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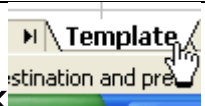


Resource Assignments Workbook

SSI Status Workbook Template Setup

- Download this tool at: [https://ssitools.com/SSIToolbox/SSI_Resource_Tools\(V2021-10-15\).xism](https://ssitools.com/SSIToolbox/SSI_Resource_Tools(V2021-10-15).xism)
- The workbook must contain a sheet named Template. SSI Tools uses copies of the template's layout and format to make resource worksheets for task selections or task owners (depending on user options described later in this document)
- The sheet named "Template" ***Must*** contain the sections shown below in BLUE.
- You are free to Add or Delete the columns shown in YELLOW to suit the needs of your project.

Select the Template tab on the bottom of the workbook



	A	B	C	D	E	F	G
1	Press Control Shift S to Run this SSI tool						MSP Res ID>>
2							Type
3							Rate>> and Cost (below)
4							\$0
5	Unique ID	Name	Duration	Start	Finish	Summary	Res Name>>



Generate Worksheets (Quick Method)

- Open a project file, and select tasks
- Open the SSI Resource Assignment Workbook using Ctrl + Shift + R
- Copy the sheet named "Template" (optional but recommended)
- Press Control Shift S to Run the SSI tool
- Select report options and Click "Get Tasks"

Get Microsoft Project Tasks and Resource Assignments Options:

Move the mouse over any of the options (check boxes) for a detailed description of each option.

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Generate Worksheets | Save Worksheets | Post to Microsoft Project | Maintenance

Select a Project >> C:\Users\Public\SSI_Tools\ExampleProject.mpp

(Optional) Get Unique Task Owners and Make a Sheet for Each

Get Task Owner Names in Project

Make Sheets for Selected Names >>

Select names from the list shown to the left. Then click Make Sheets for Selected Names to setup a resource worksheet for each name selected.

Task Owner Data Field in Project

Get Microsoft Project Tasks and Resource Assignments

Get Tasks & Resources

☒ Get Summaries ☒ Get Unassigned Tasks ☐ Get Unused Resources

☒ Get Selected Tasks ☐ Get All Tasks ☐ Get by Task Owner

☐ Get Baseline Wrk/Cost ☒ Get Rem Wrk/Cost ☐ Get All Work/Cost

Get Resources if Group =

☐ Get Act Work/Cost ☐ Get Resource Units

Progress:

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Generate Worksheets (By Task Owner Method)

1. Open a project file, and select tasks
2. Open the SSI Resource Assignment Workbook
3. Press Control + Shift + R to Run the SSI tool
4. Generate a list of unique task owners in the current project by selecting a project field where tasks owners are identified
5. Make a new worksheet for each selected task owner
6. Select report options and Click "***Get Tasks & Resources***"

Move the mouse over any of the options (check boxes) for a detailed description of each option.

Save Separate Worksheet(s) Option

1. Click ***Save project to >>*** to browse for a folder to save your excel files
2. Click ***Save Sheets as >>*** to save each sheet in the workbook to the folder you selected in the step above.



Structured Solutions Resource Assignments

Generate Worksheets | Save Worksheets | Post to Microsoft Project | Maintenance

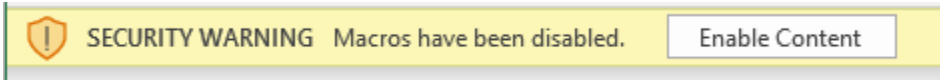
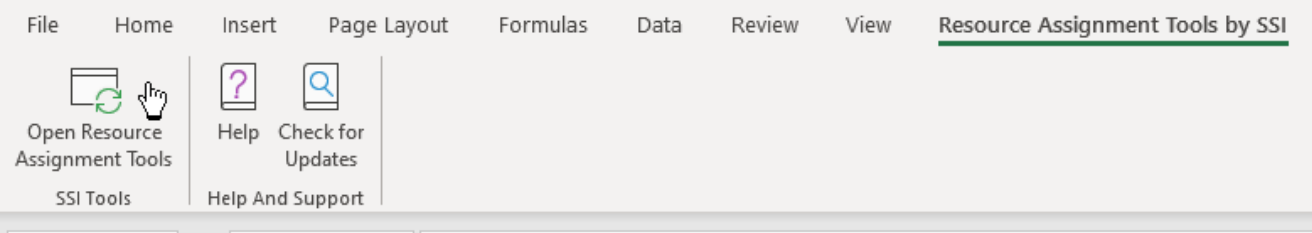
Save Sheets to >> C:\SSI-Tools\AssignmentSheets

Save Sheets as >> The Sheet Name: Plus "_" & The Project Title:

Sheet Name ProjectABC



Class Exercise – Make a Resource Assignment Worksheet for Control Account Managers

Step	Description / Image View
1.	Open the <i>SSI Resource Assignment Excel Workbook</i> named <i>SSI_ResourceTools</i> If needed, download the Workbook tool at: Resource Assignment Workbook
2.	Press Enable Content if the Security Warning appears in Excel 
3.	Open the <i>Example Project for Resource</i> tools named <i>ExampleProject.mpp</i> If needed, download the Example Project at: Example Project for Exercises
4.	Select Open Resource Assignment Tools from the SSI Tools group of the Resource Assignment Tools by SSI menu 
5.	Select Text2 below <i>Task Owner Data Field in Project</i>
6.	Click Get Task Owner Names in Project
7.	Click <i>Make Sheets for Selected Names</i>



Structured Solutions Resource Assignment Tools

Generate Worksheets | Save Worksheets | Post to Microsoft Project | Maintenance

Select a Project >> C:\Users\Public\SSI_Tools\ExampleProject.mpp

(Optional) Get Unique Task Owners and Make a Sheet for Each

Get Task Owner Names in Project

Make Sheets for Selected Names >>

Deployment
Design
Dev
PMO
Sys Eng

Select names from the list shown to the left. Then click Make Sheets for Selected Names to setup a resource worksheet for each name selected.

Task Owner Data Field in Project

Text2

Exercise Continues on Next Page



8. Select the options shown below and *Click Get Tasks & Resources*

Get Microsoft Project Tasks and Resource Assignments

☒ Get Summaries ☒ Get Unassigned Tasks ☒ Get Unused Resources

☐ Get Selected Tasks ☐ Get All Tasks ☒ Get by Task Owner

☒ Get Baseline Wrk/Cost ☐ Get Rem Wrk/Cost ☐ Get All Work/Cost

Get Resources if Group ☐ Get All Work/Cost

☐ Get Resource Units

9. Inspect each worksheet created by SSI Tools – the 1st of 5 sheets is shown below

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1							MSP Res ID>>	1	2	3	4	5	6	7	8	9	10
2							Type	Hr	Hr	Hr	Hr	Hr	Hr	Hr	Hr	Hr	\$
3							Rate>> and Cost (below)	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00	\$1
4							Res >> Sum Below	\$71,700									
5	Unique ID	Name	Start	Finish	Duration	Summary	Res >> Sum Below	SW Engineer	HW Engineer	Systems Engineer	Program Manager	PM Office	Security Engineer	Productio n Lead	Productio n Support	Test Engineer	Test Tech
6	96	Implementation	9/13/21	11/10/21	43 days	Yes											
7	97	Implement of Target Product Solution	9/13/21	10/15/21	25 days	Yes											
8	98	Conduct Pilot	9/13/21	9/24/21	10 days	No	200							80	40	40	40
9	99	Complete Preparation of Operational Sites	9/13/21	9/17/21	5 days	No	80							40	40		
10	100	Deploy Solution to Production Environment	9/27/21	10/15/21	15 days	No	480							120	120	120	120
11	101	Conduct Operational Readiness Review (ORR)	10/18/21	11/10/21	18 days	Yes											
12	102	Generate Presentation Materials for ORR	10/18/21	10/22/21	5 days	No	100						40	40	20		
13	103	Ensure ORR Exit Criteria Has Been Met	10/25/21	10/25/21	1 day	No	8							8			
14	104	Conduct Operational Readiness Review (ORR)	10/26/21	10/27/21	2 days	No	48	8	8	8	8	8	8				
15	105	Close ORR Action Items	10/28/21	11/10/21	10 days	No	40							40			
16	106	Obtain ATO Approval Letter	11/10/21	11/10/21	0 days	No	0										
17	End																

End of Exercise



Completing & Reviewing a Worksheet

Complete sheets as follows:

- Worksheet users add numeric values at the intersection of the task row and the resource column.
- The user can add assignments to tasks with no existing assignments.
- The user can edit assignments to tasks with existing assignments.
- Note – This tool will not accept resource values added to Summary tasks.

Review completed sheets as follows:

- Column 1 must be populated with the task Unique ID or ID. Make sure there are no blank or invalid entries.
- Row 1 have must contain valid Resource ID's.
- Assignment values must be numeric (no text).

	A	B	C	D	E	F	G	H
1	Press Control Shift S to Run this SSI tool						MSP Res ID>>	110
2							Type	Hrs
3							Rate>> and Cost (below)	\$77.42
4							\$122,958	\$122,958
5	Unique ID	Name	Duration	Start	Finish	Summary	Res Name>>	Program Mgr
6	783	Office of the PMO	255 days	6/6/11	6/5/12	Yes		
7	4284	Program Manager (Award through Sep)	83 days	6/6/11	9/30/11	No		320
8	784	Program Manager (Key)	172 days	10/3/11	6/5/12	No		1268

Class Exercise – Change Existing Assignment Values for Deployment Team

Step		Description / Image View															
1. Add the following Assignments to the task named Conduct Pilot																	
	Unique ID	Name	Start	Finish	Duration	Summary	Res >> Sum Below	SW Engineer	HW Engineer	Systems Engineer	Program Manager	PM Office	Security Engineer	Production Lead	Production Support	Test Engineer	Test Tech
5																	
6	96	Implementation	9/13/21	11/10/21	43 days	Yes											
7	97	Implement of Target Product Solution	9/13/21	10/15/21	25 days	Yes											
8	98	Conduct Pilot	9/13/21	9/24/21	10 days	No	260	10	10	10	10	10	10	80	40	40	40
9	99	Complete Preparation of Operational Sites	9/13/21	9/17/21	5 days	No	80							40	40		
10	100	Deploy Solution to Production Environment	9/27/21	10/15/21	15 days	No	480							120	120	120	120
11	101	Conduct Operational Readiness Review (ORR)	10/18/21	11/10/21	18 days	Yes											
End of Exercise																	



Posting Resource Assignment Values to a Project

SSI Status Worksheet Posting

1. Open a Project
2. Remove all filters and select a task view such as the Gantt Chart.
3. Press Ctrl + Shift + R to start the SSI Tool
4. Select the Workbook and Worksheet to post from
5. Select the Project to Post to
6. Select the match method ID or Unique ID)
7. Select Options for posting changes in the project
 - Note – See the next page for details on posting options

Structured Solutions Resource Assignments

Generate Worksheets | Save Worksheets | **Post to Microsoft Project** | Maintenance

Post From Workbook: SSI_Resource_Tools(V2021-10-15).xslm

Post From Worksheet: Template

Post to Project: C:\Users\Public\SSI_Tools\ExampleProject.mpp

Note - the first column in your worksheet must match the ID or Unique in your Project:

The first column in the worksheet matches:

☐ ID ☒ Unique ID

Options that Delete All Existing Assignments and Replace with Values from Sheet

☒ Post as Work/Cost ☐ Post To Baseline ☐ Post As Resource Units

Options that Preserve Current Resource Assignments

☐ Post as Rem Work/Cost ☐ Post As Resource Units

☐ Do Not Change Task Type ☐ Allow Posting to Summary Items **Post to Project**

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Progress:



Posting Options

- Options that Delete All Existing Assignments and Replace with Values from Sheet

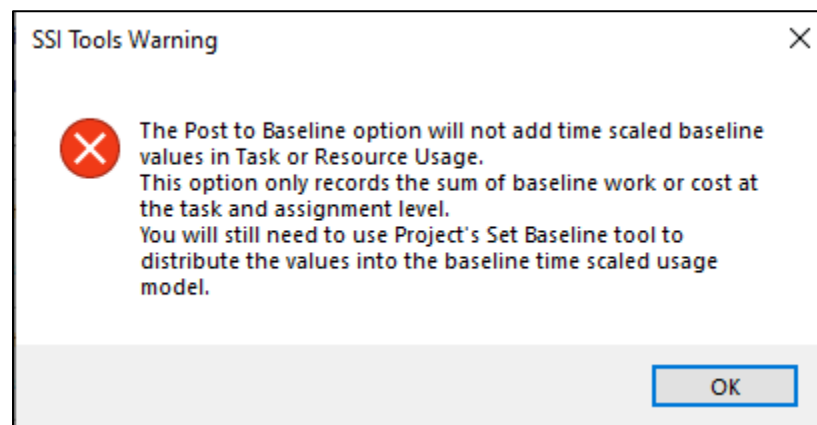
Options that Delete All Existing Assignments and Replace with Values from Sheet

☒ Post as Work/Cost ☐ Post To Baseline ☐ Post As Resource Units

Pick these options only if you want to completely replace prior assignments in a project with values in the sheet. Blank or zero resource values in the sheet will result in no resource assignment in project. Values greater than zero will result in a resource assignment in project.

Note: - Using this option on tasks that are in-progress or complete may have unintended consequences that will alter a tasks status or duration.

Note: - The Post to Baseline option will not add time scaled baseline values. When selecting or using this option, the following warning will remind you of this limitation. Not having baseline values in the Project's Time Scaled Usage model may effect Earned Value and other usage of Time Scaled Baseline data.



- Options that Preserve Current Assignments and Add/Delete or Change per the Values on the Sheet



Options that Preserve Current Resource Assignments

- ☐ Post as Rem Work/Cost ☐ Post As Resource Units

Pick these options if you want to preserve the existing assignments in project and make changes to assignment values according to those entered on the sheet.

- To Delete an assignment in project, you must set its value to Zero in the sheet.
- To Add an assignment, you must enter a value greater than zero in the sheet.

Class Exercise – Change Existing Assignment Values for Deployment Team

Step	Description / Image View
1.	Post the values entered in the prior exercise as Remaining Work/Cost

Unique ID	Name	Start	Finish	Duration	Summary	Res >> Sum Below	SW Engineer	HW Engineer	Systems Engineer	Program Manager	PM Office	Security Engineer	Production Lead	Production Support	Test Engineer	Test Tech
96	Implementation	9/13/21	11/10/21	43 days	Yes											
97	Implement of Target Product Solution	9/13/21	10/15/21	25 days	Yes											
98	Conduct Pilot	9/13/21	9/24/21	10 days	No	260	10	10	10	10	10	10	80	40	40	40
99	Complete Preparation of Operational Sites	9/13/21	9/17/21	5 days	No	80							40	40		
100	Deploy Solution to Production Environment	9/27/21	10/15/21	15 days	No	480							120	120	120	120
101	Conduct Operational Readiness Review (ORR)	10/18/21	11/10/21	18 days	Yes											

Generate Worksheets | Save Worksheets | Post to Microsoft Project | Maintenance

Post From Workbook: SSI_ResourceToolsV02-18-2021.xlsm

Post From Worksheet: Deployment

Post to Project: C:\Users\Public\SSI_Tools\ExampleProject.mpp

Note - the first column in your worksheet must match the ID or Unique in your Project:

The first column in the worksheet matches:

☐ ID ☒ Unique ID

Options that Delete All Existing Assignments and Replace with Values from Sheet

☐ Post as Work/Cost ☐ Post To Baseline ☐ Post As Resource Units

Options that Preserve Current Resource Assignments

☒ Post as Rem Work/Cost ☐ Post As Resource Units

☐ Allow Posting to Summary Items

Post to Project



After posting updated values

- Green cells indicate a new assignment, Yellow indicates an existing assignment.
- Cell notes in existing assignments lets you know if a value was changed.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1							MSP Res ID>>	1	2	3	4	5	6	7	8	9	10
2							Type	Hr	Hr	Hr	Hr	Hr	Hr	Hr	Hr	Hr	Hr
3							Rate>> and Cost (below)	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00
4							\$76,200	\$1,350	\$1,350	\$1,350	\$1,350	\$1,350	\$4,350	\$24,600	\$16,500	\$12,000	\$12,000
5	Unique ID	Name	Start	Finish	Duration	Summary	Res >> Sum Below	SW Engineer	HW Engineer	Systems Engineer	Program Manager	PM Office	Security Engineer	Productio n Lead	Productio n Support	Test Engineer	Test Tech
6	96	Implementation	9/13/21	11/10/21	43 days	Yes											
7	97	Implement of Target Product Solution	9/13/21	10/15/21	25 days	Yes											
8	98	Conduct Pilot	9/13/21	9/24/21	10 days	No	260	10	10	10	10	10	10	80	40	40	40
9	99	Complete Preparation of Operational Sites	9/13/21	9/17/21	5 days	No	80							40	40		
10	100	Deploy Solution to Production Environment	9/27/21	10/15/21	15 days	No	480							120	120	120	120
11	101	Conduct Operational Readiness Review (ORR)	10/18/21	11/10/21	18 days	Yes											
12	102	Generate Presentation Materials for ORR	10/18/21	10/22/21	5 days	No	100						40	40	20		
13	103	Ensure ORR Exit Criteria Has Been Met	10/25/21	10/25/21	1 day	No	8							8			
14	104	Conduct Operational Readiness Review (ORR)	10/26/21	10/27/21	2 days	No	48	8	8	8	8	8	8				
15	105	Close ORR Action Items	10/28/21	11/10/21	10 days	No	40							40			
16	106	Obtain ATO Approval Letter	11/10/21	11/10/21	0 days	No	0										
17	End																

2. Check the task in Microsoft Project to confirm that changes were imported

End of Exercise

Name:	Conduct Pilot	Duration:	10 days	☐ Effort driven	☐ Manually Scheduled	Previous	Next
Start:	9/13/21	Finish:	9/24/21	Task type:	Fixed Duration	% Complete:	0%
ID	Resource Name	Units	Work	Ovt. Work	Baseline Work	Act. Work	Rem. Work
7	Production Lead	100%	80h	0h	80h	0h	80h
8	Production Support	100%	40h	0h	40h	0h	40h
9	Test Engineer	100%	40h	0h	40h	0h	40h
10	Test Tech	100%	40h	0h	40h	0h	40h
1	SW Engineer	100%	10h	0h	0h	0h	10h
2	HW Engineer	100%	10h	0h	0h	0h	10h
3	Systems Engineer	100%	10h	0h	0h	0h	10h
4	Program Manager	100%	10h	0h	0h	0h	10h
5	PM Office	100%	10h	0h	0h	0h	10h
6	Security Engineer	100%	10h	0h	0h	0h	10h

End of Exercise



Validate Posted Values

Key to Posted Value Color Coding

- **YELLOW** – in the Resource column indicates a changed assignment in Microsoft Project
- **RED** – in the Resource column indicates a deleted assignment in Microsoft Project and is only used if *Options that Preserve Current Assignments and Changes Remaining Values Only* is chosen.
- **GREEN** – in the Resource column indicates an added assignment in Microsoft Project and is only used if *Options that Preserve Current Assignments* is chosen.
- Assignment column values not shaded were not posted.
- Task rows shaded **GREEN** were found in the project.
- Task rows shaded **RED** were not found in the project. (if the task was not found, no resource assignment values can be posted).