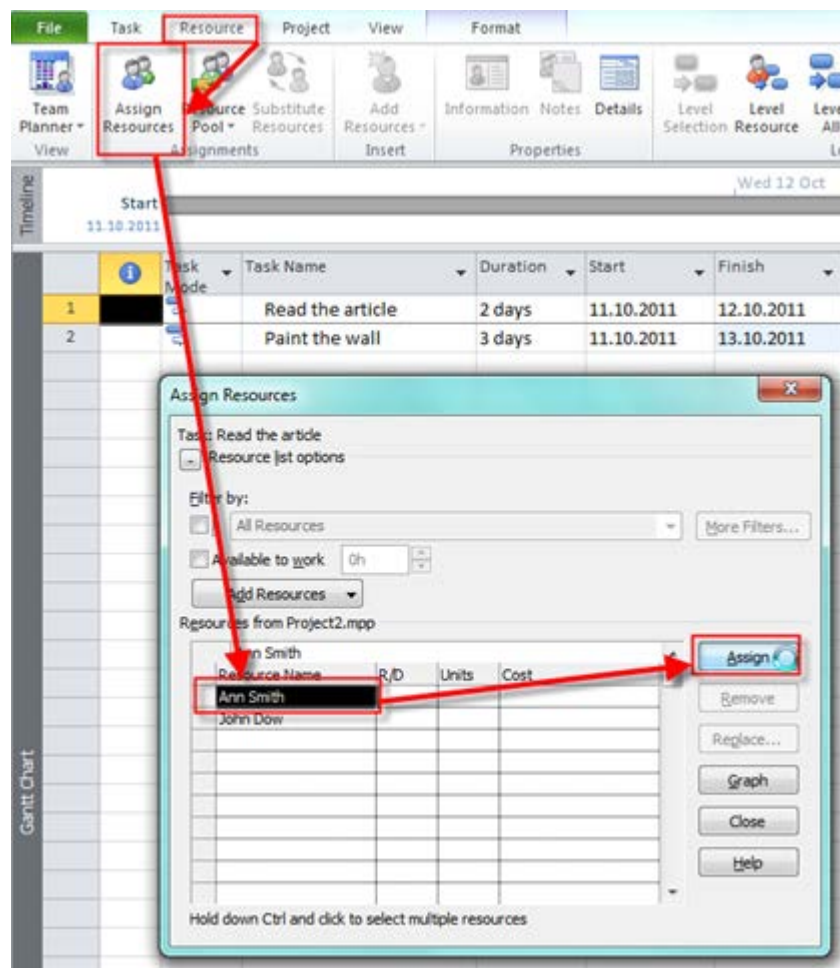


Assigning Resources to Tasks – Tips and Tricks

This article will demonstrate how can you add and assign a Resource at the same time in **MICROSOFT PROJECT**, how can you find a right Resource from a very long list of resource, and finally, how can you pick a resource by their availability

If you are assigning a Resource to a Task, and you don't have that Resource in your Resource sheet, you can do it during assigning. Let's say that we have two resources, Ann Smith and John Dow. We are assigning resources to the *Read the article* Task, and we found out that we need Ann Smith, and John Wayne, and the pair of Glasses, as Material Resources. First I will assign *Ann Smith*:



Now In the First **blank row** I will type John Wayne and press TAB key and I will get:

Assign Resources

Task: Read the article

☐ Resource list options

Filter by:

☐ All Resources More Filters...

☐ Available to work 0h

Add Resources

Resources from Project2.mpp

	Resource Name	R/D	Units	Cost
	John Wayne			
✓	Ann Smith		50%	\$800,00
	John Dow			
	John Wayne			

Assign
Remove
Replace...
Graph
Close
Help

Hold down Ctrl and click to select multiple resources

Since I cannot fill in this form all necessary details I will double click on John Wayne (or any other field in this row), and I will get:

Resource Information

General | Costs | Notes | Custom Fields

Resource name: John Wayne Initials: J

Email: john.wayne@western.yes Group: Cowboy

Windows Account... Code: ABC

Booking type: Committed Type: Work

Material label:

☐ Generic ☐ Budget

☐ Inactive

Change Working Time ...

Default Assignment Owner:

Resource Availability

NA	Available From	Available To	Units
NA	NA	NA	100%

Help Details... OK Cancel

On the General Tab I can fill information shown on the picture above. In the Costs Tab (shown below) I can fill Standard and Overtime Rate:

Resource Information

General

Costs

Notes

Custom Fields

Resource Name: John Wayne

Cost rate tables

For rates, enter a value or a percentage increase or decrease from the previous rate. For instance, if a resource's Per Use Cost is reduced by 20%, type -20%.

A (Default)

B

C

D

E

Effective Date	Standard Rate	Overtime Rate	Per Use Cost
--	\$100,00/h	\$150,00/h	\$0,00

Cost accrual: Prorated

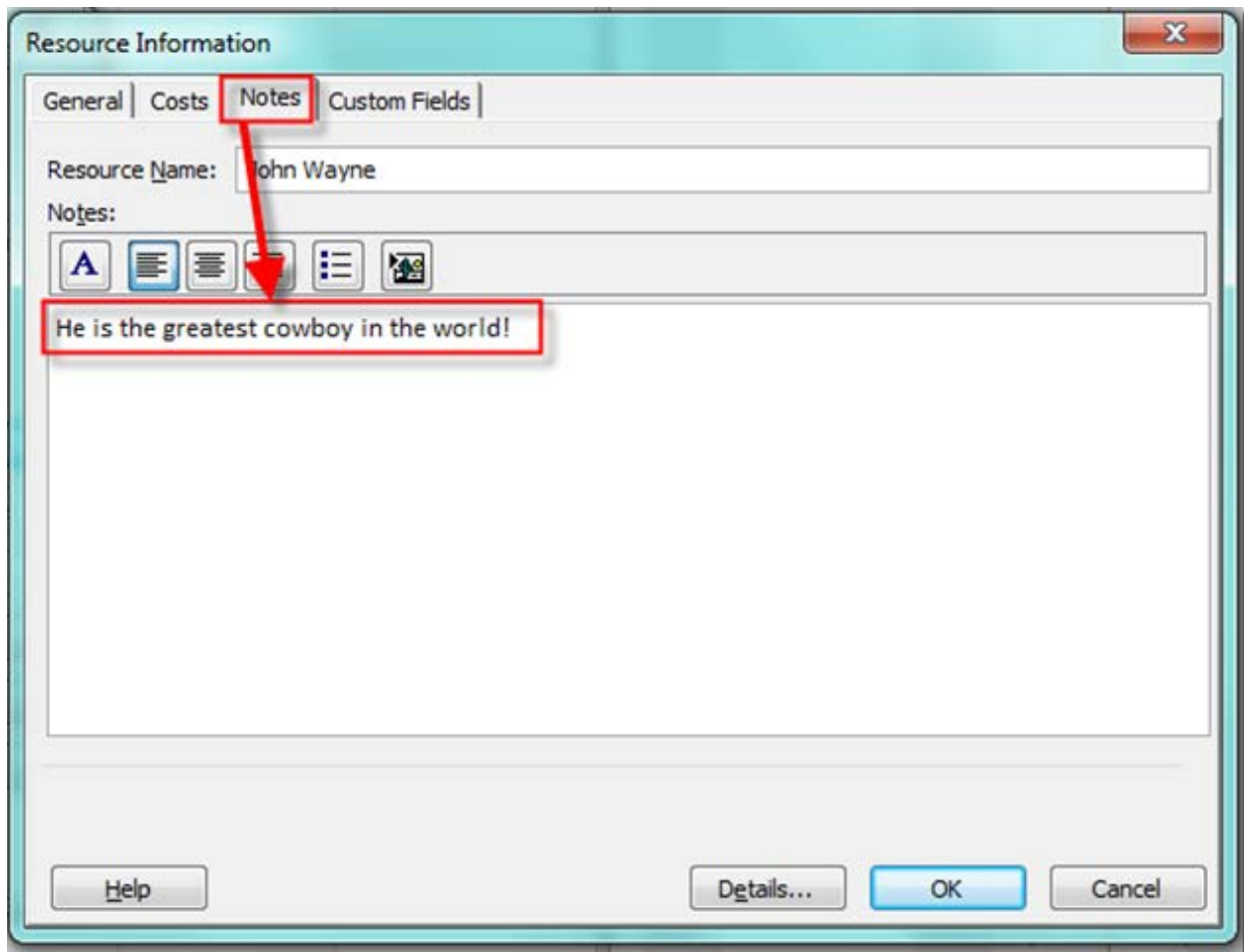
Help

Details...

OK

Cancel

and finally, on the Notes Tab I can put some notes:



The screenshot shows a 'Resource Information' dialog box with four tabs: 'General', 'Costs', 'Notes', and 'Custom Fields'. The 'Notes' tab is selected and highlighted with a red box. A red arrow points from the 'Notes' tab to the 'Notes' section. The 'Resource Name' field contains 'John Wayne'. The 'Notes' section has a toolbar with icons for text formatting (bold, italic, underline, bulleted list, numbered list, link, unlink) and a text area containing the note 'He is the greatest cowboy in the world!'. The text area and the note itself are also highlighted with a red box. At the bottom of the dialog are buttons for 'Help', 'Details...', 'OK', and 'Cancel'.

Resource Information

General | Costs | **Notes** | Custom Fields

Resource Name: John Wayne

Notes:

He is the greatest cowboy in the world!

Help Details... OK Cancel

Now I will assign John Wayne to the Task, and I will get:

Assign Resources [X]

Task: Read the article

☐ Resource list options

Filter by:

☐ All Resources [v] [More Filters...]

☐ Available to work 0h [v]

[Add Resources v]

Resources from Project2.mpp

	Resource Name	R/D	Units	Cost
✓	Ann Smith		50%	\$800,00
✓	John Wayne		100%	\$1.600,00
	John Dow			

[Assign] [Remove] [Replace...] [Graph] [Close] [Help]

Hold down Ctrl and click to select multiple resources

For the Glasses, the procedure is the same, and the only difference is that I have to mark it as a Material Resource:

The screenshot shows the 'Resource Information' dialog box with the 'General' tab selected. The 'Resource name' is 'The Glasses'. The 'Type' dropdown menu is open, showing options: Work, Material, and Cost. The 'Material' option is highlighted. A red arrow points from the 'General' tab to the 'Material' option.

Resource Information

General | Costs | Notes | Custom Fields

Resource name: The Glasses Initials: T

Email: Group:

Windows Account... Code:

Booking type: Committed Type: Work

Material Resource

Default Assignment Owner:

Resource Availability



NA	Available From	Available To	Units
NA	NA	NA	100%

Help Details... OK Cancel

Change Working Time ...

☐ Inactive

Now suppose that you have a long list of Resources (hundreds of them). It will be very difficult and complicated to choose the right one, and it will be very easy to make a mistake. Suppose that this is the list of your resources:

Resource Sheet			Resource Name ▾	Type ▾	Material ▾	Initials ▾	Group ▾	Max. ▾	Std. Rate ▾
	1		Ann Smith	Work		A	Design	50%	\$100,00/hr
	2		John Dow	Work		J	Marketing	100%	\$200,00/hr
	3		John Wayne	Work		J	Cowboy	100%	\$100,00/hr
	4		The Glasses	Material		T	Design		\$150,00
	5		John	Work		J	Vendor	100%	\$10,00/hr
	6		Mary	Work		M	Design	100%	\$20,00/hr
	7		Paul	Work		P	Marketing	100%	\$30,00/hr
	8		Anna	Work		A	Marketing	100%	\$40,00/hr
	9		Mark	Work		M	Cowboy	100%	\$50,00/hr
	10		Jim	Work		J	Design	100%	\$60,00/hr
	11		Josh	Work		J	Vendor	100%	\$70,00/hr
	12		Becky	Work		B	Marketing	100%	\$80,00/hr
	13		Rose	Work		R	Vendor	100%	\$90,00/hr
	14		Michelle	Work		M	Vendor	100%	\$100,00/hr
	15		Nenad	Work		N	Marketing	100%	\$110,00/hr
	16		Renata	Work		R	Cowboy	100%	\$120,00/hr
	17		Marc	Work		M	Design	100%	\$130,00/hr
	18		Bricks	Material	piece	B	Marketing		\$1,00
	19		Concrete	Material	ton	C	Vendor		\$2,00
	20		Books	Material	piece	B	Vendor		\$3,00
	21		Newspapers	Material	piece	N	Design		\$4,00

If I need, for example, only Material Resources for my *Read the article* Task, I will apply the filter:

The screenshot displays the Microsoft Project interface. The 'Resource' tab is selected in the ribbon. The 'Assign Resources' button is highlighted. Below, the 'Assign Resources' dialog box is open, showing the 'Filter by' dropdown menu. The 'Resources - Material' option is selected in the list. The background shows a Gantt chart with tasks 'Read the article' and 'Paint the wall'.

Task ID	Task Name	Duration	Start	Finish
1	Read the article	2 days	11.10.2011	12.10.2011
2	Paint the wall	3 days	11.10.2011	13.10.2011

Assign Resources Dialog Box Details:

- Task: Read the article
- Resource list options: ☒ All Resources
- Filter by: ☒ All Resources
- Resources - Material (selected)

and I will get:

Assign Resources

Task: Read the article

☐ Resource list options

Filter by:

☒ Resources - Material More Filters...

☐ Available to work 0h

Add Resources

Resources from Project2.mpp

Resource Name	R/D	Units	Cost
Books			
Bricks			
Concrete			
Newspapers			
The Glasses			

Assign
Remove
Replace...
Graph
Close
Help

Hold down Ctrl and click to select multiple resources

As you can see, I get only the Material Resources. That was easy. But, what If I want to choose only Resources from the Marketing department. And this is written in the *Group* field.

I will also apply a filter, but it is not on my list:

The screenshot shows the Microsoft Project interface with the 'Resource' tab selected in the ribbon. The 'Assign Resources' dialog box is open, showing the task 'Read the article' and a list of resources from 'Project2.mpp'. The 'More Filters...' button is highlighted. Below it, the 'More Filters' dialog box is open, showing a list of filters. The 'Group...' filter is selected, and the 'Apply' button is highlighted.

Assign Resources Dialog Box:

- Task: Read the article
- Resource list options: ☐ Resource list options
- Filter by: ☒ All Resources
- Available to work: ☐ 0h
- Add Resources:
- Resources from Project2.mpp:

Resource Name	R/D	Units	Cost
Ann Smith			
Anna			
Becky			

- Buttons: Assign, Remove, Replace...

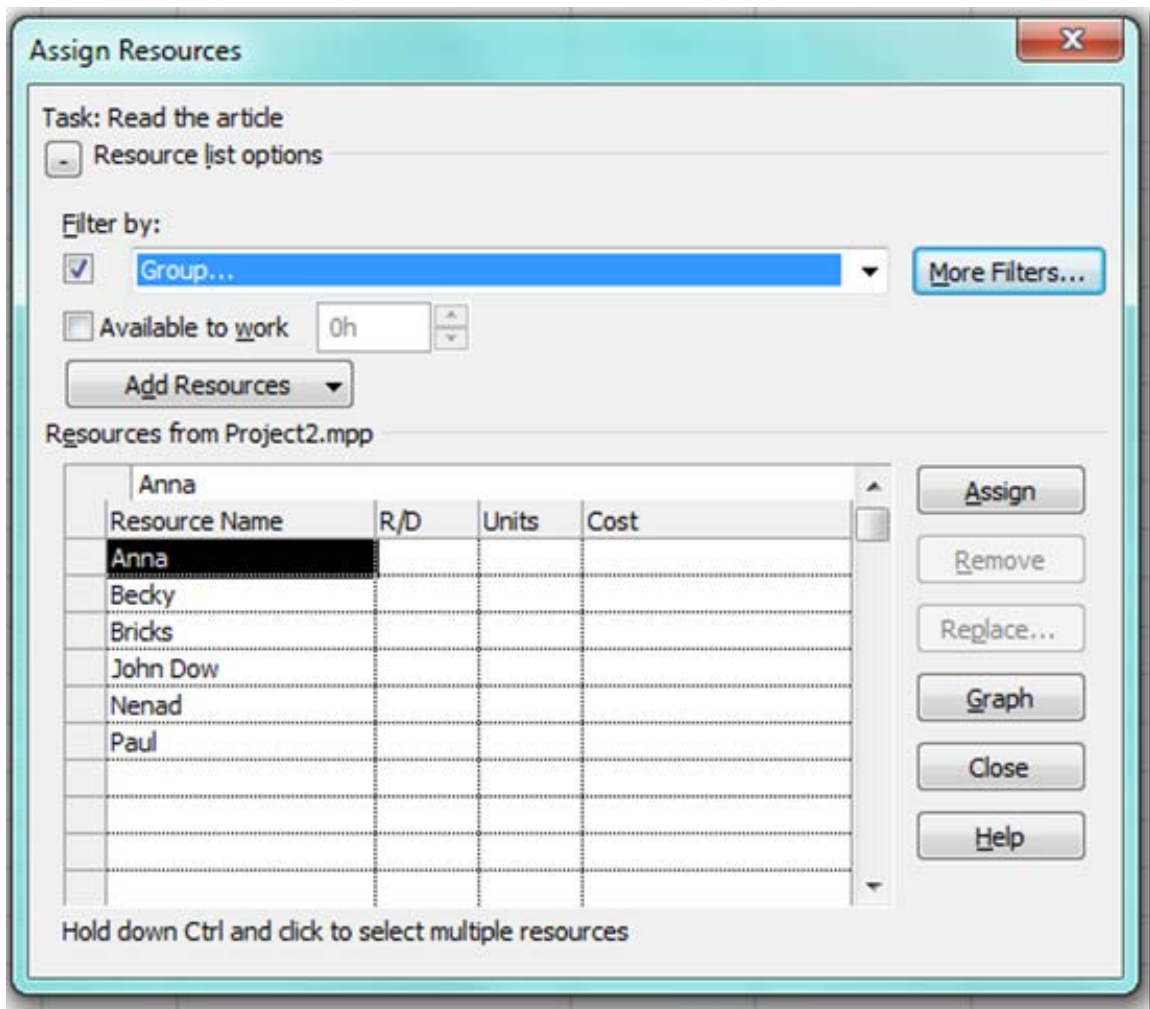
More Filters Dialog Box:

- Filters: ☐ Task ☒ Resource
- Filter list: All Resources, Budget Resources, Cost Greater Than..., Cost Overbudget, Created After..., Date Range..., Filter 1, **Group...**, In Progress Assignments, Linked Fields, Non-budget Resources, Overallocated Resources, Resource Range..., Resources - Cost
- Buttons: New..., Edit..., Copy..., Organizer..., Help
- Bottom buttons: Highlight, **Apply**, Cancel

Whenever you see three dots (like Group...), you will have to enter the selection criteria. So, after I applied the *Group* filter I will get:

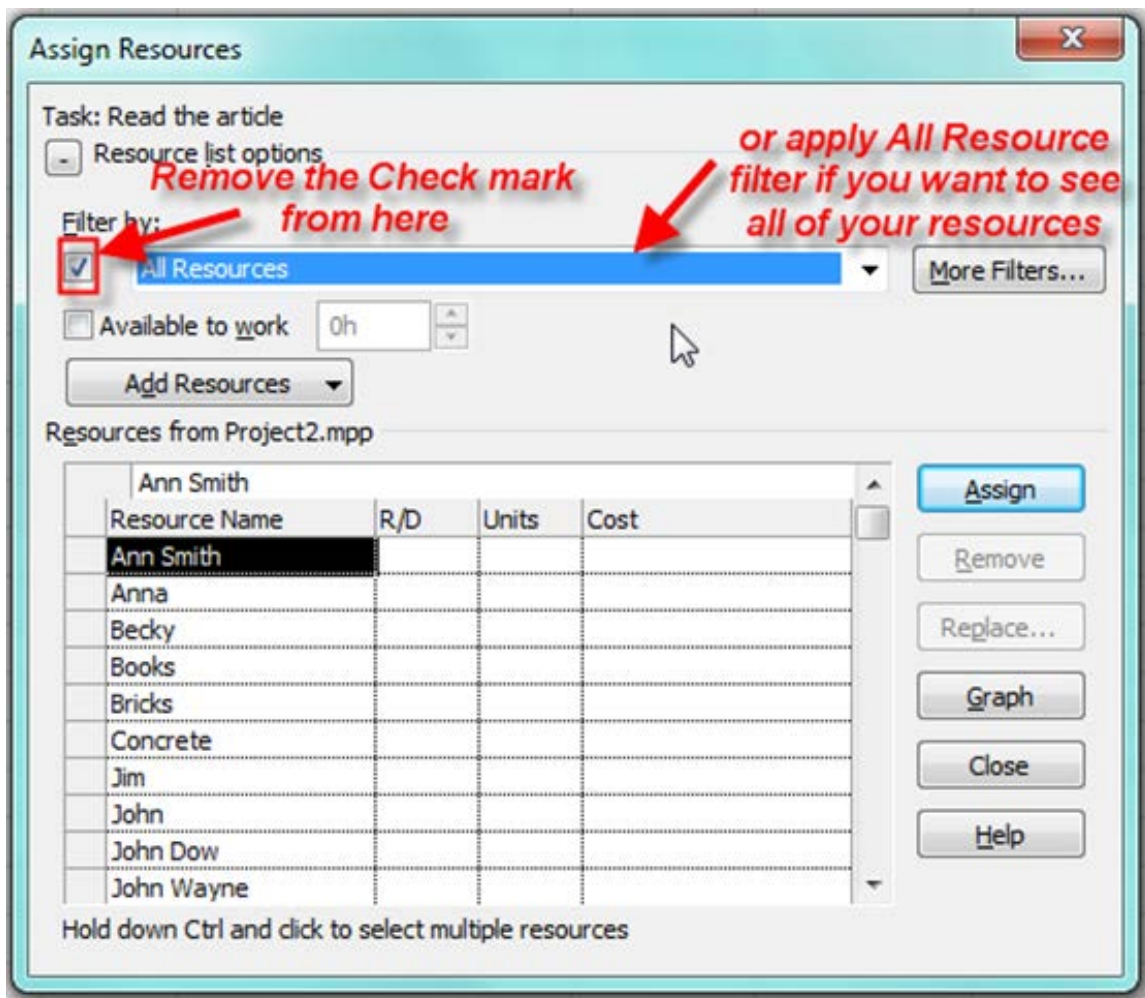


and after that I will get:



I've got all the Resources from Marketing department.

Do not forget to turn of the filter in your assignment if you want to see all resources, or apply *All Resource filter*:



Now suppose that I have those resources for the project:

Resource Name	Type	Material	Initials	Group	Max.	Std. Rate	Ovt. Rate
Ann Smith	Work		A	Design	50%	\$100,00/hr	\$200,00/hr
John Dow	Work		J	Marketing	100%	\$200,00/hr	\$300,00/hr
John Wayne	Work		J	Cowboy	100%	\$100,00/hr	\$150,00/hr

I will assign Ann Smith with 25%, and John Dow with 75% to the *Read the article* Task:

The screenshot shows the Microsoft Project interface with the 'Resource' tab selected in the ribbon. The 'Assign Resources' button is highlighted with a red box. Below the ribbon, a Gantt chart shows two tasks: 'Read the article' (Task 1) and 'Paint the wall' (Task 2). The 'Assign Resources' dialog box is open, showing the task 'Read the article' and a list of resources. The resources listed are Ann Smith (25%), John Dow (75%), and John Wayne. The 'Assign' button is visible on the right side of the dialog box.

Resource Name	R/D	Units	Cost
✓ Ann Smith		25%	\$400,00
✓ John Dow		75%	\$2.400,00
John Wayne			

If I assign them to the *Paint the Wall* Task with their max units (Ann has 50%, and John 100%) they will become over allocated. Now suppose that for the *Paint the Wall* I need a resource who is available 3 days. Of course, I can first apply filter (with, for example, *PAINTERS* code), and then find resource by

their availability. But for this example, let's say that I want to find out who is available for 3 days from all of my resources:

The screenshot shows the Microsoft Project interface with the 'Assign Resources' dialog box open. The dialog box is titled 'Assign Resources' and shows the task 'Paint the wall'. The 'Filter by' dropdown is set to 'All Resources'. The 'Available to me' checkbox is checked. The 'Add Resources' button is visible. The 'Resources from Project2.mpp' list shows 'Ann Smith', 'John Dow', and 'John Wayne'. The 'Assign' button is highlighted. A red arrow points from the 'Assign Resources' button in the ribbon to the dialog box. Another red arrow points from the 'Paint the wall' task in the Gantt chart to the 'Filter by' dropdown. A red box highlights the 'Available to me' checkbox, and another red box highlights the '1' in the availability field. A red arrow points from the text 'Enter the availability that you want from your resources!' to the availability field.

Task: Paint the wall

Resource list options

Filter by:

☒ All Resources ☐ Available to me More Filters...

Add Resources

Resources from Project2.mpp

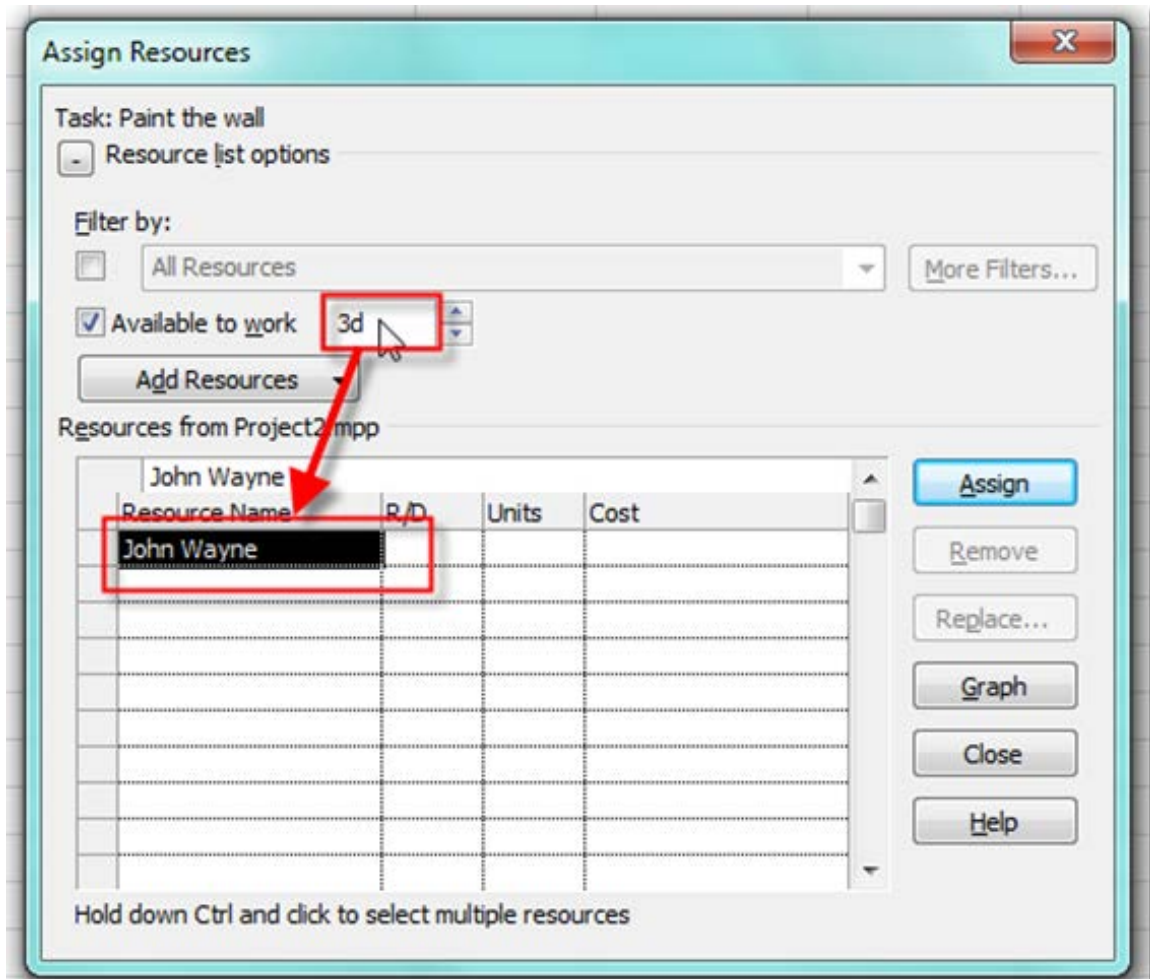
Resource Name	R/D	Units	Cost
Ann Smith			
John Dow			
John Wayne			

Assign Remove Replace... Graph Close Help

Hold down Ctrl and click to select multiple resources

Enter the availability that you want from your resources!

I will put 3d in that field, and I will get:



As you already know, only John Wayne is available for 3 days.