

Lehnert Computer Services

1482 Gone Away Ct.
Wheaton, IL 60187
(630)260-4770
E-Mail: ellen@lehnertcs.com

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Ellen Lehnert, PMP - Lehnert Computer Services
www.lehnertcs.com

Topic: Replacing a resource in a project schedule

Question: I have a project that is in progress and a key resource has left the company. How do I replace this resource in my project schedule?

Answer: That is a great question and a very common situation. Please see below for the steps to handle this situation.

The first step – get the new resource on the resource sheet. If you are using Project Server, you will probably go to Build Team and select another resource. If you are Project Standard or if you are using Sever and wish to create a local resource, go to View → Resource Sheet and enter a new resource. You might also select a generic resource to be a temporary holding name if you have not identified the new resource yet.

Both situations below are using the Task Entry view. This view is a split screen showing the Gantt chart in the top pane and the Resource Work view of the Task Form in the bottom pane. (With the Gantt chart showing – Windows → Split screen, right click in the bottom pane, select Resource Work)

Situation 1: Tasks that have not started – there **are not** actuals or tracking on the task.

This is the easiest situation to handle. Using the above view:

1. Click in the bottom pane on the resource name you wish to replace
2. Select a new resource or generic resource in the resource name column*
3. Click the OK button
4. Project Server – when all changes are completed, publish New and Changed Assignments

***Note:** If you would like to create a new resource, it is better to do it at the resource sheet. If you type the name here, the resource is created but only default values are entered. If you would like to restrict this practice go to: Tools → Options → General. At the bottom of the form there is an option that reads “Automatically add new resources and tasks”. If you turn this off, when a new resource is added a warning will pop up and you must click “Yes” to continue.

Situation 2: Tasks have been started – there **are** actuals on the task.

Your goal is to zero out the remaining work on the resource that is no longer on the project and assign that work to another resource. If you perform a full replace of the resource on the project, you will lose any history, work and cost that which attributed to the departing resource. Project Server is maintaining history on the assignment for the resource will not allow this to occur. Project Standard will ask you if you want to proceed and then the actual work would be attributed to the new resource. The steps below will need to be completed work for the task.

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Using the above view:

1. Click in the bottom pane
2. Click on the remaining work column for the resource name you wish to replace
3. Note the remaining work value
4. Zero out the remaining work for the resource you wish to replace
5. Select a new resource or generic resource in the resource name column
6. Increase the new resource's work assignment to be the value of the remaining work you just zeroed out
7. Click the OK button
8. Project Server – when all changes are completed, publish New and Changed Assignments

NOTE: The task form view and the assign resources box are showing resources in the order that they appear on the Resource Sheet. You might consider sorting them in alphabetical order so resources are easier to find during the assignment process.