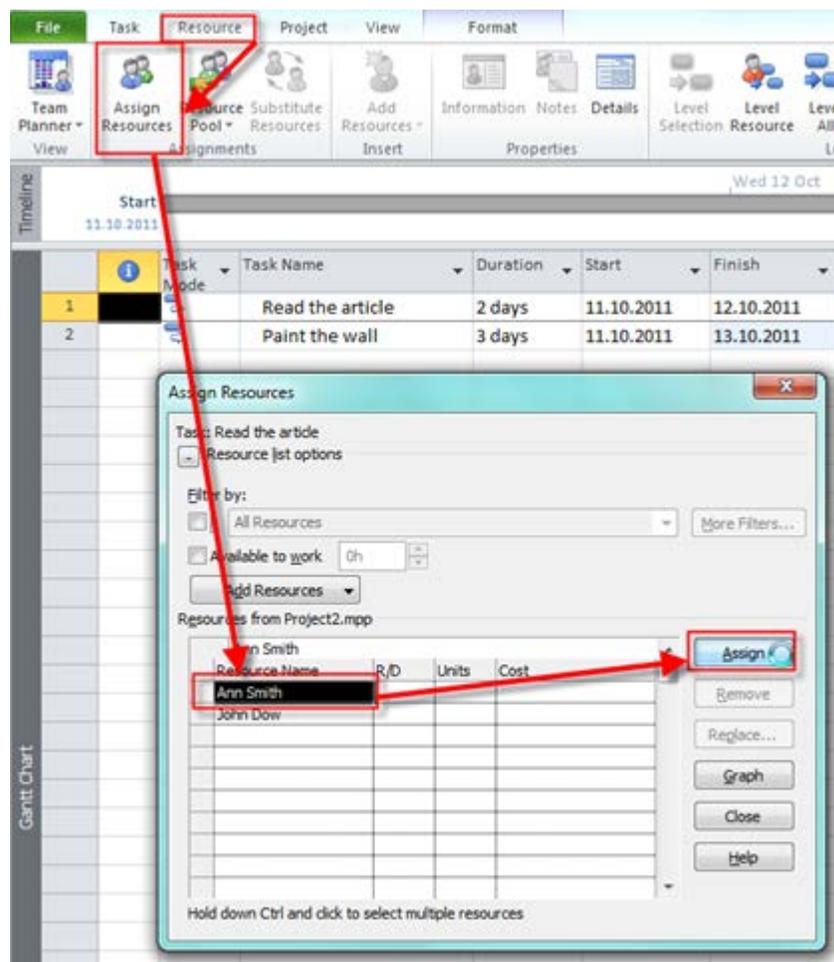


# Assigning Resources to Tasks – Tips and Tricks

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:

Task: Read the article

Resource list options

Filter by:

All Resources More Filters...

Available to work 0h

Resources from Project2.mpp

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

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:

The screenshot shows the 'Resource Information' dialog box with the 'General' tab selected. The following fields are highlighted with red boxes:

- General tab
- Resource name: John Wayne
- Email: john.wayne@western.yes
- Booking type: Committed
- Initials: J
- Group: Cowboy
- Code: ABC
- Type: Work
- Units in the Resource Availability table (100%)

NA	Available From	Available To	Units
NA	NA	NA	100%

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%.

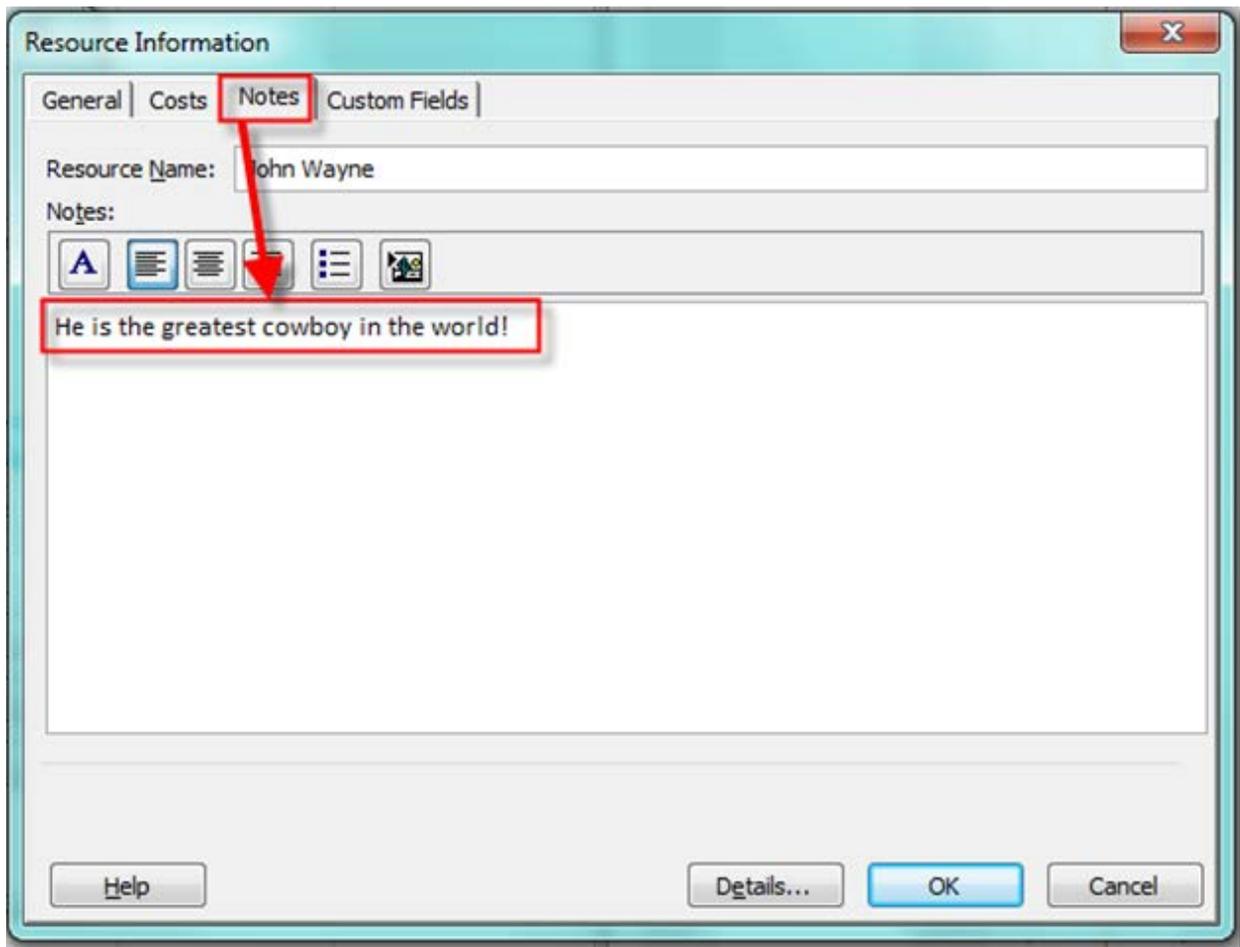
A (Default) B C D E

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:



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

Assign Resources

Task: Read the article

Resource list options

Filter by:

All Resources More Filters...

Available to work 0h

Resources from Project2.mpp

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

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 'Type' dropdown menu is open, and the 'Material' option is highlighted. A red arrow points from the 'General' tab to the 'Material' option.

Resource name: The Glasses  
Initials: T  
Email:   
Group:   
Code:   
Booking type: Committed  
Type: Work  
Material Resource  
Cost  
 Inactive  
Change Working Time ...

Default Assignment Owner:   
Resource Availability

NA	Available From	Available To	Units
NA	NA	NA	100%

Buttons: Help, Details..., OK, Cancel

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 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

Resource Sheet

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

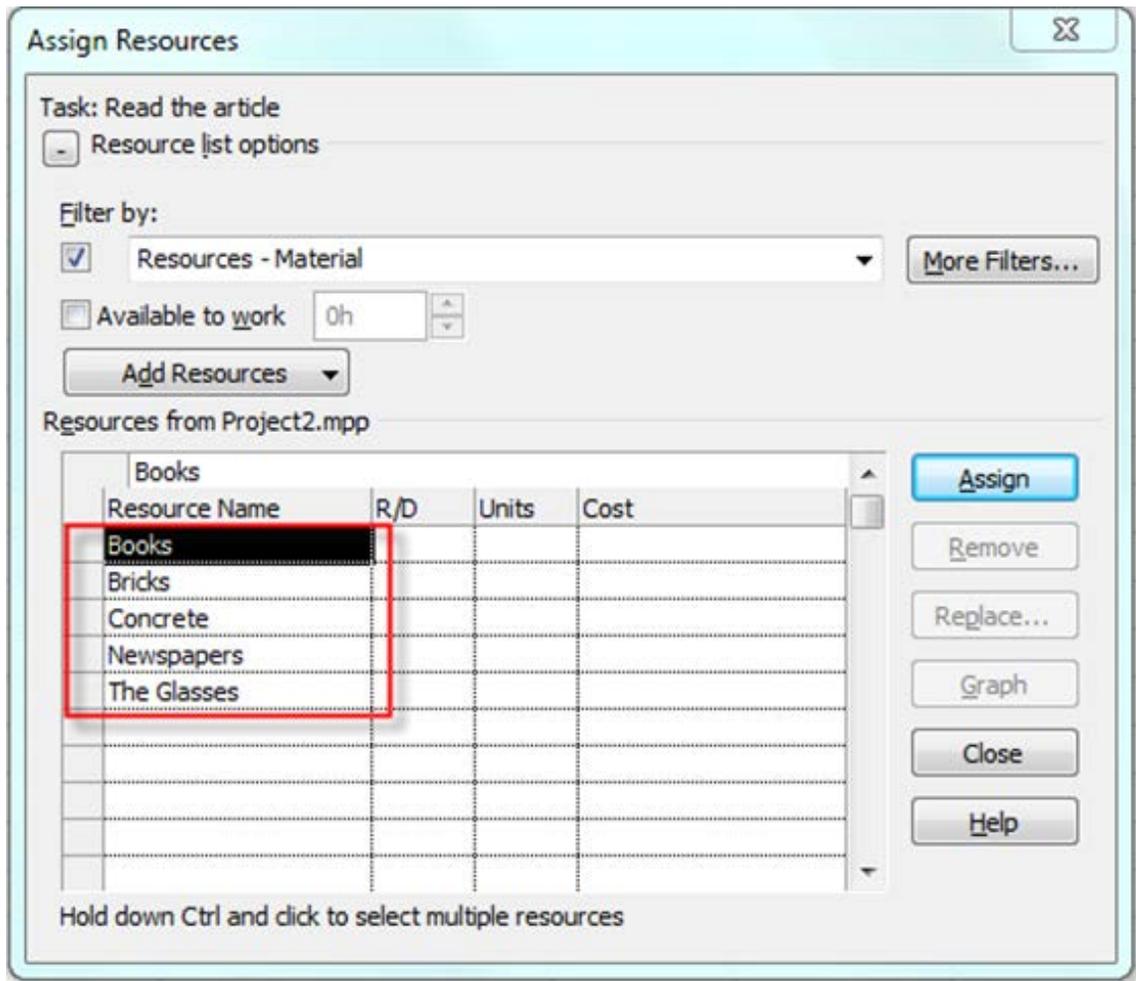
The screenshot displays the Microsoft Project interface. The 'Resource' tab is active in the ribbon, and the 'Assign Resources' button is highlighted. Below the ribbon, a Gantt chart shows two tasks: 'Read the article' (Task 1) and 'Paint the wall' (Task 2). The 'Assign Resources' dialog box is open, showing the task 'Read the article' and a list of filters. The 'Filter by' section is expanded, and 'Resources - Material' is selected. The 'Assign' button is visible on the right side of the dialog box.

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: -
- Filter by:  All Resources (selected)
- Resources list: Resources - Material (selected)
- Buttons: Assign, Remove, Replace..., Graph, Close, Help

and I will get:



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 displays the Microsoft Project interface. The ribbon is set to 'Resource', and the 'Assign Resources' button is highlighted. Below the ribbon, a Gantt chart shows two tasks: 'Read the article' (2 days, 11.10.2011 to 12.10.2011) and 'Paint the wall' (3 days, 11.10.2011 to 13.10.2011). The 'Assign Resources' dialog box is open for the task 'Read the article'. It shows a list of resources from 'Project2.mpp' including Ann Smith, Anna, and Becky. The 'More Filters...' button is highlighted. The 'More Filters' dialog box is also open, showing a list of filters under the 'Resource' tab. The 'Group...' filter is selected and highlighted. The 'Apply' button is highlighted.

Task Mode	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**

Task: Read the article

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			

**More Filters**

Filters:  Task  Resource

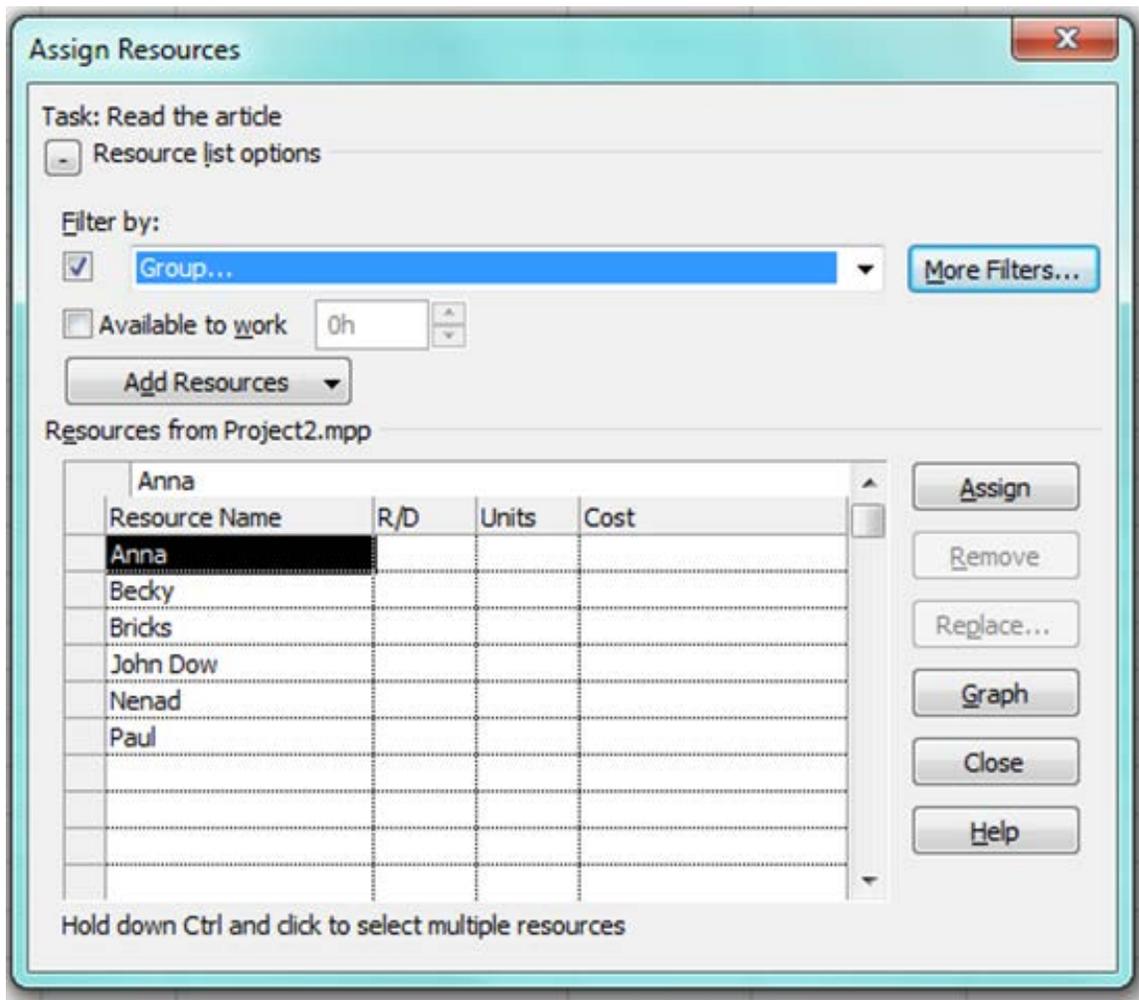
- All Resources
- Budget Resources
- Cost Greater Than...
- Cost Overbudget
- Created After...
- Date Range...
- Filter 1
- Group...
- In Progress Assignments
- Linked Fields
- Non-budget Resources
- Overallocated Resources
- Resource Range...
- Resources - Cost

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:

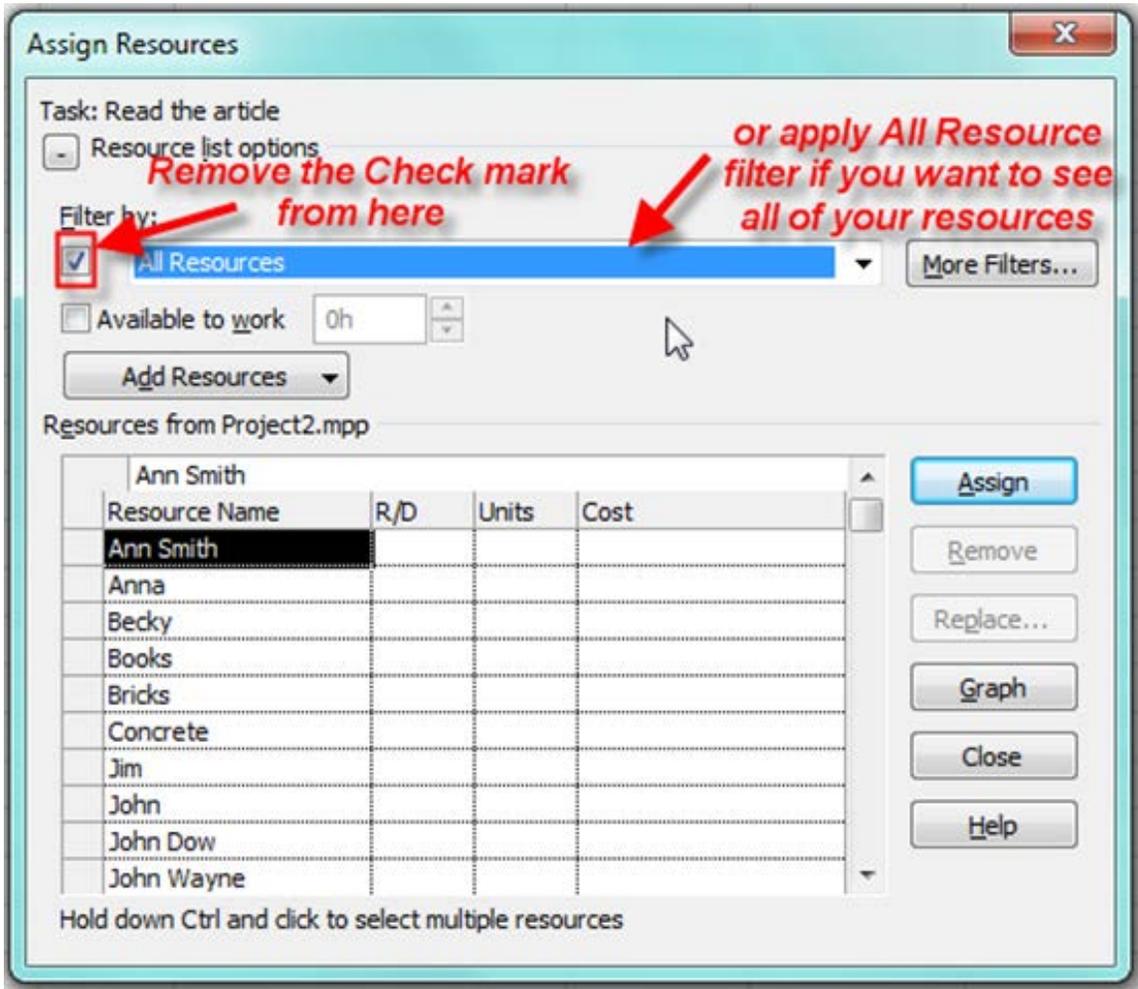


and after that I will get:



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 resource list is as follows:

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

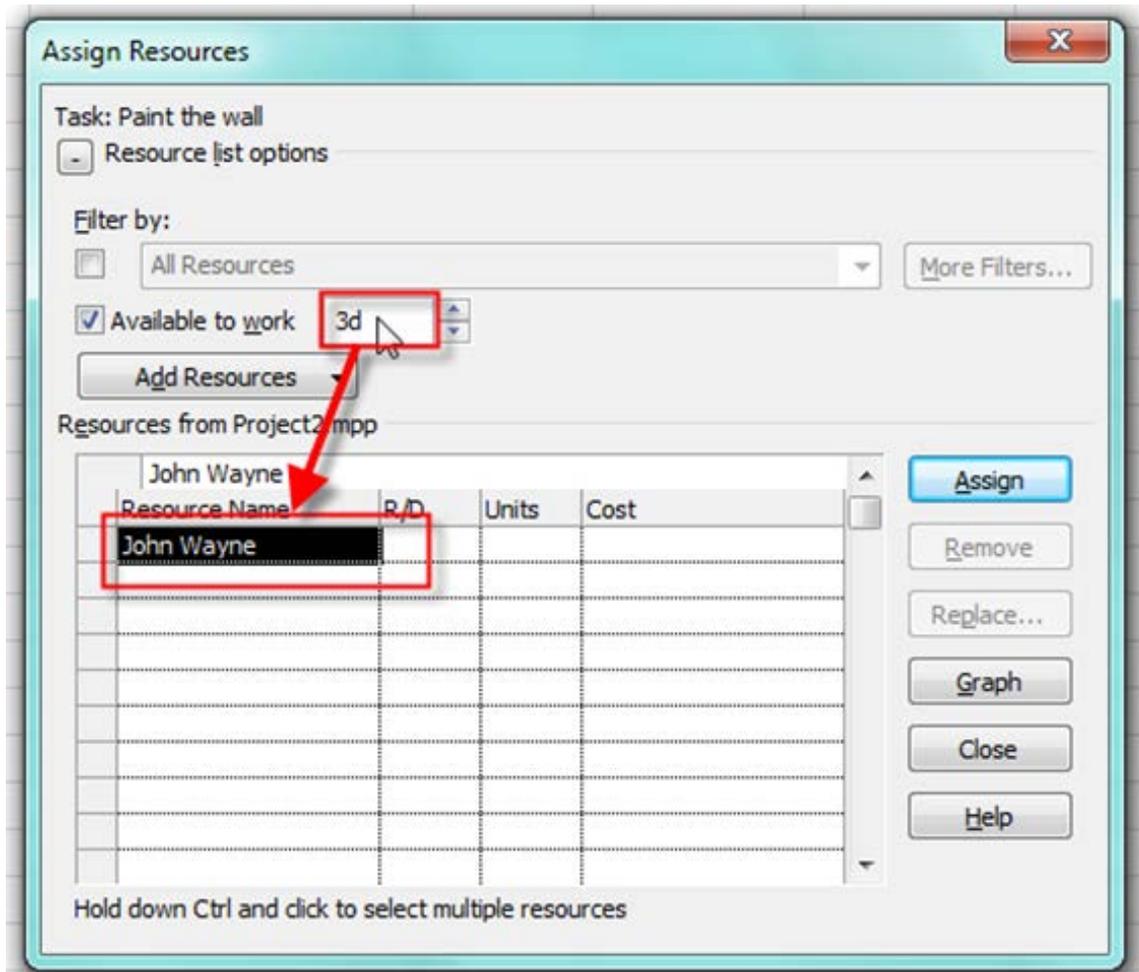
their availability. But for this example, let's say that I want to find out who is available for 3 days from all of my resources:

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' section has 'Available to use' checked. The 'Resources from Project2.mpp' list includes Ann Smith, John Dow, and John Wayne. The 'Availability' input field is set to 1. A red text box with an arrow pointing to the input field says 'Enter the availability that you want from your resources!'.

Task ID	Task Name	Duration	Start	Finish	Predecessors
1	Read the article	3 days	11.10.2011	18.10.2011	
2	Paint the wall	3 days	11.10.2011	13.10.2011	

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

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



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