# **Techniques to Assign Resources**

Project provides multiple techniques to assign resources to tasks. Some methods are very quick, while other methods are more involved. Each method has advantages and disadvantages. You should decide which approach you prefer when making an assignment.

Tip – Task Entry view or a custom Entry table with added columns are preferred when you want to see Duration, Work, Task Type, and Effort Driven fields displayed at the same time.

## **Assignments Using the Resource Names Column**

This technique is the quickest way to make an assignment; however, additional options such as units and work for the resource are not editable.

1. Click the Tasktab
2. Click Gantt Chart in the View group
3. For the desired task, click the drop-down arrow in the **Resource Names** column and click to assign each desired resource

## **Assignments Using Task Information**

This technique is also a fast way to make an assignment. It is especially useful when working with cost resources so you can enter the value following the assignment.

1. Click the Tasktab
2. Click Gantt Chart in the View group
3. Double-click the desired task
4. Click the Resources tab
5. On a blank row, click the drop-down arrow in the Resource Name column and click to assign one resource
6. Modify the values in Units or Cost if desired
7. Repeat if needed
8. Click OK

## **Assignments Using the Assign Resources Dialog Box**

This technique is a good way to make an assignment when you want to assign one resource to multiple tasks or multiple resources to multiple tasks. The dialog box remains open after you complete an assignment to allow you to immediately make an additional assignment. Either a Work or Units value can be manually entered in the Units field if desired when assigning a resource.

1. Click the Tasktab
2. Click Gantt Chart in the View group
3. Click the Resource tab
4. Click Assign Resources in the Assignments group
5. Highlight the desired tasks, highlight the desired resources and click Assign
6. Modify the Units value if desired
7. Repeat if needed
8. Click Close when done

Tip – Use the SHIFT key to select adjacent tasks or resources. Use the CTRL key to select non-adjacent tasks or resources.

## **Assignments Using Task Entry View**

This technique is a good way to make an assignment when you want to focus on one task but create one or several resource assignments. It is a useful view because both the Work and Units fields are displayed an editable if desired. This option allows you to make multiple changes before you trigger the recalculation by Project. Notice the OK button is shown which indicates Project is waiting for you to finish your edits.

1. Click the Tasktab
2. Click the drop-down arrow on Gantt Chart in the View group
3. Click More Views
4. Click Task Entry in the Views list
5. Click Apply
6. Click the desired task in the upper pane
7. On a blank row, click the drop-down arrow in the Resource Name column and click to assign one resource
8. Modify the values in Units or Work if desired
9. Repeat if needed
10. Click OK

Tip – Clicking another task or pressing the ENTER key twice on the keyboard is the same as clicking the OK button.