

Lehnert Computer Services


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

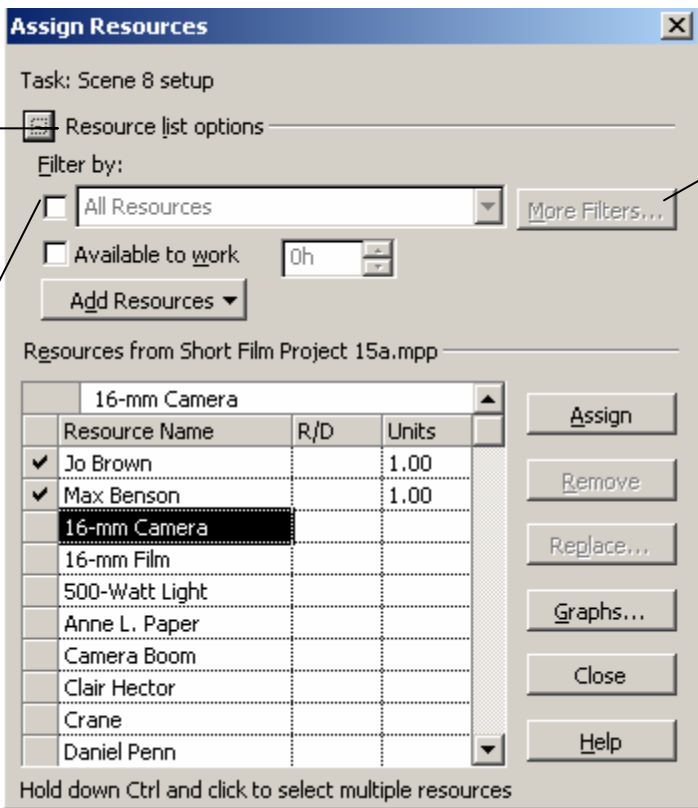
Article for MPA ezine – January, 2007
Ellen Lehnert, PMP - Lehnert Computer Services
www.lehnertcs.com

RE: Using filters during resource assignments

Question: Is it possible to filter resources by group so I don't have to go through the entire resource pool to find the resources I am looking for??

Answer: It depends on the method you use to assign resources.

- If you assign resources using the task entry view (Gantt chart on top, task form on the bottom) there is not a filter available.
- If you assign resources using the "Assign Resources" box , there is a filter available. You can use resource standard filters or create one of your own based on a custom resource field. Please see below:



The screenshot shows the 'Assign Resources' dialog box for the task 'Scene 8 setup'. It features a 'Filter by:' section with a dropdown menu set to 'All Resources' and a 'More Filters...' button. Below this is a checkbox for 'Available to work' and an 'Add Resources' button. The main area displays a list of resources from 'Short Film Project 15a.mpp', including '16-mm Camera', 'Jo Brown', 'Max Benson', '16-mm Film', '500-Watt Light', 'Anne L. Paper', 'Camera Boom', 'Clair Hector', 'Crane', and 'Daniel Penn'. A table with columns for 'Resource Name', 'R/D', and 'Units' is shown, with 'Jo Brown' and 'Max Benson' checked. Callouts point to the 'More Filters...' button, the 'Add Resources' button, and the 'More Filters...' button again.

Press to reveal filter options

Click to activate filter options

Reveals list of standard and custom filters.

Resource Name	R/D	Units
✓ Jo Brown		1.00
✓ Max Benson		1.00
16-mm Camera		
16-mm Film		
500-Watt Light		
Anne L. Paper		
Camera Boom		
Clair Hector		
Crane		
Daniel Penn		

Lehnert Computer Services

1482 Gone Away Ct.
Wheaton, IL 60187
(630)260-4770

E-Mail: ellen@lehnertcs.com

Grouping your resources by area or skill is a very common practice. On the resource sheet, the "Group" field could be used for this type of resource grouping. (see below) If you need multiple groupings, custom fields could be created to accommodate as many levels as you need. A custom filter would also be required to access the custom fields. Any custom filters would appear in the list of resource filters. Using these filters is an easy way to show just the resources you might be interested in per task.

For example: If I was interested in just my resources who are members of the "crew", on the resource sheet I would use the "Group" field to assign the resources to a specific work group. Then I could request the group "crew" using the filter feature – see below:

