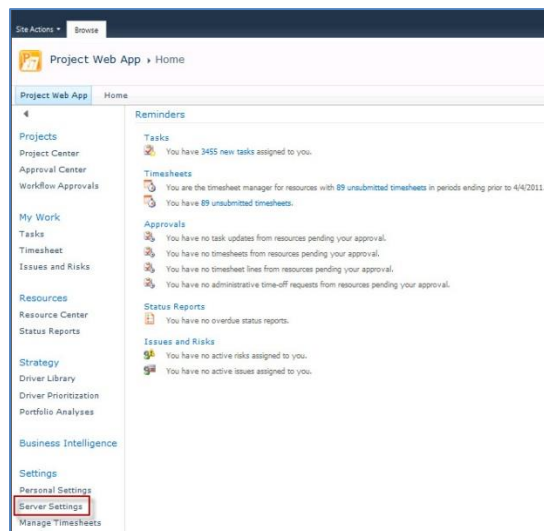




Setting up the RBS

The purpose of this document is to help explain how to set up a Resource Breakdown Structure (RBS) for your organization with Microsoft Project Server 2010. The RBS is an important feature in that it can be used to help with security settings and reporting relationships. The RBS does NOT have to be an exact copy of your organization's established Employee Organizational Chart but that chart can be used as a starting point. For this example, we will be using a sample organizational chart. A visual representation of that chart can be found at the end of this document.

To set up an RBS, you need to be logged into Microsoft Project Server 2010 as an Administrator or as a user given permissions to create or modify custom fields. From the Home page of Project Web Access, select Server Settings under the Settings section.



Server Settings

You are now in the Server Settings page. Under the Enterprise Data section, select Enterprise Custom Fields and Lookup Tables to define the RBS field and the Lookup Tables behind it.



Site Actions ▾

Project Web App ▸ Server Settings

This page provides access to various Project Server administration functions. The functions available to you depend on your permissions.

Project Web App Home

Projects Project Center Approval Center Workflow Approvals My Work Tasks Timesheet Issues and Risks Resources Resource Center Status Reports Strategy Driver Library Driver Prioritization	Security <ul style="list-style-type: none">Manage UsersManage GroupsManage CategoriesManage Security TemplatesProject Web App PermissionsManage Delegates	Enterprise Data <ul style="list-style-type: none">Enterprise Custom Fields and Lookup TablesEnterprise GlobalEnterprise CalendarsResource CenterAbout Project Server	Database Administration <ul style="list-style-type: none">Delete Enterprise ObjectsForce Check-in Enterprise ObjectsDaily Schedule BackupAdministrative BackupAdministrative RestoreOLAP Database Management	Look and Feel <ul style="list-style-type: none">Manage ViewsGrouping FormatsGantt Chart FormatsQuick Launch
	Time and Task Management <ul style="list-style-type: none">Fiscal PeriodsTime Reporting PeriodsTimesheet AdjustmentLine ClassificationsTimesheet Settings and DefaultsAdministrative TimeTask Settings and DisplayClose Tasks to Update	Queue <ul style="list-style-type: none">Manage Queue JobsQueue Settings	Operational Policies <ul style="list-style-type: none">Alerts and RemindersAdditional Server SettingsServer Side Event HandlersActive Directory Resource Pool SynchronizationProject SitesProject Site Provisioning SettingsBulk Update Project Sites	Workflow and Project Detail Pages <ul style="list-style-type: none">Enterprise Project TypesWorkflow PhasesWorkflow StagesChange or Restart WorkflowsProject Detail PagesProject Workflow Settings

Enterprise Custom Fields and Lookup Tables

There should already be a default RBS option under the Lookup Tables for Custom Fields section. Find it and click on it. If there is not one there already, just create one. This will take you to the RBS Lookup Table. From here we will create our table to support our custom RBS field.



Lookup Table	Type	Last Updated
Business Impact	Text	10/29/2009
Cost Type	Text	10/26/2009
Department	Text	11/18/2009
Force-In Criteria	Text	12/3/2009
Health	Text	10/26/2009
Plan_Flag	Text	12/8/2009
Position	Text	9/6/2010
Project Cost	Text	10/30/2009
Project Health	Text	10/30/2009
Project Quality	Text	10/30/2009
Project Resource	Text	10/30/2009
Project Schedule	Text	10/30/2009
RBS	Text	4/13/2011
Roles	Text	11/17/2009
Sample Areas Impacted	Text	10/26/2009

The Code Mask option box is simply defining how the levels will look. (Think of the levels as the reporting steps in an organizational chart.) In the example below, the sequence is Characters, the length is any and the separator is “/”. This means that if we have four levels in our RBS, (three steps in an organizational chart) it would be formatted like this “one/two/three/four”.

The Lookup Table section is where we will define our levels and give them descriptive terms. In this example, the starting point has only one code mask defined, therefore we could only go to one level in our Lookup Table. Since we will be using four levels, then we would need four rows defined for the Code Mask since that’s how many levels deep we are going.

The following screenshot shows the default RBS lookup table with only one level and no values.



Project Web App Home

Indicates a required field

Save Cancel

Name: Type a unique name for the lookup table. * Name: RBS

Type: The type for the lookup table. Type: Text

Code Mask
Specify the code mask for the lookup table. The code mask defines for each level the number and sequence of characters that are allowed. For Length, you can type Any, or a number from 1 through 255. For the separator, type from one through three characters.

Code preview: *
Code mask:

Sequence	Length	Separator
Characters	Any	.

Lookup Table
Edit the lookup table

Level Value Description

Level	Value	Description

Lookup Table definition

In the example below, you can see that we have added four levels to the code mask and you can see how those levels correspond with our organizational chart.



Type a unique name for the lookup table.

Type:

Code Mask
Specify the code mask for the lookup table. The code mask defines for each level the number and sequence of characters that are allowed. For Length, you can type Any, or a number from 1 through 255. For the separator, type from one through three characters.

Code preview:

Sequence	Length	Separator
Characters	Any	/
Characters	Any	/
Characters	Any	/
Characters	Any	/

Lookup Table
Edit the lookup table

Level	Value	Description
1	President	
2	Director of Marketing	
3	Manager of Marketing Research	
4	Ad Specialist	
4	Competitive Analyst	
3	Manager of Product Marketing	
4	Product Brand Specialist	

Buttons: [Add] [Delete] [Refresh] [Save] [Cancel] [Move Up] [Move Down]

Completed Lookup Table

Now that we have completed the Lookup Table, we can set up the Custom Field that will be displayed. Under the Enterprise Custom Fields section, select RBS.



Site Actions ▾

Project Web App ▸ Enterprise Custom Fields and Lookup Tables

View a summary of the custom fields and lookup tables defined for Project Web App. From this page, you can also drill in to create a new custom field or lookup table, or modify the definition of an existing custom field or lookup table.

Project Web App Home

Enterprise Custom Fields

New Field | Copy Field | Delete Field

Field	Department	Entity	Type	Behavior	Formula	Graphical indicators	Lookup Table	Last Updated
Business Impact		Project	Text	Not required	No	No	Business Impact	10/29/2009
CollinProposalField		Project	Text	Not required	No	No		10/20/2010
Cost Type		Resource	Text	Not required	No	No	Cost Type	10/26/2009
RBS		Resource	Text	Not required	No	No	RBS	10/26/2009

Enterprise Custom Fields

In order for our Custom Field to work properly, we have to tell the field how to populate the information. We are going to associate our RBS Lookup Table with the RBS Custom Field.

Name
Type a unique name for the custom field.
* Name: RBS

Description
Type a description for the custom field.
Description:

Entity and Type
The entity and type for this custom field.
Entity: Resource
Type: Text

Custom Attributes
Choose whether the field has a lookup table, a calculated formula, or neither.
 None
 Lookup Table [RBS]
 Choose a value to use as a default when adding new items
 Default value:
 Only allow codes with no subordinate values
 Allow multiple values to be selected from lookup table
 Use this field for matching generic resources
 Formula

Calculation for Assignment Rows
You can choose how this field gets rolled down to assignments.
 None
 Roll down, unless manually specified

Values to Display
Choose whether you want just the data or graphical indicators to be displayed. Graphical indicators are not displayed in all areas of Project Web App.
 Data
 Graphical indicators

Custom Field defined



Now we can open our Enterprise Resource Global file and begin to populate the RBS field. Once in the Enterprise Resource Global file, right click and select Insert Column. Select RBS from the list of available fields to insert.

	Resource Name	Type	Material	Initials	Group	Max.	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar	Code
1	Trainer	Work				100%	\$50.00/hr	\$0.00/hr	\$0.00	Prorated	Standard	
2	Tester	Work				100%	\$40.00/hr	\$0.00/hr	\$0.00	Prorated	Standard	
3	Adam Barr	Work				100%	\$95.00/hr	\$0.00/hr	\$0.00	Prorated	Standard	
4	Aaron Painter	Work				100%	\$85.00/hr	\$0.00/hr	\$0.00	Prorated	Night Shift	
5	Accountant	Work				100%	\$35.00/hr	\$0.00/hr	\$0.00	Prorated	Standard	
6	Bob Smith	Work				100%	\$100.00/hr	\$0.00/hr	\$0.00	Prorated	Standard	

Insert Column

Once the RBS field has been added, click in the field to see the organizational chart from the RBS Lookup Table. Select the appropriate title for each Resource Name.

	Resource Name	Type	RBS	Material	Initials	Group	Max.	Std. Rate	Ovt. Rate	Cost/Use	Accrue At	Base Calendar
1	Trainer	Work			T		100%	\$50.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
2	Tester	Work			T		100%	\$40.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
3	Adam Barr	Work			A		100%	\$95.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
4	Aaron Painter	Work			A		100%	\$85.00/hr	\$0.00/hr	\$0.00	Prorated	Night Shift
5	Accountant	Work			A		100%	\$35.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
6	Bob Smith	Work			B		100%	\$100.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
7	Goldie Ray	Work					100%	\$50.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
8	Katherine Jones	Work					100%	\$75.00/hr	\$0.00/hr	\$0.00	Prorated	Standard
9	William Weeks	Work					100%	\$50.00/hr	\$0.00/hr	\$0.00	Prorated	Standard

RBS Column

The example below shows exactly what our lookup table and organizational chart show in the text view for the RBS column that we just added. As an example, look at Goldie Ray, she is the Manager of Product Marketing and reports to the Director of Marketing who reports to the President of the company. It is very important to keep the RBS lookup table up to date and accurate as the organization



chart is updated with new positions or resources join or leave the company.

		Resource Name	Type	RBS	Material	Initials	Group	Max.	Std
1		Trainer	Work			T		100%	
2		Tester	Work			T		100%	
3		Adam Barr	Work			A		100%	
4		Aaron Painter	Work			A		100%	
5		Accountant	Work			A		100%	
6		Bob Smith	Work	President		B		100%	\$
7		Goldie Ray	Work	President/Director of Marketing/Manager of Product Marketing		G		100%	
8		Katherine Jones	Work	President/Director of Marketing		K		100%	
9		William Weeks	Work	President/Director of Marketing/Manager of Marketing Research		W		100%	

RBS assigned to a Resource Name

The example below shows the organizational chart as a visual representation of the RBS. Again, look at Goldie Ray, she is the Manager of Product Marketing and reports to the Director of Marketing who reports to the President of the company.

