Replacing one role with another, in bulk, on tasks - The below mentioned method is particularly useful when, let's say you want to make the changes to the project template which has a large WBS structure, and a lot of role assignments to tasks.

Access the project's Task > Assignments page

oject: NJ - Test Proje	ct - 062315 - Tasks	- Assignments					*	Scenario: [Select
ter								
Parent Task		₩ ⊗		Resource Type	All 🗸			
Include All Sub-Tasks	2				Resources and Roles	y .		
Exclude Completed Tasks	2			Assigned to	# 🛇			
From Date				Roles		0 #		
To Date								
Filter Show All	Clear							
]	Name		Role		Start	Finish	Actuals	ETC
Select Evaluation Team 🔦					5/24/17	7/5/17	0.00	96
L→ Meyer, Terry			i=				0.00	(
🛶 Project Manager 👔			Project Manager		5/24/17	7/5/17	0.00	96
Gather Customer Requireme	nts				7/9/15	7/10/15	0.00	4
🛶 Architect - England 🚺]		Architect		7/9/15	7/10/15	0.00	1
🔓 Business Analyst 🚺			Business Analyst		7/9/15	7/10/15	0.00	1
→ Project Manager []			Project Manager		7/9/15	7/10/15	0.00	1

Using the Assigned To filter option, select the role that needs to be replaced

Project: NJ - Test Pro	oject - 062315 ·	- Tasks - Assignments						*	Scenario: [Select]
Filter									
Parent Task	1	# ⊙		Resource T	Гуре	Al 🗸			
Include All Sub-Tasks	~					Resources and Role	8 🗸		
Exclude Completed Tasks	~			Assigne	ed to	#⊗			
From Date									
Trombate				Ri	oles		© #		
To Date									
Filter Show All	Clear								
Project: N.I Test Pro	niect - 062315 .	· Tasks - Assignments						+/-	Scenario: [Select]
Parent Task	Jeet - 002010 -	±⊗		Resource T	ype	All		_	
Include All Sub-Tasks	✓					Resources and Roles	×		
Exclude Completed Tasks	✓			Assigned	d to	Business Analyst	HO		
From Date									
				Ro	oles		© #		
To Date									
Filter Show All	Clear								
		News		Dele		64t	Tinink	A stude	FTC
Gather Customer Require	ements	Name	_	Role	-	Start 7/9/15	Finish 7/10/15	Actuals 0.00	ETC 16.00
Business Analyst	Ô			Business Analyst		7/9/15	7/10/15	0.00	16.00
Create RFP						7/16/15	7/17/15	0.00	16.00
□ 🔓 Business Analyst	()			Business Analyst		7/16/15	7/17/15	0.00	16.00
Review RFP Responses						7/20/15	7/21/15	0.00	16.00
🔲 👍 Business Analyst	Q			Business Analyst		7/20/15	7/21/15	0.00	16.00
POC						7/27/15	7/28/15	0.00	
□ L→ Business Analyst			Ξ	Business Analyst		7/27/15	7/28/15	0.00	
Review Pricing and Final						7/29/15	7/30/15	0.00	
□ 🕞 Business Analyst	0			Business Analyst		7/29/15	7/30/15	0.00	16.00

Select the checkbox on the label section of the list view, and click on Replace

Parent Task		H 😒		Resource Type	e All 🗸			
Include All Sub-Tasks	•				Resources and Roles	~		
xclude Completed Tasks	•			Assigned to	Business Analyst	H 🛇		
From Date				Role	3	O H		
To Date						U II		
Filter Show All	Clear							
	Narr	1e		Role	Start	Finish	Actuals	ETC
Gather Customer Require	ements				7/9/15	7/10/15	0.00	1
General Ge	٥		E	Business Analyst	7/9/15	7/10/15	0.00	1
Create RFP					7/16/15	7/17/15	0.00	1
⊢ Business Analyst	Q			Business Analyst	7/16/15	7/17/15	0.00	
Review RFP Responses					7/20/15	7/21/15	0.00	
→ Business Analyst	٥			Business Analyst	7/20/15	7/21/15	0.00	
POC					7/27/15	7/28/15	0.00	
	Q			Business Analyst	7/27/15	7/28/15	0.00	
General Ge	-				7/29/15	7/30/15	0.00	
	l Proposals							

On the corresponding window, select the role that needs to replace the existing one, and click **Replace**

usiness Analyst		7/9/15	7/10/15	16.00 Gather Customer Requ	rements					
isiness Analyst		7/27/15	7/28/15	16.00 POC						
Business Analyst		7/29/15	7/30/15	16.00 Review Pricing and Final Proposals 16.00 Review RFP Responses						
Business Analyst		7/20/15	7/21/15							
Filter: System Default								Q		
Resource/Role Name				Resource Type Lat	or 🗸					
Resource/Role ID				Booking Status All	v					
Resource OBS	0 #			Zero Allocation No	×					
				Power Filter [Buil	d Power Filter]					
Resource OBS - Filter Mode Unit										
Resource OBS - Filter Mode Uni	only v									
Resource OBS - Filter Mode Uni Project Role	only V									
Project Role	0 H	Project Role	Staff OBS Unit	Booking Status	Start	Finish	Average Allocation %	Allocation		
Project Role Filter Show All	Save Filter Clear	Project Role Architect	Staff OBS Unit	Booking Status	Start 6/23/15	Finish 12/31/15	Average Allocation %	Allocation 1,104.0		
Project Role Filter Show All Resource/Role Architect - Austria	Save Filter Clear Resource/Role ID		Staff OBS Unit				-			
Project Role Filter Show All Resource/Role Architect - Austria	Save Filter Clear Resource/Role ID csk.architect	Architect	Staff OBS Unit	Soft	6/23/15	12/31/15	100.0%	1,104.0		
Project Role Filter Show All Resource/Role Architect - Austria Architect - England	Clear Save Filter Clear Resource/Role ID csk.architect csk.architect	Architect	Staff OBS Unit	Soft Soft	6/23/15 6/23/15	12/31/15 7/5/17	- 100.0%	1,104.0 4,256.0		
Project Role Filter Show All Resource/Role Architect - Austria Architect - Austria Architect - England Business Analyst	Save Filter Clear Resource/Role ID csk.archtect csk.archtect csk.businessAnalyst	Architect	Staff OBS Unit	Soft Soft Soft	6/23/15 6/23/15 6/23/15	12/31/15 7/5/17 12/31/15		1,104.0 4,256.0 1,104.0		

The existing role will be replaced by the new role on the tasks that were assigned to the old role

Include All Sub-Tasks				Resources and Roles	~		
Exclude Completed Tasks			Assigned to	Architect - England	H 🛇		
From Date			Roles		0 #		
To Date							
Filter Show All Clear							
1	Name	Role		Start	Finish	Actuals	ETC
Gather Customer Requirements				7/9/15	7/10/15	0.00	32.0
🛶 Architect - England		Architect		7/9/15	7/10/15	0.00	32.0
Create RFP				7/16/15	7/17/15	0.00	16.0
→ Architect - England		Business Analyst		7/16/15	7/17/15	0.00	16.0
Review RFP Responses				7/20/15	7/21/15	0.00	16.0
] 👍 Architect - England [Business Analyst		7/20/15	7/21/15	0.00	16.0
POC				7/27/15	7/28/15	0.00	16.0
→ Architect - England		Business Analyst		7/27/15	7/28/15	0.00	16.0
Review Pricing and Final Proposals				7/29/15	7/30/15	0.00	16.0
🛶 Architect - England [Business Analyst		7/29/15	7/30/15	0.00	16.0
							Displaying 1 - 10 of 10