

Lehnert Computer Services

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Topic: Assigning resources to summary tasks

Question: I want to assign resources to summary tasks because it seems an easy way to assign resources to several tasks at once. Is this a good idea??

Answer: I'm sorry to say that this is not a practice that I recommend. On the surface it might seem like a quick short cut but the impact of performing this action is deeper than you might think. Here is a few of the hidden reasons why I would not recommend this practice:

- Summary tasks are not real tasks – they are subtotals. If you have ever tried to change the dates, duration, work, or cost on a summary task, you know that these values are not entered but calculated. Assigning a resource to a summary task is assigning the resource to the subtotal which will change based on the detail that is within (below) that summary task.
- You are restricting levels in the WBS which might have an impact on your reporting abilities. If you have someone assigned to the WBS level 3 summary task and you have any WBS level 4's below it, the level 3 is including totals from the level 4's. Assigning the resource to a level 3 will also assign the resource too the level 4's below it. In theory, you could assign a resource to the project summary task and they will then be assigned to every task in the project.
- Tracking is a concern. This value will only be right twice during the performance of the project; when you are zero percent complete and 100% percent complete. If the detail tasks are tracked individually, the summary task is acting as a subtotal of the values below.
- All summary tasks are task type fixed duration and this cannot be changed. As a result, when the work of a task increases the duration will not increase. Also, as the work increases the cost doesn't increase. See examples below:

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Task Name	Cost	Duration	Work	Resource Names
8 Preliminary Investigation Stage	\$8,800.00	11 days	88 hrs	Accounting
9 Assign resources to preliminary inves	\$0.00	1 day	0 hrs	
10 Develop preliminary investigation plan	\$0.00	5 days	0 hrs	
11 Evaluate the market	\$0.00	10 days	0 hrs	
12 Analyze the competition	\$0.00	5 days	0 hrs	
13 Technical Feasibility Analysis	\$0.00	47 days	928 hrs	

Name: Preliminary Investigation Stage	Duration: 11d	<input type="checkbox"/> Effort driven	Previous
Start: 4/13/2007	Finish: 4/27/2007	Task type: Fixed Duration	% Complete: 0

ID	Resource Name	Units	Work	Ovt. Work	Baseline Work	Act. Work	Rem. Work
9	Accounting	1	88h	0h	0h	0h	88h

In this example, the resource "Accounting" has a rate of \$100 per hour and is assigned to the summary task but not the detail tasks. In the example below, the work column has been increased for task 10 (a fixed unit task) to 100 hours with no impact to the cost or the duration. See below:

Task Name	Cost	Duration	Work	Resource Names
8 Preliminary Investigation Stage	\$8,800.00	11 days	188 hrs	Accounting
9 Assign resources to preliminary inves	\$0.00	1 day	0 hrs	
10 Develop preliminary investigation plan	\$0.00	5 days	100 hrs	
11 Evaluate the market	\$0.00	10 days	0 hrs	
12 Analyze the competition	\$0.00	5 days	0 hrs	
13 Technical Feasibility Analysis	\$0.00	47 days	928 hrs	

Name: Preliminary Investigation Stage	Duration: 11d	<input type="checkbox"/> Effort driven	Previous
Start: 4/13/2007	Finish: 4/27/2007	Task type: Fixed Duration	% Complete: 0

ID	Resource Name	Units	Work	Ovt. Work	Baseline Work	Act. Work	Rem. Work
9	Accounting	1	88h	0h	0h	0h	88h

A check of the resource allocation using the Resource Usage view shows the resource assigned 88 total hours on the summary task. Resource allocations per task are not available and resource leveling will not be an option.

Assigning a resource to a summary task greatly inhibits the information your project schedule could provide to the project manager. Assigning a resource to the summary task might be "easier" but managing the project schedule will be less productive, confusing and more difficult.