

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.



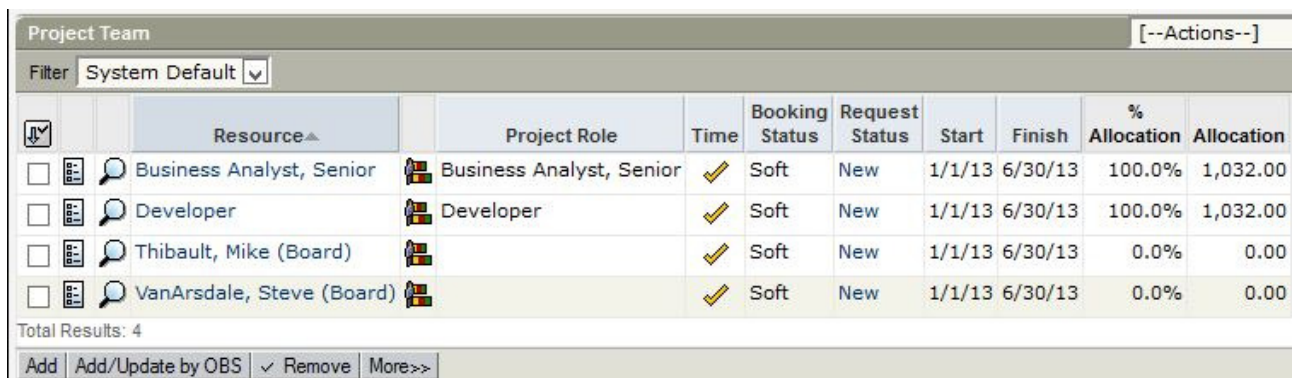
The screenshot shows a table with columns: Name, Role, Start, Finish, Actuals, ETC, and Base Sum. It lists two tasks, Task1 and Task2, each with a role assigned. Task1 is assigned the role 'Business Analyst, Senior' and Task2 is assigned the role 'Developer'. Both tasks have a start date of 1/1/13 and a finish date of 1/31/13. The 'Actuals' column shows 0.00 for all entries. The 'ETC' column shows 100.00 for all entries. The 'Base Sum' column shows 100.00 for all entries. Below the table, there are buttons for 'Assign', 'Replace', and 'Remove', and a '[Configure]' link.

	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



The screenshot shows a table titled 'Project Team' with columns: Resource, Project Role, Time, Booking Status, Request Status, Start, Finish, % Allocation, and Allocation. It lists four resources: 'Business Analyst, Senior', 'Developer', 'Thibault, Mike (Board)', and 'VanArsdale, Steve (Board)'. The first two resources have a 100.0% allocation and a total allocation of 1,032.00. The last two resources have a 0.0% allocation and a total allocation of 0.00. The 'Time' column shows 'Soft' for all resources. The 'Request Status' column shows 'New' for all resources. The 'Start' and 'Finish' dates are 1/1/13 and 6/30/13 respectively. Below the table, there are buttons for 'Add', 'Add/Update by OBS', 'Remove', and 'More>>'. The total results are 4.

	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

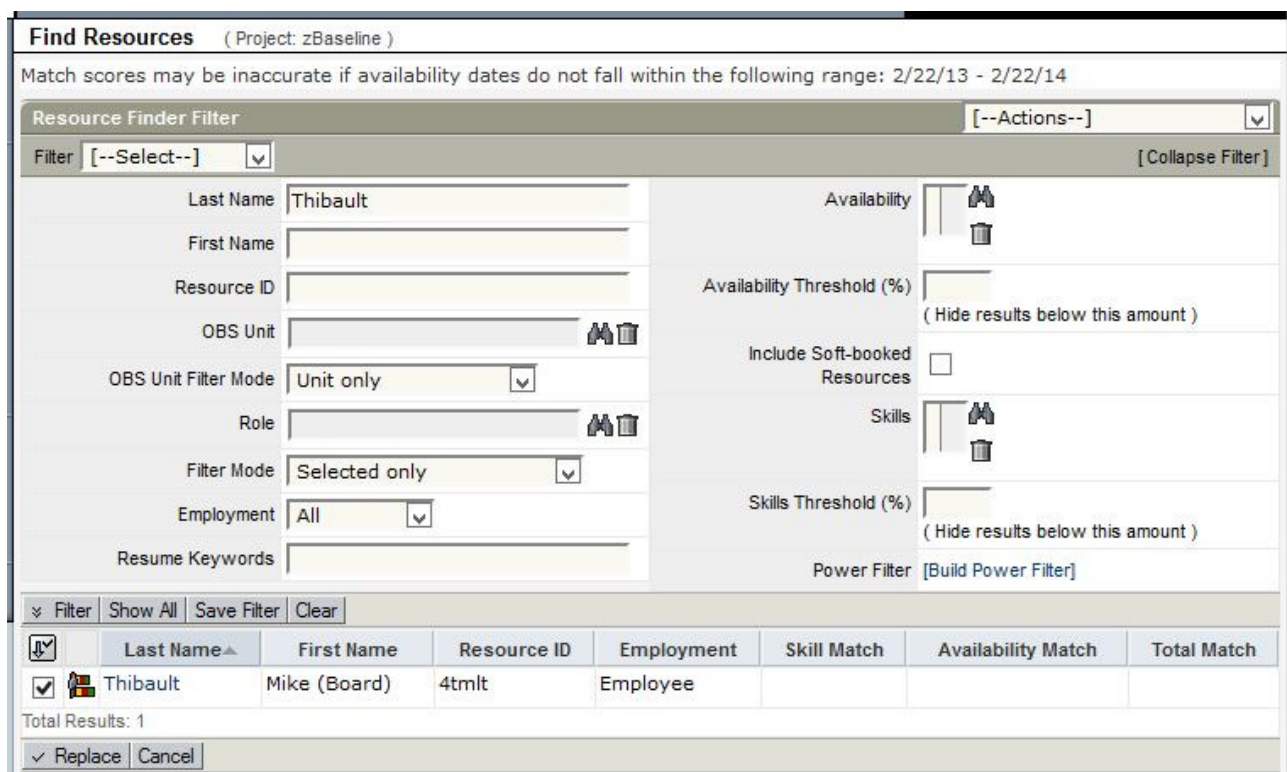


Fig Resource Finder

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.

Booking Confirmation

Alert

Do you want to book the resources below to the selected project?

Project: zBaseline

Name	Remaining Availability
Thibault, Mike (Board)	1,032.00

Yes No

Fig Final warning

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

Project: Team: Staff (Project: zBaseline) [M]

Properties **Team** Tasks Financial Plans Chargebacks Hierarchy Risks/Issues/Changes Collaboration Processes Dashboard

Staff : Detail : Role Capacity : Participants : Participant Groups : Requisitions

Scenario [--Plan of Record--] New More>> Compare To [--Plan of Record--]

Project Team [--Actions--]

Filter System Default

	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	0.0%	0.00
<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%	1,032.00
<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 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.

	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 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.

[illegible]

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

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

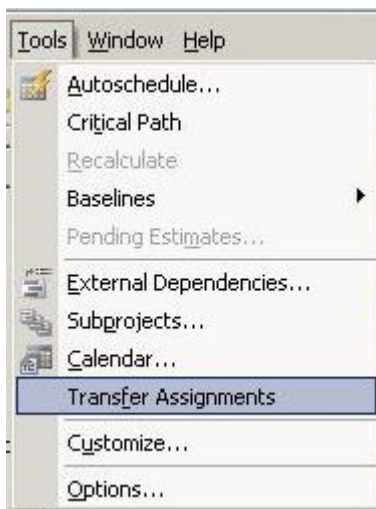


Fig OWB Transfer Assignments in Tools menu.

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

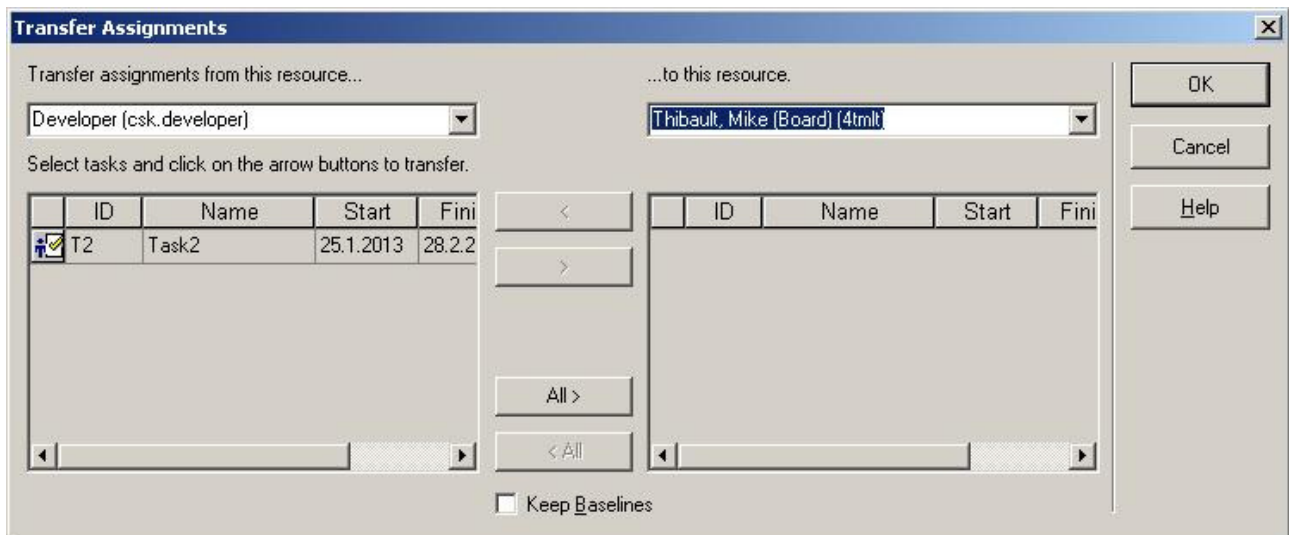


Fig Select resources/roles for transfer or assignments.

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.

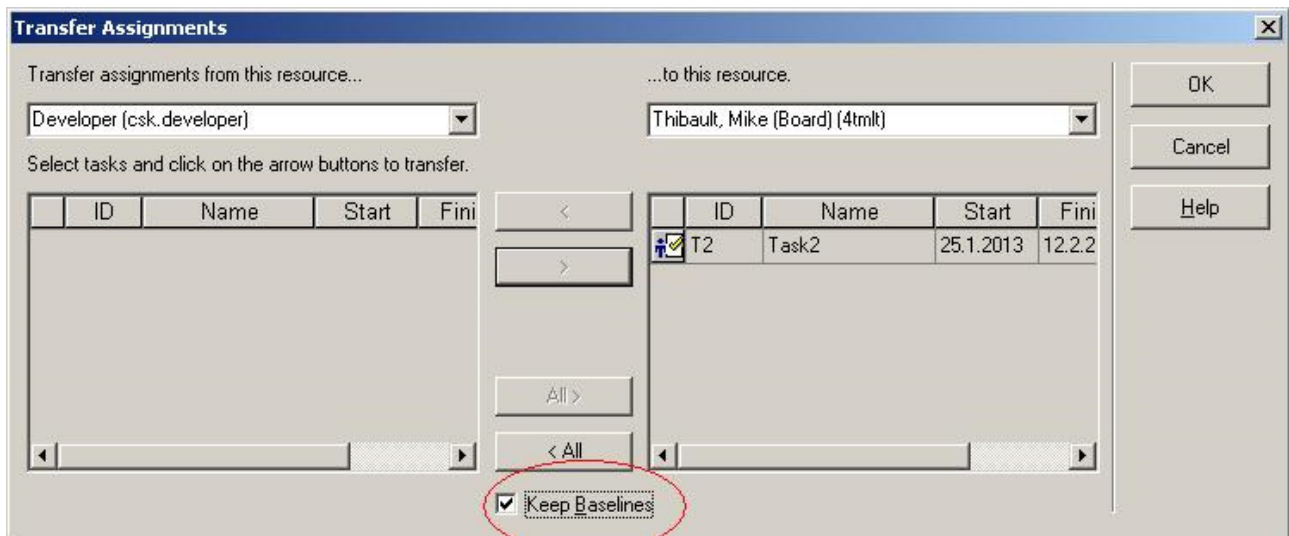


Fig Select the assignments to be transferred and how the baseline data is to be handled.

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	Baseline Usa	Baseline Usa	Baseline Usa	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		Thibault, Mike				100,00			
					100,00		100,00		
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						
4tmilt	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							
<input checked="" type="checkbox"/> Assign <input checked="" type="checkbox"/> Replace <input checked="" type="checkbox"/> 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

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