

Deltek Vision® 7.x Resource Management

Generic Resource Assignments Quick Reference Card

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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.

Plans: 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.

Show: 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 and indicate the type of project, plan, and booking.

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.

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

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.

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Deltek Vision® 7.x Resource Management Resource Utilization Quick Reference Card

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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.

Organizations: Search all or specific organizations.

Labor Categories: Search all or specific categories.

Employees and Generic Resources: Search all, those with planned hours in specific periods, or particular employees/resources.

Plan Level Rows to Show: Use these filters to determine which plans display in the plan level rows on the Resource Utilization grid.

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.

Show: 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.

Resource Utilization (read-only)

Hide Panel Navigator Plan Status ? Help

Select Resources Search

Assignments
Dates: 10/2/2007 - 4/26/2011
View By: Week

Search Show Legend

Organizations
[Wildcard] / [Wildcard] / [Wildcard]
Apply To: Plan
Labor Categories: All Labor Categories

Employees
Those With Planned Hours in Period
Select: <based on selected records>

Generic Resources
Selected Generic Resources
Select: Architect

Plan Level Rows to Show:
Mapping: Mapped Only
☒ Included in Utilization and Reporting
Plan Probability Percent is: >=

Resource Name	Scheduled Ratio	Total Available Hours	Total Planned Hours	Feb 2009 2/1 - 2/28 Sun-Sat	Mar 2009 3/1 - 3/31 Sun-Tue
Admin2, Admin2	0%			0.00	0.00
Anderson, Steve	4%	6256.00	222.00*	6.80 (4%)*	7.88 (4%)*
Barretts, Tina	0%	6256.00		0.00 (0%)*	0.00 (0%)*
Baugh, Laura	0%	6256.00		0.00 (0%)*	0.00 (0%)*
Cohen, Grace	10%	1564.00	153.55*	1.00 (3%)*	0.45 (1%)*
Employee27, Paul	0%				
Employee28, Paul	0%				
Gonzalez, Luis	3%	6256.00	200.10*		
Hertz, Johnathan	1%	6256.00	88.14*		
Hightower, John	0%	6256.00	16.00*		
JonesSFAR, John	0%				
JPARK, JPARK					
LI, LI					
Lambert, Robert					
Malone, Samuel					
Nugent, Joseph					
RYAN, RYAN					
Tortelli, Carla					
Turner, Charles					

Employee Search...
Copy Hours
Move Hours
Soft Book
Hard Book
Availability
All In-Utilization Commitments
Expand All
Collapse All

Results in this column are just for the selected date range.

* Due to the query used in the search, values shown at the resource level are not supported by the plan levels.

Soft booked hours are currently included in the resource name's total planned hours, billable planned hours, and utilization calculations.

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. And use the **Employee Search...** option to search for and replace named resources within your plan.

Depending on your Configuration settings, these columns display a combination of ratios, 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, the entire 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 by Organization report has options for output based on soft / hard booked