eBooks on desktop editions/versions
(Standard/Professional 2010 and later)

Understanding Initial Assignments

in Microsoft® Office Project

by Examples

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About the Author

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INTRODUCTION

This eBook presents quick reference guides listing assignment models in order to help MS Project users with understanding how MS Project calculates the scheduling parameters while they perform initial assignments of single or multiple resources to the tasks in various scenarios. By the help of these guides, the users can easily create resource assignments, based on their estimations, that best fit their projects' requirements.

All the steps to develop these guides are explained in detail and supported by the demonstrations. Therefore, the readers (i.e., MS Project users) would be able to verify all the user interface operations and the results on their desktop computers running MS Project's desktop editions/versions. Not just the guides, but you also need to review these steps as well to understand MS Project's behavior in the initial assignments.

The content also includes information on how to adjust and/or edit the assignments in various scenarios during both planning and implementation phases of the projects. This eBook simply aims to enable the users to have full control over the assignment operations, and at the same time, make the process easier for them.

This eBook assumes that the readers are currently using MS Project in planning, scheduling and managing projects and already familiar with defining and assigning resources to the tasks in the desktop edition/version of the product used. The eBook also assumes that the readers, as MS Project users, have a working knowledge of the scheduling formula (i.e., the work formula), the task types, the effort-driven scheduling and the hierarchy among the calendars.

All the resources mentioned in the scenarios discussed are the work type resources (i.e., Type=<Work>). All resource calendars are the unmodified Standard calendar unless stated otherwise. Any instance of the term "assignment" in this eBook refers to a resource assignment. Any discussions on the task assignments, the costs associated with the resources, the resource leveling feature, the resource contouring feature, the resource pool feature, overtime work, scheduling the shifts, and the reports are out of scope of this eBook. All the tasks used in the demonstrations are automatically scheduled tasks. No models ignoring the resource calendars will be discussed in this eBook.

There are several features to make the resource assignments in MS Project (e.g., using the buttons or the drag-and-drop feature in the Assign Resources dialog box, selecting the resources from the checkboxes listed in the dropdown menu opened by clicking the task line cells in the Resource Names column, using the Resources tab of the Task Information dialog box, and so on), but we are going to intentionally use a combination view such as the Task Entry view or the one composed of the Task Usage and Task Form views in the demonstrations since they offer more visibility and control over the assignment operations.

One quick reminder before getting started: turning off the checkbox "Automatically add new resources and tasks" (see the Advanced tab in the Project Options dialog box) avoids creating new resources by typo while entering resource names by typing in. No worries about the new tasks since "Insert Assignment" command is grayed out in the shortcut menu opened by clicking an assignment in the Usage views in later editions/versions of the product.

Reference Guide: Single Resource Assignments

INITIAL ASSIGNMENT MODELS WITH SINGLE RESOURCES AT VARIOUS CAPACITIES, DEFAULT, SPECIFIED or CALCULATED		
SCHEDULING QUESTION	ENTER / DO THIS	TO CALCULATE THIS
How much effort of a resource is required to complete a task in the given **duration** ?	**Duration** **Assignment Units** (or Default Units)	**Assignment Work**
How long does it take for a resource to complete a task that requires the given amount of task **work** or resource **effort** ?	**Task** or **Assignment Work** **Assignment Units** (or Default Units)	**Duration**
How much capacity of a resource is to be allocated for completing the given amount of **task work** in the given **duration** ?	**Duration** **Task Work** [Fixed Duration]	**Assignment Units**