

# Lehnert Computer Services

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## Ask the Teacher – September, 2005

By Ellen Lehnert, PMP

Lehnert Computer Services

This question is from a consulting session I was involved in last week:

**Question:** Scheduling is my big problem. I want to book out an individual to run 2-2.5 hour meetings per week per department for 12 weeks. This individual could be running meetings for up to 5 departments. In addition, there will be a 1.5 hour write up time for each meeting. How would I put this into my schedule and get the costs also?

**Answer:** Since the meetings are going to be held on specific days, I would handle this situation with recurring tasks. I would also:

1. Make sure that the resources that would be used for these meetings would have Standard Costs applied on the resource sheet.
2. Combine the meeting and the write up into one task of 4 hours (this allows for less input during tracking). The total time can be altered if necessary.

### Create a recurring meeting:

**NOTE:** In the following example, the standard cost for the resource is \$100.00 per hour

Click in a blank task or on a task that you would like to have the recurring meeting inserted above

Insert → Recurring Tasks

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**Recurring Task Information**

Task Name:  Duration:

Recurrence pattern

Daily  week on:

Weekly

Monthly  Sunday  Monday  Tuesday  Wednesday

Yearly  Thursday  Friday  Saturday

Range of recurrence

Start:  End after:  occurrences

End by:

Calendar for scheduling this task

Calendar:   Scheduling ignores resource calendars

Enter these values and click OK

The result is a task entry that looks like this:

|   |   |                              |           | S  | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F |
|---|---|------------------------------|-----------|----|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 |   | Plan the Move                | 1 day?    | 9/ |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
| 2 | ↻ | <b>HR Department Meeting</b> | 17.5 days | 9/ |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |

Click on the plus sign next to the title and you will see the following result:

|    |   |                              |           |     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|----|---|------------------------------|-----------|-----|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| 1  |   | Plan the Move                | 1 day?    | 9/  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 2  | ↻ | <b>HR Department Meeting</b> | 17.5 days | 9/  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 3  | 📅 | HR Department Meeting 1      | 4 hrs     | 9/  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 4  | 📅 | HR Department Meeting 2      | 4 hrs     | 9/  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 5  | 📅 | HR Department Meeting 3      | 4 hrs     | 9/1 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 6  | 📅 | HR Department Meeting 4      | 4 hrs     | 9/1 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 7  | 📅 | HR Department Meeting 5      | 4 hrs     | 9/2 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 8  | 📅 | HR Department Meeting 6      | 4 hrs     | 9/2 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 9  | 📅 | HR Department Meeting 7      | 4 hrs     | 9/2 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 10 | 📅 | HR Department Meeting 8      | 4 hrs     | 9/2 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

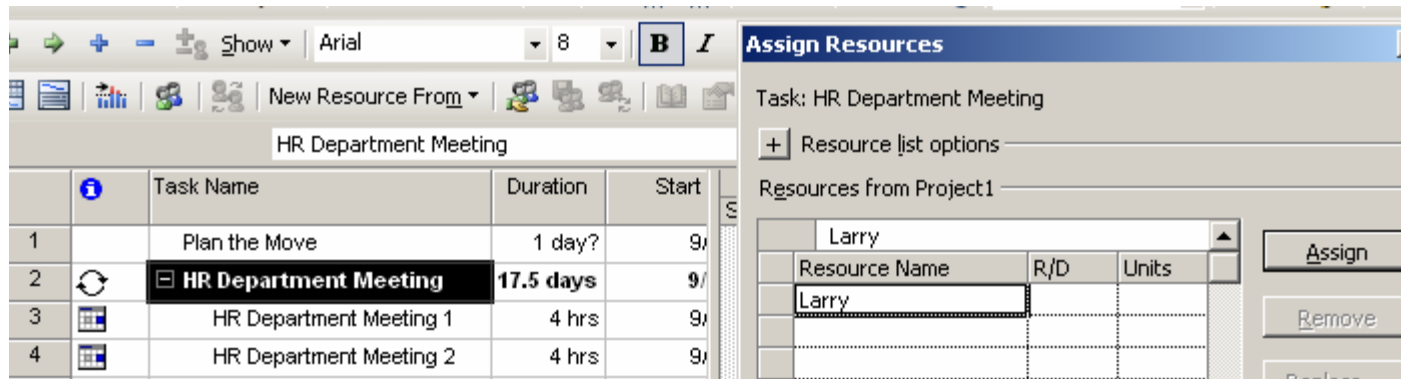
Now you are ready to assign the resource to this task:

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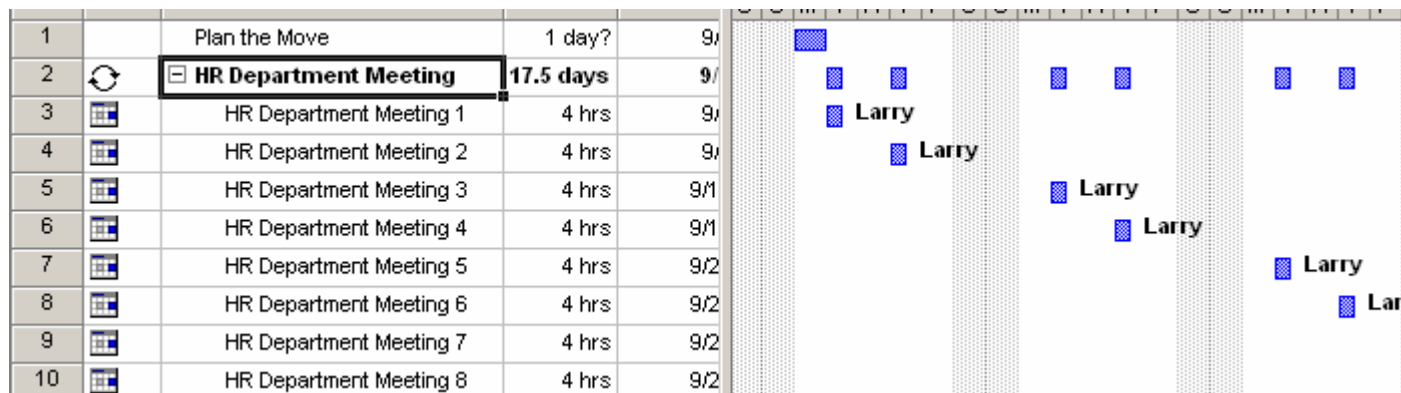
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Click on the summary task for this item and assign the resource to the summary task.  
This action will assign the resource to all the tasks under the summary and not the summary itself. This type of assignment will only work for recurring tasks.



The result is as follows:



To show the cost associated with these meetings:

View → Tables: → Cost

Note in the view below that you can see the total cost of all of the meetings as well as the cost of each individual meeting.

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|    |   |               |                 |                   |               |                   |
|----|---|---------------|-----------------|-------------------|---------------|-------------------|
| 1  | Plan the Move   | \$0.00        | Prorated        | \$0.00            | \$0.00        | \$0.00            |
| 2  | <input type="checkbox"/> <b>HR Department Meeting</b> | <b>\$0.00</b> | <b>Prorated</b> | <b>\$3,200.00</b> | <b>\$0.00</b> | <b>\$3,200.00</b> |
| 3  | HR Department Meeting 1                               | \$0.00        | Prorated        | \$400.00          | \$0.00        | \$400.00          |
| 4  | HR Department Meeting 2                               | \$0.00        | Prorated        | \$400.00          | \$0.00        | \$400.00          |
| 5  | HR Department Meeting 3                               | \$0.00        | Prorated        | \$400.00          | \$0.00        | \$400.00          |
| 6  | HR Department Meeting 4                               | \$0.00        | Prorated        | \$400.00          | \$0.00        | \$400.00          |
| 7  | HR Department Meeting 5                               | \$0.00        | Prorated        | \$400.00          | \$0.00        | \$400.00          |
| 8  | HR Department Meeting 6                               | \$0.00        | Prorated        | \$400.00          | \$0.00        | \$400.00          |
| 9  | HR Department Meeting 7                               | \$0.00        | Prorated        | \$400.00          | \$0.00        | \$400.00          |
| 10 | HR Department Meeting 8                               | \$0.00        | Prorated        | \$400.00          | \$0.00        | \$400.00          |

The numbers associated with each meeting will also give you a nice way of tracking the meetings that are being held. During tracking, each task can be marked completed to track accurate actual costs and work. Checking the Resource Usage view will show all of the assignments a resource has in a time frame. These tasks usually are not tied with relationships.

## BE CAREFUL:

- Too many recurring tasks can be hard to manage – only enter what you really need
- Deleting the summary task will delete all recurring tasks beneath it
- When a recurring task is assigned, the assignment will always go to the starting time of the day. If you have 2 tasks in a day, (a recurring and a regular task) the resource will appear overbooked when, in reality, they are not. The system has just booked the same hour of the day twice. This is why you will, at times, you will see a resource that is booked to 3 hours in a day, yet they are considered overbooked.
- These tasks have constraints applied to each task and will usually not be leveled.