

Replacing roles with named resources and baseline

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Introduction

This document explores project baseline and replacing roles with named resources.

Test project

For testing a small project is created. The project has two tasks and two roles assigned to the tasks. Additionally there two named resources with zero allocation in the project team. The project is baselined.

<input type="checkbox"/>	Name	Role	Start	Finish	Actuals	ETC	Base Sum
<input type="checkbox"/>	Task1		1/1/13	1/31/13	0.00	100.00	100.00
<input type="checkbox"/>	↳ Business Analyst, Senior	Business Analyst, Senior	1/1/13	1/31/13	0.00	100.00	100.00
<input type="checkbox"/>	Task2		1/25/13	2/28/13	0.00	100.00	100.00
<input type="checkbox"/>	↳ Developer	Developer	1/25/13	2/28/13	0.00	100.00	100.00

Total Results: 4

Assign Replace Remove [Configure]

Fig Test project baselined

Project Team											[--Actions--]
Filter System Default											
<input type="checkbox"/>	Resource	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation		
<input type="checkbox"/>	Business Analyst, Senior	Business Analyst, Senior	✓	Soft	New	1/1/13	6/30/13	100.0%	1,032.00		
<input type="checkbox"/>	Developer	Developer	✓	Soft	New	1/1/13	6/30/13	100.0%	1,032.00		
<input type="checkbox"/>	Thibault, Mike (Board)		✓	Soft	New	1/1/13	6/30/13	0.0%	0.00		
<input type="checkbox"/>	VanArsdale, Steve (Board)		✓	Soft	New	1/1/13	6/30/13	0.0%	0.00		

Total Results: 4

Add Add/Update by OBS Remove More>>

Fig The project team

Replacing roles in Clarity

Resource replacements can be done on the Team page in Clarity. Click the magnifying glass next to the role (resource) name to be replaced to open Resource Finder window.



Fig Open Resource Finder

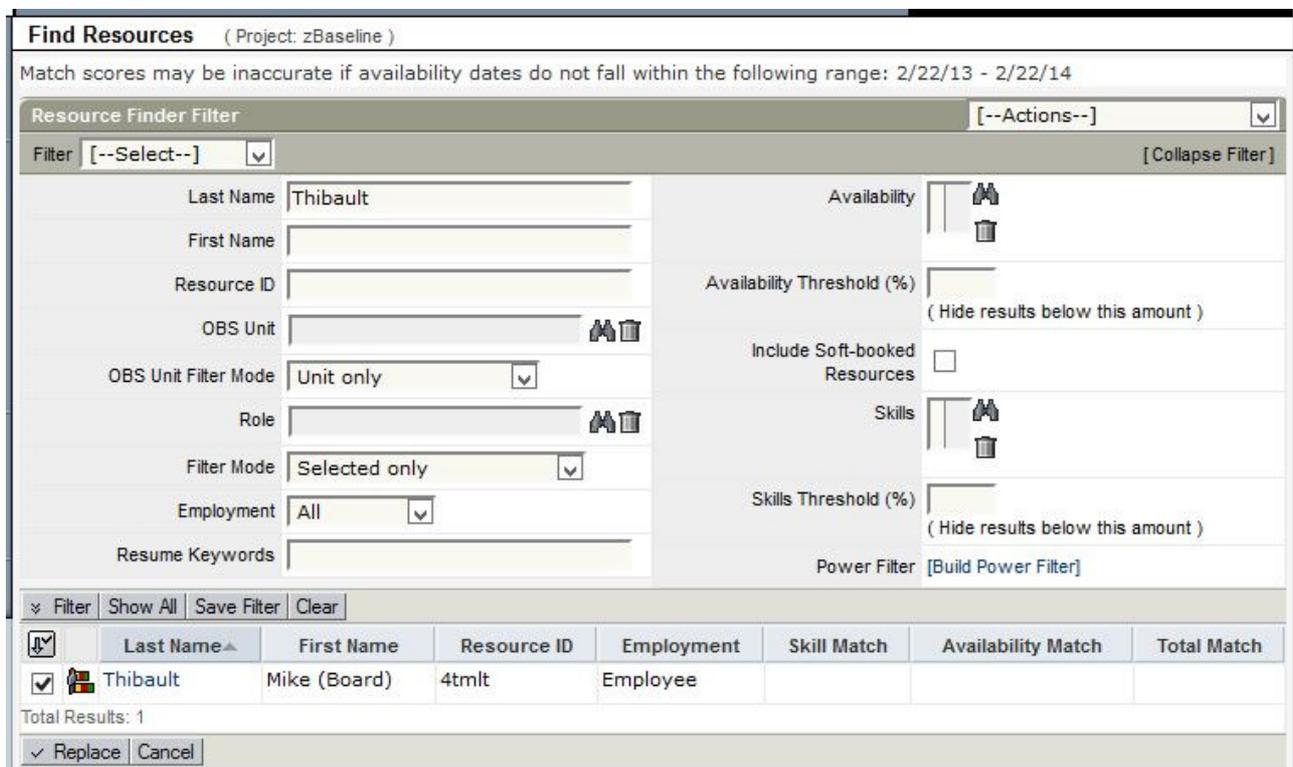


Fig Resource Finder

Filter the for the replacement resource check the box and click Replace. Notice that there are no options so there is only one way to transfer and all assignments are transferred.

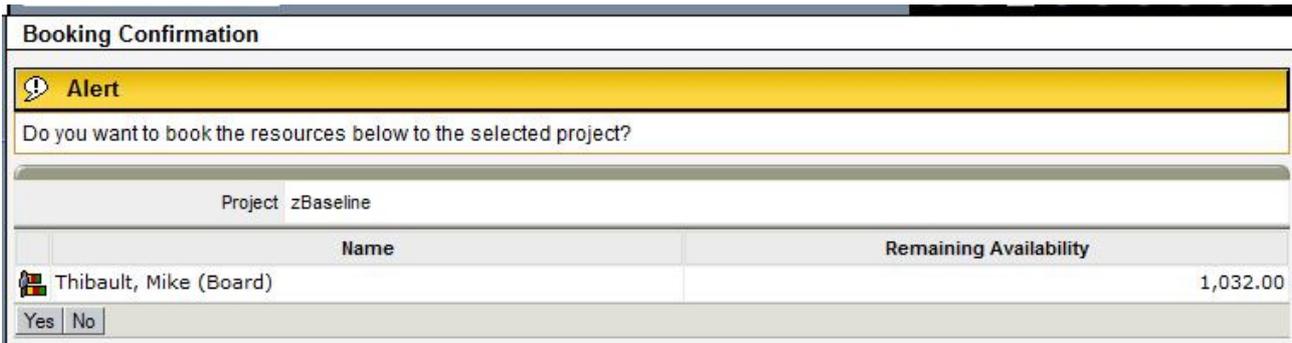


Fig Final warning

When the role is replaced the allocation and the ETC are transferred to the replacement resource.

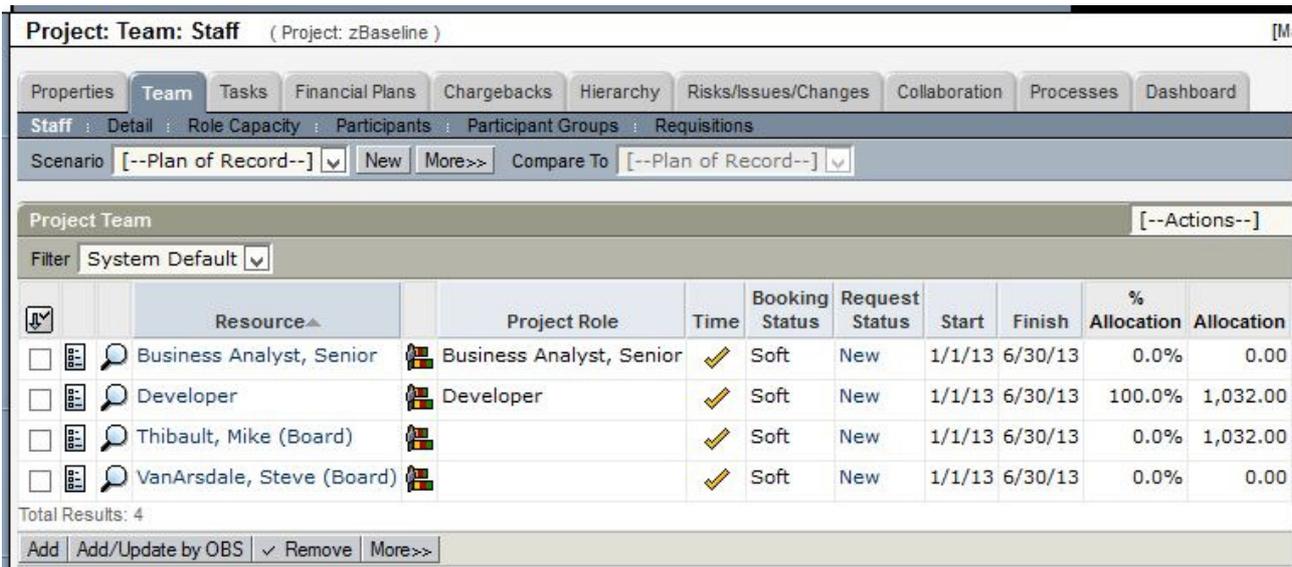


Fig The project team after the Anlyst is replaced with resource Mike Thibault.

The replacing a role with a named resource transfers the assignment, but if the transfer is done in Clarity there are no changes in the baselines.



Fig The project baseline after the Anlyst is replaced with resource Mike Thibault.

Replacing roles in OWB

In Open Workbench the baseline is the same of course, but OWB offers more options in the area of transfer assignments.

Name	Name	Name	Baseline Usa					
		Rate	Res	Ass	Aggr	Task	Task aggr	200,00
Task1		Business Anal	100,00	100,00	100,00	100,00	100,00	
Task2		Developer	100,00	100,00	100,00	100,00	100,00	
					200,00		200,00	
csk.busine	Business Analyst, Senior	\$0,00	\$0,00					
			\$0,00					
csk.devel	Developer	\$0,00	\$0,00					
			\$0,00					
srva	VanArsdale, Steve (Board)	\$0,00	\$0,00					
4tmt	Thibault, Mike (Board)	\$0,00	\$0,00					

Fig The project baseline in OWB after the Anlyst is replaced with resource Mike Thibault.

In OWB the functionality used is Transfer Assignments and it is accessed from the Tools menu

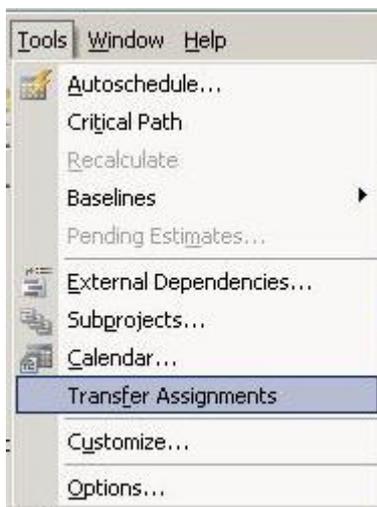


Fig OWB Transfer Assignments in Tools menu.

When assignments are transferred first the source resource or role is chosen. Next the target resource is chosen.

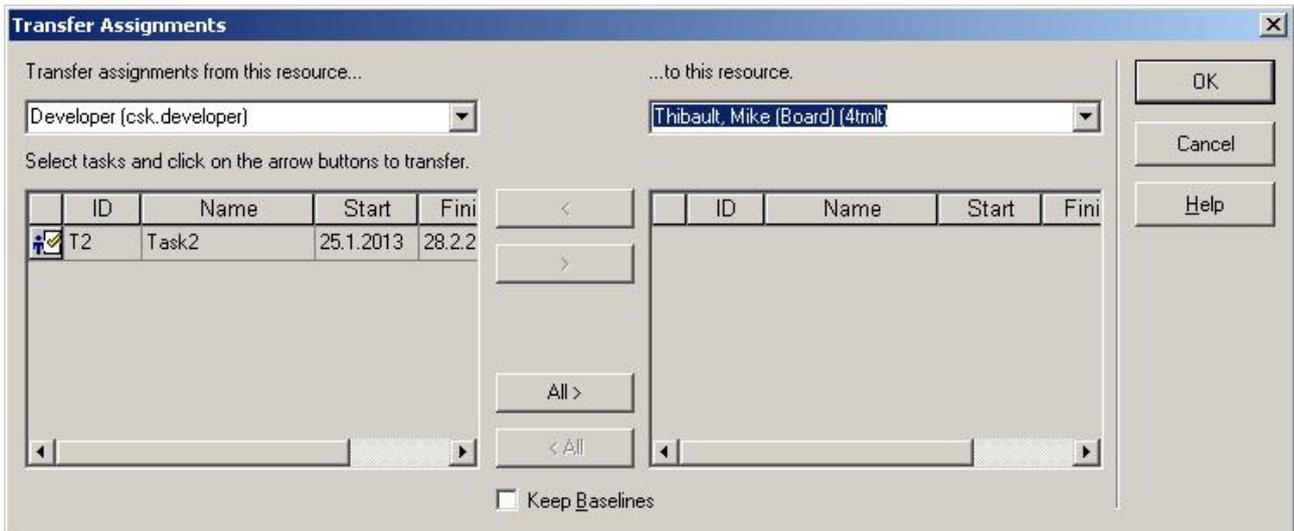


Fig Select resources/roles for transfer or assignments.

Next the assignments are chosen. Either double click the assignment to from one resource to the other or select and use the arrows to move. Finally select whether or not to keep the Baselines. If you choose to keep the baselines the baseline data is also transferred to the target resource. If choose not to, that means not ie. the baseline data for the assignments to be transferred is dropped.

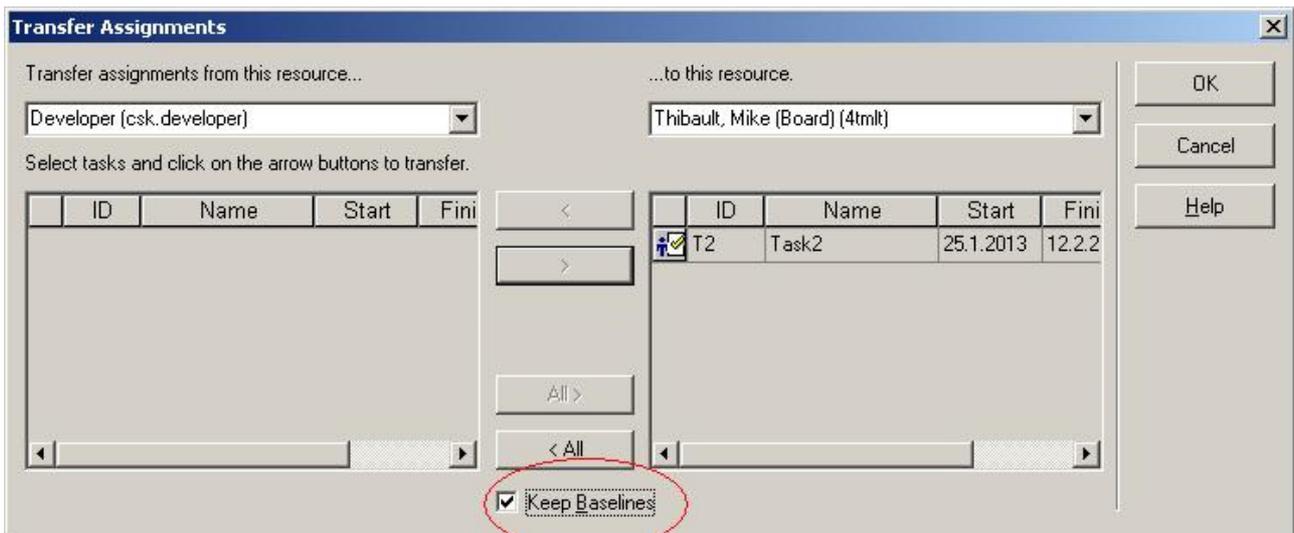


Fig Select the assignments to be transferred and how the baseline data is to be handled.

If you look at the OWB view in the background you can see that the view displays the transfers as if they had already been made. That is not the case. The transfers are actually made first when you click OK. If you click Cancel. No changes are made.

In the Baseline view it can be seen that the baseline data is transferred to the traget resource when the transfer of the assingments is made in OWB and Keep Baselines option is selected.

Name	Name	Name	Baseline Usa	200,00				
		Rate	Res	Ass	Aggr	Task	Task aggr	
Task1	Business Anal	100,00	100,00	100,00	100,00	100,00	100,00	
Task2	Thibault, Mike					100,00		
					100,00		100,00	
csk.busine	Business Analyst, Senior	\$0,00	\$0,00					
csk.devel	Developer	\$0,00	\$0,00					
srva	VanArsdale, Steve (Board)	\$0,00	\$0,00					
4tmt	Thibault, Mike (Board)	\$0,00	\$0,00					

Fig Baseline data is also transferred

Before you close the project in OWB you must save it back to Clarity or otherwise the changes are lost. Also you must have the modify baseline right (which the project manager normally has).

After saving the project back to Clarity, the baseline data in Clarity is the same as in OWB: the baseline data is transferred from the role to the named resource.

Name	Role	Start	Finish	Actuals	ETC	Base Sum
<input type="checkbox"/> Task1		1/1/13	1/31/13	0.00	100.00	100.00
<input type="checkbox"/> Business Analyst, Senior	Business Analyst, Senior	1/1/13	1/31/13	0.00	100.00	100.00
<input type="checkbox"/> Task2		1/25/13	2/12/13	0.00	100.00	
<input type="checkbox"/> Thibault, Mike (Board)		1/25/13	2/12/13	0.00	100.00	

Total Results: 4

Assign Replace Remove [Configure]

Fig Baseline data in Clarity

Conclusion

When roles/resources are replaced in Clarity the assignments are transferred, but the baseline data is not transferred.

When roles/resources are replaced in OWB the assignments are transferred and the user has the option to transfer also the baseline data.

VERSIONS

v.01 May 12, 2013 MKi the first draft

The content of these pages is presented as personal views only and not as any sort of advice or instruction.