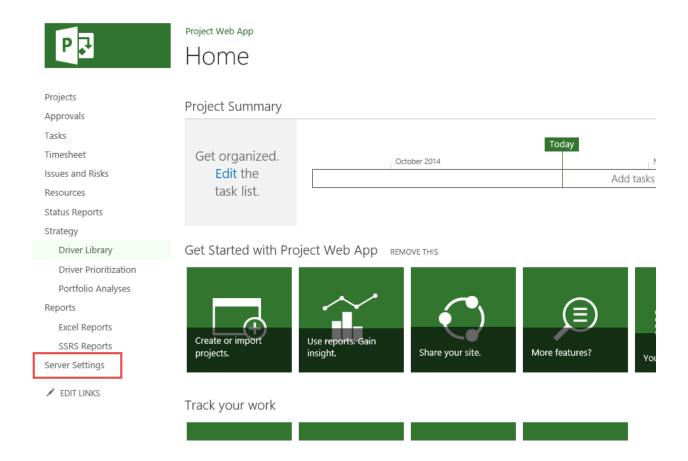**Setting up the RBS – Project Server 2013**

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 2013. 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 2013 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.

Project Web App

Home

Projects
Approvals
Tasks
Timesheet
Issues and Risks
Resources
Status Reports
Strategy
   Driver Library
   Driver Prioritization
   Portfolio Analyses
Reports
   Excel Reports
   SSRS Reports
Server Settings
✎ EDIT LINKS

Project Summary

Get organized.
Edit the task list.

Today

October 2014

Add tasks

Get Started with Project Web App   REMOVE THIS

Create or import projects.

Use reports. Gain insight.

Share your site.

More features?

You

Track your work

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.

Project Web App

PWA Settings for :

Personal Settings
Manage My Alerts and Reminders
Manage My Resources' Alerts and Reminders
My Queued Jobs
Manage Delegates
Act as a Delegate

Enterprise Data
Enterprise Custom Fields and Lookup Tables
Enterprise Calendars
Resource Center

Queue and Database Administration
Manage Queue Jobs
Delete Enterprise Objects
Force Check-in Enterprise Objects

Look and Feel
Manage Views
Grouping Formats
Gantt Chart Formats
Quick Launch

Time and Task Management
Fiscal Periods
Time Reporting Periods
Line Classifications
Timesheet Settings and Defaults
Administrative Time
Task Settings and Display
Manage Timesheets
Timesheet Managers

Operational Policies
Additional Server Settings
Active Directory Resource Pool Synchronization
Connected SharePoint Sites

Workflow and Project Detail Pages
Enterprise Project Types
Workflow Phases

Security
Manage Users
Manage Groups

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 Tables for Custom Fields

NEW LOOKUP TABLE	COPY LOOKUP TABLE	✕ DELETE LOOKUP TABLE		
Lookup Table ▲			Type	Last Updated
Cost Type			Text	7/22/2014
Department			Text	7/22/2014
Health			Text	7/22/2014
RBS			Text	7/22/2014

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".
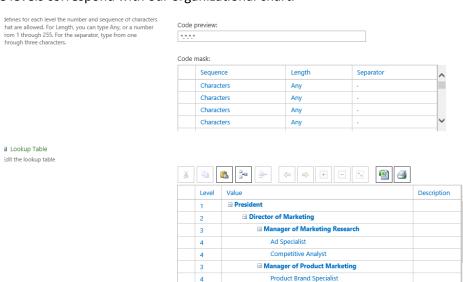
The Lookup Table section is where we will define our levels and give them descriptive terms. In this example, the starting point has only one code mask defined, therefore we could only go to one level in our Lookup Table. Since we will be using four levels, then we would need four rows defined for the 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. (Note: It is common practice to use the word "Table" in your Lookup Tables to help differentiate the tables from the custom fields.)

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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.

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.

Enterprise Custom Fields

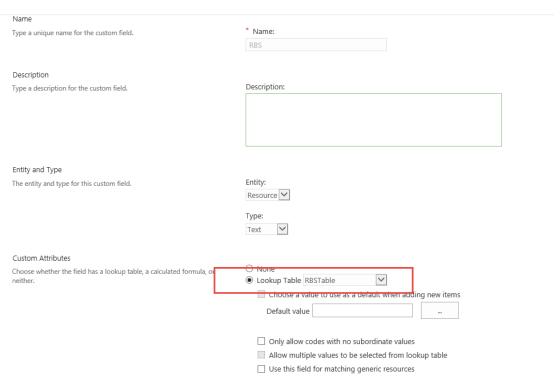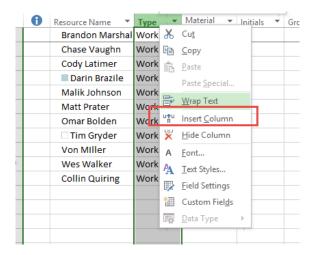| Field ▲	Department	Entity	Type	Behavior	Formula	Graphical indicators	Lookup Table	Last Updated
Baseline Indicator (Task)		Task	Number	Not required	Yes	Yes		7/30/2014
Baseline v Finish (Project)		Project	Number	Not required	Yes	Yes		7/30/2014
BaselineExistsProj		Project	Text	Not required	Yes	Yes		7/30/2014
Cost Indicator		Project	Text	Required	No	Yes		7/30/2014
Cost Task		Task	Text	Not required	No	Yes	1to4Table	7/30/2014
Cost Type		Resource	Text	Not required	No	No	Cost Type	7/30/2014
Flag Status		Task	Flag	Not required	No	No		7/30/2014
Health		Task	Text	Not required	No	No	Health	7/30/2014
Location		Project	Text	Required	No	No	LocationTable	7/30/2014
Project Departments		Project	Text	Editable in SharePoint Tasks List Projects	No	No	Department	7/30/2014
Project Status		Project	Text	Required	No	No	StatusTable	7/30/2014
RBS		Resource	Text	Not required	No	No	RBSTable	7/30/2014
Res Info		Resource	Text	Not required	No	Yes	Cost Type	7/30/2014
Resource Departments		Resource	Text	Not required	No	No	Department	7/30/2014
ResourceIndicator		Resource	Text	Not required	Yes	Yes		7/30/2014

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.
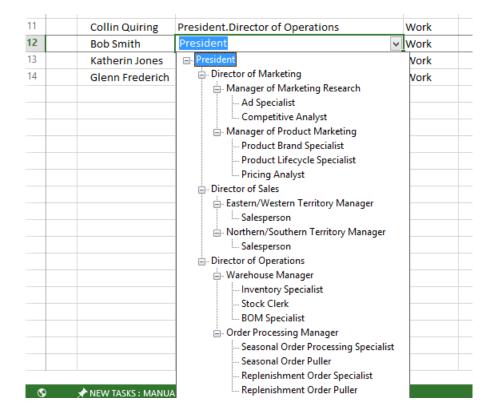
Now we can open our Resources individually in PWA and enter information for each Resource. Or, we can go to the Enterprise Resource Global file and begin to populate the RBS field. Once in the Enterprise Resource Global file, right click and select Insert Column. Select RBS from the list of available fields to insert.

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.

After assigning the Resource's their appropriate RBS, save and close the Resource Global file.

The example below shows the organizational chart as a visual representation of the RBS. If you look at the chart below you will see the positions in the organization for Collin Quiring and Bob Smith we have matched the RBS to the organizational chart.

As a reminder, you do NOT have to match the RBS to the organizational chart and that was used as an example only because it is a common mindset and is easy to use in an example.

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President — Bob Smith

- **Director of Marketing** — Katherine Jones
  - **Manager of Marketing Research** — William Weeks
    - **Ad Specialist** — Lonnie Seitz
    - **Competetive Analyst** — Carlos Pena
  - **Manager of Product Marketing** — Goldie Ray
    - **Product Brand Specialist** — Debbie Drittler
      - **Pricing Analyst** — Josh Foster
    - **Product Lifecycle Specialist** — Saundra Polanco
- **Director of Sales** — Glenn Frederich
  - **Eastern/Western Territory Manager** — Tiffany Mahn
    - **Salesperson** — Raymond Lear
    - **Salesperson** — Connie Hewer
  - **Northern/Southern Territory Manager** — Terry Sotor
- **Director of Operations** — Collin Quiring
  - **Warehouse Manager** — James Kin
    - **Inventory Specialist** — Katrina James
      - **Stock Clerk** — Edward Gore
    - **BOM Specialist** — Charles Woo
  - **Order Processing Manager** — Kellie Ale
    - **Seasonal Order Processing Specialist** — Nico Saro
    - **Replenishment Order Specialist** — Mandi Woods
  - **Distribution Manager** — Jerry Vaughan
    - **Seasonal Order Fulfilment** — Lou Phillip
      - **Seasonal Order Puller** — Victoria Olaf
    - **Replenishment Order Fulfillment** — Jane Doe
      - **Replenishment Order Puller** — Jerri Chan