

# Deltek Vision® 6.1 Resource Management

## Generic Resource Assignments Quick Reference Card

[www.deltek.com](http://www.deltek.com)

Generic Resource Assignments allow you to search for an established "generic" category of employee that has scheduled, planned hours, and replace the generic resource with a named employee.

Generic resources only display if the **Generic Method** on the Rates tab of Project Planning is set to Labor Category.

Select the dates for your resource search. These display on the accordion calendar within the grid results.

Use the filter options to specify detailed criteria for your resource search.

**Generic Resource:** Search all or specific resources.

**Organization:** Search all or specific organizations.

**Plan:** Specify the criteria for the types of plans, as well as their status and probability (0 to 999), that you wish to search.

**Advanced Search:** Enter additional criteria on the Plan Lookup to limit the data retrieved by the search.

Use the Generic Resource Assignments tabs as follows:

**Search:** Refreshes the screen with updated data.

**Options:** Select the display options for your **Generic Resource Assignments** grid.

**Legend:** Refer to the key on this tab for the color codes that display on your grid

You can assign a resource at the lowest level of the plan.

These are the plan's Start and Finish dates for the generic resource row.

You can also designate future hours as hard or soft booked, which allows a resource's future work to be prioritized or designated as "committed" to a project.

Plan Levels	Resource	Assignment Start	Assignment End	Planned Hours
<none>; copy 2				
20042.00: CEL RP Dog House Generic - Pre 2106				
0020042.00: CEL RP Dog House Generic				
0: Land Survey/Clearing				
AA: Tree Removal				
0000: Labor Code - 0000	Sr. Architect	8/12/2005	1/14/2006	222.
0001: Labor Code - 0001	Sr. Architect	8/12/2005	1/14/2006	108.
1010: Labor Code - 1010	Sr. Architect			
2023: Labor Code - 2023	Sr. Architect			
4022: Labor Code - 4022	Sr. Architect	8/12/2005	1/14/2006	
BB: Second Task				
2023: Labor Code - 2023	Sr. Architect	1/26/2006	4/6/2006	
1: Structural Design				
3053: Labor Code - 3053	Sr. Architect	2/10/2003	8/5/2005	

Select this arrow to access the drop-down menu and assign a named resource, or key in an employee name. If you use the drop-down, the following options display:

**Lookup...** Select this option to access the Employee Lookup and assign a resource.

**Resource Search...** Select this option to access the Resource Search dialog box. Use this dialog box to enter additional search criteria. When finished, the search results display in the **Resources that Match Search Criteria** field. To assign a named resource, select an employee from the **Resources that Match Search Criteria** grid and click **Reassign**. Vision displays the **Generic Resource Assignments** grid with the named resource assigned to the task.

Plan Name	Plan Number
Abington Elementary School	042002
Adephi	200300500-1
Belmont Park Grand Stand	200001102 - The Plan
Belmont Park Revision	200001101
Boston Public Gardens	890200510
Cape Cod Vacation Club	CCVC008
City of Half Facade Replacement	1999005.00
Copy of City Half Facade Replacement	
Fenway Park Wall Seating	2000219.00
Fox Run Expansion	2000250.00
Greater Baltimore Industrial Park	2000012.00
Hilton Head Clinic Expansion	HHC0001
I- 66 Expansion	1660001



# Deltek Vision® 6.0 Resource Management Resource Utilization Quick Reference Card

[www.deltek.com](http://www.deltek.com)

Resource Utilization allows you to search planned hours to determine how resources are utilized. The variance between planned and target hours is determined to be under, over, or properly utilized, based on the thresholds your System Administrator defines in Resource Management Configuration. This information is useful for determining if you need to adjust assignments due to slippage, scope changes, or deadline modifications. It is also beneficial as a reference for future project planning.

Select the dates and view for your resource search.

Use the various filter options to specify detailed criteria for your resource search.

**Organization:** Search all or specific organizations.

**Labor Category:** Search all or specific categories.

**Employee:** Search all, those with planned hours in specific periods, or particular employees.

**Advanced Search:** Enter additional criteria on the Employee Lookup to limit the data retrieved by the search.

Click **Search** to activate the search and populate the **Results** grid.

Use the Resource Utilization tabs as follows:

**Search:** Refreshes the screen with updated data.

**Options:** Select the display options and specify the level of detail for your **Resource Utilization** grid.

**Legend:** Refer to the key on this tab for the color codes that display on your grid and indicate the type of project, plan, utilization, booking, and footnotes.

Total Available Hours	Resource Name	Jan 2004 1/1 - 1/31 Thu-Sat	Feb 2004 2/1 - 2/29 Sun-Sun	Mar 2004 3/1 - 3/31 Mon-Wed	Apr 2004 4/1 - 4/30 Thu-Fri	May 5/1 - Sat-S
2016.00	Johnson, Abe	1744.38 (991...)	1734.30 (108...)	2062.04 (117...)	1999.62 (119...)	1809.11
1260.00	Harding, Neil	921.14 (837%)	1010.70 (101...)	1155.20 (105...)	1134.00 (108...)	1066.00
2016.00	Arkansas, Willie	945.56 (537%)	1020.20 (638...)	1261.46 (717...)	1235.43 (735...)	1117.7
1814.40	Apple, William	314.22 (198...)	566.30 (393...)	854.79 (540...)		
5.00	Spackler, Carl	40.92	37.20	40.92		
2.00	Puddy, David	225.06	204.60	225.06		
4.00	Barlette, JamesZ	101.64 (58%)	92.40 (58%)	128.11 (73%)		
6.00	Cohen, Grace					
1512.00	Perrelli, Isabella	20.02 (11%)*	18.20 (11%)*	20.02 (11%)*		
2016.00	Idaho, Emily	291.06 (165...)	4.20 (3%)*	4.62 (3%)*		
2016.00	Von Nostrand, Martin					
2016.00	Harding, Sarah					

Roll your mouse over the info icons to view screen tips.

Select the arrow in the **Resource Name** column to access the drop-down menu and copy or move hours, or view additional availability or utilization information about the resource. You can also expand and collapse all tasks associated with the resource.

In addition, the **Resource Search...** option brings up a dialog that allows you to search for and replace a generic resource placeholder or employee with an actual named resource within your plan.

Depending on your Configuration settings, these columns display a combination of total, planned, booked, and billable hours, as well as schedule information.

Color codes identify the resources needing attention, and you can take the necessary actions from this screen. Periods within an assignment, or all of an employee's assignments can be reassigned to another resource.

You can also designate future hours as hard or soft booked, which allows a resource's future work to be prioritized or designated as "committed" to a project. The Resource Utilization report has options for output based on soft / hard booked designations.

