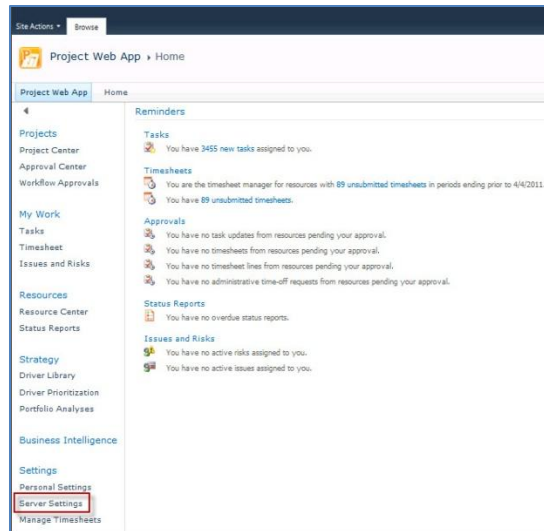




# PMP Specialists

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.



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The screenshot shows the 'Project Web App > Server Settings' page. The left navigation pane includes sections like 'Projects', 'My Work', 'Resources', and 'Strategy'. The main content area is divided into several tabs: Security, Enterprise Data, Database Administration, Look and Feel, Time and Task Management, Queue, Operational Policies, and Workflow and Project Detail Pages. The 'Enterprise Data' tab is active, and 'Enterprise Custom Fields and Lookup Tables' is highlighted with a red box.

*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.



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Site Actions System Account

Workflow Type	Project	Text	Not required	No	No	WorkflowType	10/29/2009
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Lookup Tables for Custom Fields

New Lookup Table Copy Lookup Table Delete Lookup Table

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.



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Project Web App Home

\* Indicates a required field

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

\* Name:

**Type**  
The type 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: |

Code mask:

Sequence	Length	Separator
Characters	Any	.

**Lookup Table**  
Edit the lookup table

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.



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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	

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

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



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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.

The screenshot shows a configuration window for a custom field. The sections and their contents are as follows:

- Name:** \* Name: RBS
- Description:** Description: (empty text box)
- Entity and Type:** Entity: Resource, Type: Text
- Custom Attributes:**  Lookup Table | RBS (highlighted with a red box). Other options include None, Formula, and checkboxes for default values and multiple selections.
- Calculation for Assignment Rows:**  Roll down, unless manually specified
- Values to Display:**  Data

*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.



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	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.



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	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.



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