>Start:</u> 14/05/2018 ~	As Soon As Possible $\checkmark$ Task type: Fixed Duration $\checkmark$		
Σ	Finis <u>h</u> : 21/05/2018 ~	Da <u>t</u> e: NA $\checkmark$ W <u>B</u> S code: 1.1		
LS FORM	● C <u>u</u> rrent ○ Base <u>l</u> ine ○ <u>A</u> ctual	Priority: 500 x % Complete: 0% x		
TAI	ID Resource Name	Units Work A ID Predecessor Name	Type Lag	^
DETAI	1 Business Analyst	50% 🚽 21h 3 Task 1	SS Od	
TASK				
F				

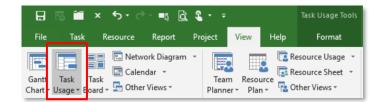


When the task is set to **Fixed Duration**, editing the **Work (hours)** will update the **Peak Units** % accordingly. Duration will always remain fixed.

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%)

0	Task Mode 🔻	Task Name 👻	Work 👻	Duration -	Start 👻	Finish 👻	Add New	Details	s	14 May M	18 T	w	т	F	s	s	21 May '18 M T
_		4 Project 1	21 hrs	6 days	14/05/2018	21/05/2018		Work		3.5h	3.5h	3.5h	3.5h	3.5h			3.5h
		Summary Task 1	21 hrs	6 days	14/05/2018	21/05/2018		Work		3.5h	3.5h	3.5h	3.5h	3.5h			3.5h
4		"Resource Bucket"	21 hrs	6 days	14/05/2018	21/05/2018		Work		3.5h	3.5h	3.5h	3.5h	3.5h			3.5h
		Business Analyst	21 hrs		14/05/2018	21/05/2018		Work		3.5h	3.5h	3.5h	3.5h	3.5h			3.5h
		Task 1	0 hrs	2 days	14/05/2018	15/05/2018		Work									
		Task 2	0 hrs	2 days	16/05/2018	17/05/2018		Work									

Note: MS Project assumes a flat work profile

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

	0	Task Mode ▼	Task Name 👻	Work 👻	Duration 🗸	Start 🗸	Finish 🗸	Add New	Details	s	14 May ' M	18 T	w	т	F	s	s	21 May '18 M
0			▲ Project 1	21 hrs	6 days	14/05/2018	21/05/2018		Work		3.5h	0h	7h	0h	7h			3.5h
1			Summary Task 1	21 hrs	6 days	14/05/2018	21/05/2018		Work		3.5h	0h	7h	0h	7h			3.5h
2	4		✓ "Resource Bucket"	21 hrs	6 days	14/05/2018	21/05/2018		Work		3.5h	0h	7h	0h	7h			3.5h
	1		Business Analyst	21 hrs		14/05/2018	21/05/2018		Work		3.5h	0h	7h	0h	7h			3.5h
	$\overline{}$		Task 1	0 hrs	2 days	14/05/2018	15/05/2018		Work									
1			Task 2	0 hrs	2 days	16/05/2018	17/05/2018		Work									
_																		_



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

uild Team for ProjectX							>
ilter enterprise resources							
Existing filters: Generic	~						
Customize filters (optional)							
Show resource availability							
Use project start and finish dates	om: Tue 01/05/	/18 🗸	To:	Thu 17/05/18 🗸			
Show resources with availability of or m							
	ore than: 0h	×				Apply	
Include proposed bookings						Арріј	У
uild team							
Group by:	~						
Group by: Enterprise Resource (2 found)	✓ Avail ∧		10	Project Resources	Booking	Work	1
Enterprise Resource (2 found)		Add >	• 2	Project Resources		Work 24h	
Enterprise Resource (2 found)		Add >	<b>6</b> • 4			24h	
Enterprise Resource (2 found) Business Analyst			2Å	Business Analyst Developer Digital	Committed	24h	
Enterprise Resource (2 found) Business Analyst			•2	Business Analyst	Committed	24h 0h	
Enterprise Resource (2 found) Business Analyst			23 23 23	Business Analyst Developer Digital	Committed Committed Committed	24h Oh Oh	
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Enterprise Resource (2 found) Business Analyst		< Remove Replace > < Match Details	23 23 23	Business Analyst Developer Digital Project Manager System Tester	Committed Committed Committed Committed Committed	24h Oh Oh Oh Oh	
Enterprise Resource (2 found) Business Analyst		< Remove Replace > < Match Details	23 23 23	Business Analyst Developer Digital Project Manager System Tester	Committed Committed Committed Committed Committed	24h Oh Oh Oh Oh	

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

Build Team for ProjectX						×
Filter enterprise resources Existing filters: Generic						
+ Customize filters (optional)						
Show resource availability						
Use project start and finish dates O From: Tue 01/05/	'18 V	To: Thu	17/05/18 🗸			
Show resources with availability of or more than: Oh	A					
Include proposed bookings	Ŧ				Appl	lv.
Build team						
Group by:						
Enterprise Resource (2 found)     Avail			Project Resources	Booking	Work	Т.
Enterprise Resource (2 found)     Avail     Avail     Avail	Add >	🔒	Project Resources	Booking	Work 24h	1
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Business Analyst	< Remove Replace > < Match Details	Deve Digit Digit Droji	ness Analyst eloper tal ect Manager em Tester	Committed Committed Committed Committed Committed	24h 0h 0h 0h 0h	

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



	0	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			4 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	355	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

	5 📁	∎ß \$	• ? • <b>E</b> =				Proje	ect 1 - Proje	ect Professional		<u>6</u> 0	
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- Select "Task Owner"
- Use this free text field to type in Task Owners against different tasks

