

Replacing one role with another, in bulk, on tasks - The below mentioned method is particularly useful when, let's say you want to make the changes to the project template which has a large WBS structure, and a lot of role assignments to tasks.

Access the project's Task > Assignments page

Project: NJ - Test Project - 062315 - Tasks - Assignments Scenario: [--Select--]

Filter

Parent Task:

Resource Type: All

Include All Sub-Tasks:

Exclude Completed Tasks:

From Date:

To Date:

Assigned to:

Roles:

Filter Show All Clear

Name	Role	Start	Finish	Actuals	ETC
Select Evaluation Team		5/24/17	7/5/17	0.00	96.00
↳ Meyer, Terry				0.00	0.00
↳ Project Manager	Project Manager	5/24/17	7/5/17	0.00	96.00
Gather Customer Requirements		7/9/15	7/10/15	0.00	48.00
↳ Architect - England	Architect	7/9/15	7/10/15	0.00	16.00
↳ Business Analyst	Business Analyst	7/9/15	7/10/15	0.00	16.00
↳ Project Manager	Project Manager	7/9/15	7/10/15	0.00	16.00

Using the **Assigned To** filter option, select the role that needs to be replaced

Project: NJ - Test Project - 062315 - Tasks - Assignments Scenario: [--Select--]

Filter

Parent Task:

Resource Type: All

Include All Sub-Tasks:

Exclude Completed Tasks:

From Date:

To Date:

Assigned to:

Roles:

Filter Show All Clear

Project: NJ - Test Project - 062315 - Tasks - Assignments Scenario: [--Select--]

Filter

Parent Task:

Resource Type: All

Include All Sub-Tasks:

Exclude Completed Tasks:

From Date:

To Date:

Assigned to: Business Analyst

Roles:

Filter Show All Clear

Name	Role	Start	Finish	Actuals	ETC
Gather Customer Requirements		7/9/15	7/10/15	0.00	16.00
↳ Business Analyst	Business Analyst	7/9/15	7/10/15	0.00	16.00
Create RFP		7/16/15	7/17/15	0.00	16.00
↳ Business Analyst	Business Analyst	7/16/15	7/17/15	0.00	16.00
Review RFP Responses		7/20/15	7/21/15	0.00	16.00
↳ Business Analyst	Business Analyst	7/20/15	7/21/15	0.00	16.00
POC		7/27/15	7/28/15	0.00	16.00
↳ Business Analyst	Business Analyst	7/27/15	7/28/15	0.00	16.00
Review Pricing and Final Proposals		7/29/15	7/30/15	0.00	16.00
↳ Business Analyst	Business Analyst	7/29/15	7/30/15	0.00	16.00

Select the checkbox on the label section of the list view, and click on **Replace**

Project: NJ - Test Project - 062315 - Tasks - Assignments Scenario: [-Select-]

Parent Task Resource Type: All

Include All Sub-Tasks Resources and Roles: Business Analyst

Exclude Completed Tasks Assigned to: Business Analyst

From Date: To Date:

Roles:

<input checked="" type="checkbox"/>	Name	Role	Start	Finish	Actuals	ETC
<input checked="" type="checkbox"/>	Gather Customer Requirements	Business Analyst	7/9/15	7/10/15	0.00	16.00
<input checked="" type="checkbox"/>	↳ Business Analyst	Business Analyst	7/9/15	7/10/15	0.00	16.00
<input checked="" type="checkbox"/>	Create RFP	Business Analyst	7/16/15	7/17/15	0.00	16.00
<input checked="" type="checkbox"/>	↳ Business Analyst	Business Analyst	7/16/15	7/17/15	0.00	16.00
<input checked="" type="checkbox"/>	Review RFP Responses	Business Analyst	7/20/15	7/21/15	0.00	16.00
<input checked="" type="checkbox"/>	↳ Business Analyst	Business Analyst	7/20/15	7/21/15	0.00	16.00
<input checked="" type="checkbox"/>	POC	Business Analyst	7/27/15	7/28/15	0.00	16.00
<input checked="" type="checkbox"/>	↳ Business Analyst	Business Analyst	7/27/15	7/28/15	0.00	16.00
<input checked="" type="checkbox"/>	Review Pricing and Final Proposals	Business Analyst	7/29/15	7/30/15	0.00	16.00
<input checked="" type="checkbox"/>	↳ Business Analyst	Business Analyst	7/29/15	7/30/15	0.00	16.00

On the corresponding window, select the role that needs to replace the existing one, and click **Replace**

Business Analyst	7/9/15	7/10/15	16.00	Gather Customer Requirements
Business Analyst	7/27/15	7/28/15	16.00	POC
Business Analyst	7/29/15	7/30/15	16.00	Review Pricing and Final Proposals
Business Analyst	7/20/15	7/21/15	16.00	Review RFP Responses

Filter: System Default

Resource/Role Name: Resource Type: Labor

Resource/Role ID: Booking Status: All

Resource OBS: Zero Allocation: No

Resource OBS - Filter Mode: Unit only Power Filter: [Build Power Filter]

Project Role:

Resource/Role	Resource/Role ID	Project Role	Staff OBS Unit	Booking Status	Start	Finish	Average Allocation %	Allocation
<input type="radio"/> Architect - Austria	csk.architect	Architect		Soft	6/23/15	12/31/15	100.0%	1,104.00
<input checked="" type="radio"/> Architect - England	csk.architect	Architect		Soft	6/23/15	7/5/17	100.0%	4,256.00
<input type="radio"/> Business Analyst	csk.businessAnalyst	Business Analyst		Soft	6/23/15	12/31/15	100.0%	1,104.00
<input type="radio"/> Meyer, Terry	tlmeyer			Soft	6/23/15	12/31/15	100.0%	1,104.00
<input type="radio"/> Project Manager	csk.projectmanager	Project Manager		Soft	6/23/15	12/31/15	100.0%	1,104.00

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The existing role will be replaced by the new role on the tasks that were assigned to the old role

Project: NJ - Test Project - 062315 - Tasks - Assignments Scenario: [-Select-]

Include All Sub-Tasks Resources and Roles: Architect - England

Exclude Completed Tasks Assigned to: Architect - England

From Date: To Date:

Roles:

<input type="checkbox"/>	Name	Role	Start	Finish	Actuals	ETC
<input type="checkbox"/>	Gather Customer Requirements	Architect	7/9/15	7/10/15	0.00	32.00
<input type="checkbox"/>	↳ Architect - England	Architect	7/9/15	7/10/15	0.00	32.00
<input type="checkbox"/>	Create RFP	Business Analyst	7/16/15	7/17/15	0.00	16.00
<input type="checkbox"/>	↳ Architect - England	Business Analyst	7/16/15	7/17/15	0.00	16.00
<input type="checkbox"/>	Review RFP Responses	Business Analyst	7/20/15	7/21/15	0.00	16.00
<input type="checkbox"/>	↳ Architect - England	Business Analyst	7/20/15	7/21/15	0.00	16.00
<input type="checkbox"/>	POC	Business Analyst	7/27/15	7/28/15	0.00	16.00
<input type="checkbox"/>	↳ Architect - England	Business Analyst	7/27/15	7/28/15	0.00	16.00
<input type="checkbox"/>	Review Pricing and Final Proposals	Business Analyst	7/29/15	7/30/15	0.00	16.00
<input type="checkbox"/>	↳ Architect - England	Business Analyst	7/29/15	7/30/15	0.00	16.00

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