



Professional Series

Focus on:
Technology

Best for:
*Project
Managers*

*Resource
Managers*

Schedulers

Microsoft Project Server 2013

Project Manager's Guide

**Updated
to PMBOK
5th ed.**



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Chapter 6

Resource Management in Project Pro

sample





	 Task Name	Durat	Type	Effort Driven	Work
1	Infrastructure Deployment	194.75 d	Fixed Duration	No	2,682 hrs
2	Scope	6 days	Fixed Duration	No	24 hrs
3	Determine project scope	0 days	Fixed Work	Yes	0 hrs
4	 Secure project sponsorship	1 day	Fixed Work	Yes	8 hrs
5	 Define preliminary resources	1 day	Fixed Work	Yes	8 hrs
6	 Secure core resources	1 day	Fixed Work	Yes	8 hrs

Figure 6-3 Entry Table with Work Column

To follow this approach, insert the **Work** column into the **Entry Table** of **Gantt Chart** view. This is where you will enter your total Work estimate.

Do not enter anything in the Duration column. This value is now being calculated based on the resources assigned.



For a more detailed discussion of Task Types, refer to the Advisicon books *Introduction to Scheduling with Microsoft Project: Best Practices from Project MVPs* and *Advanced Scheduling with Microsoft Project: Power Scheduling from Project MVPs*.

Building a Team of Resources

As a project manager, you need to build a team of resources for each specific project. Project Pro's **Build Team from Enterprise** feature allows you to build a team of resources from the Enterprise Resource Pool and use them for task assignments on the current project.

Although the entire Enterprise Resource Pool is available on every project, it is not efficient to continually update each project with the complete list.

Doing so slows down system performance, including project publishing. The project team is a short list of resources that will be used for this one project specifically, and is more efficient for browsing project resources. Building a team is typically done right before assignments are made. Additional resources are added throughout the project when needed.



If you want your team of resources to include generic resources, refer to *Using Generic Resources* on page 92.

To build a team of resources:

- 1. Navigate to Project Professional.
- 2. In the **File** tab, click **Open**.
- 3. Click the desired project and click **Open**.
- 4. In the **Resource** tab, in the **Insert** group, click the **Add Resources** dropdown and then click **Build Team from Enterprise**.

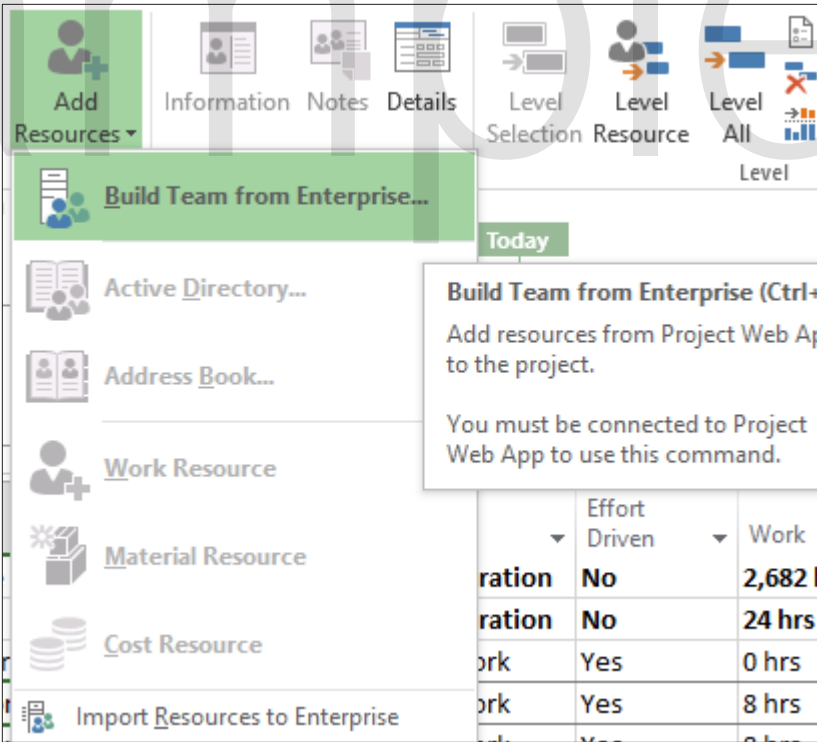


Figure 6-4 Add Resources List

5. In the **Build Team** dialog box, select the desired Enterprise Resource(s) on the left and click **Add** from the middle section.

Build Team for _Infrastructure Deployment

Filter enterprise resources

Existing filters: All Resources (No Filter)

+ Customize filters (optional)

☐ Show resource availability

☒ Use project start and finish dates ☐ From: Thu 7/25/13 To: Wed 4/23/14

☐ Show resources with availability of or more than: 0h

☐ Include proposed bookings

Apply

Build team

Group by:

Enterprise Resource (123 found)	Avail
Aaron Painter	
Accountant	
Adam Barr	
Alex Darrow	
Alex Simmons	
Amy Alberts	
Amy Wachsnicht	
Analyst	
Ari Bixhorn	
Bonnie Kearney	
Brian Groth	
Brian Johnson	
Building and Facilities	

Add >

< Remove

Replace >

< Match

Details...

Graphs...

Project Resources	Booking	Work
Analyst	Committed	1,132h
Jesse Phillips-Mead	Committed	0h
PMO	Committed	40h
Procurement Manager	Committed	200h
Project Manager	Committed	532h
Sara Davis	Committed	16h
Test Guy	Committed	320h
Tester	Committed	442h
Tye Trepanier	Committed	0h

Help

OK Cancel

Figure 6-5 Build Team Dialog in Project Professional

6. Click **OK**.

The resources you have selected for this project are listed on the Resource Sheet or on the right side of the Build Team dialog box.



Using Generic Resources

A **generic resource** is a resource that has been created for the purpose of resource planning and it typically represents a job role, job title, or skill set. If you are unsure which individuals will be available for your project, you can select generic resources to help plan the resource needs for the project. Later, when you know who your resources are, these generic resources will be replaced with actual resources.

Generic resources are frequently used when planning activities that are far into the future or during the project proposal stage. Generic resources are selected from the Enterprise Resource Pool and added to your project.



Your project team can include both generic and named enterprise resources.

To build a team of generic resources:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.
4. In the **Resource** tab, in the **Insert** group, click the **Add Resources** dropdown and then click **Build Team from Enterprise**.
5. In the Build Team dialog box, click the dropdown arrow next to **Group by:** and click **Generic**.
6. Under **Enterprise Resources**, click the minus (-) symbol next to **No**. Notice that this hides non-generic resources.
7. Select the desired generic Enterprise Resource(s) on the left and click **Add**.
8. Click **OK**.

Assigning Resources with the Resource Names Column

Assigning resources to tasks is the process of picking resources from the project team to work on specific tasks. Assignments allow team members to view tasks they have been assigned on their Tasks page in PWA.

To assign resources to tasks:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.
4. In the **Task** tab, **View** group, click **Gantt Chart**.
5. Scroll or drag the dividing bar until the **Resource Names** column is visible.
6. For the desired task, in the **Resource Names** cell, click the drop-down list and click the checkmark next to the desired resources you want to assign to the task.

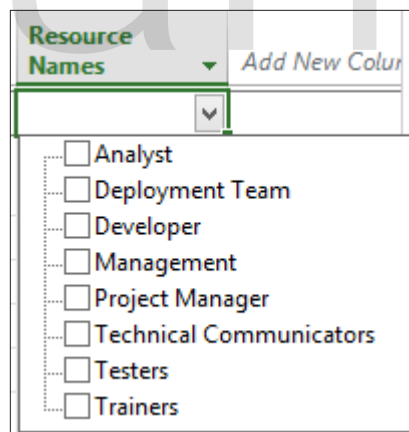


Figure 6-6 Resource Names Task Assignment Dropdown List



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