

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

Project: NJ - Test Project - 062315 - Tasks - Assignments Scenario: [–Select–]

Filter

Parent Task

Include All Sub-Tasks

Exclude Completed Tasks

From Date

To Date

Filter

Show All

Clear

Resource Type

Resources and Roles

Assigned to

Roles

	Name	Role	Start	Finish	Actuals	ETC
<input type="checkbox"/>	Select Evaluation Team		5/24/17	7/5/17	0.00	96.00
<input type="checkbox"/>	↳ Meyer, Terry				0.00	0.00
<input type="checkbox"/>	↳ Project Manager	Project Manager	5/24/17	7/5/17	0.00	96.00
<input type="checkbox"/>	Gather Customer Requirements		7/9/15	7/10/15	0.00	48.00
<input type="checkbox"/>	↳ Architect - England	Architect	7/9/15	7/10/15	0.00	16.00
<input type="checkbox"/>	↳ Business Analyst	Business Analyst	7/9/15	7/10/15	0.00	16.00
<input type="checkbox"/>	↳ Project Manager	Project Manager	7/9/15	7/10/15	0.00	16.00

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

Project: NJ - Test Project - 062315 - Tasks - Assignments Scenario: [–Select–]

Filter

Parent Task

Include All Sub-Tasks

Exclude Completed Tasks

From Date

To Date

Filter

Show All

Clear

Resource Type

Resources and Roles

Assigned to

Roles

Project: NJ - Test Project - 062315 - Tasks - Assignments Scenario: [–Select–]

Filter

Parent Task

Include All Sub-Tasks

Exclude Completed Tasks

From Date

To Date

Filter

Show All

Clear

Resource Type

Resources and Roles

Assigned to

Roles

	Name	Role	Start	Finish	Actuals	ETC
<input type="checkbox"/>	Gather Customer Requirements		7/9/15	7/10/15	0.00	16.00
<input type="checkbox"/>	↳ Business Analyst	Business Analyst	7/9/15	7/10/15	0.00	16.00
<input type="checkbox"/>	Create RFP		7/16/15	7/17/15	0.00	16.00
<input type="checkbox"/>	↳ Business Analyst	Business Analyst	7/16/15	7/17/15	0.00	16.00
<input type="checkbox"/>	Review RFP Responses		7/20/15	7/21/15	0.00	16.00
<input type="checkbox"/>	↳ Business Analyst	Business Analyst	7/20/15	7/21/15	0.00	16.00
<input type="checkbox"/>	POC		7/27/15	7/28/15	0.00	16.00
<input type="checkbox"/>	↳ Business Analyst	Business Analyst	7/27/15	7/28/15	0.00	16.00
<input type="checkbox"/>	Review Pricing and Final Proposals		7/29/15	7/30/15	0.00	16.00
<input type="checkbox"/>	↳ Business Analyst	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**

Project: NJ - Test Project - 062315 - Tasks - Assignments

Scenario: [--Select--]

Parent Task

Include All Sub-Tasks

Exclude Completed Tasks

From Date

To Date

Filter

Show All

Clear

Resource Type

All

Resources and Roles

Assigned to

Business Analyst

Roles

<input checked="" type="checkbox"/>	Name	Role	Start	Finish	Actuals	ETC
<input checked="" type="checkbox"/>	Gather Customer Requirements		7/9/15	7/10/15	0.00	16.00
<input checked="" type="checkbox"/>	↳ Business Analyst	Business Analyst	7/9/15	7/10/15	0.00	16.00
<input checked="" type="checkbox"/>	Create RFP		7/16/15	7/17/15	0.00	16.00
<input checked="" type="checkbox"/>	↳ Business Analyst	Business Analyst	7/16/15	7/17/15	0.00	16.00
<input checked="" type="checkbox"/>	Review RFP Responses		7/20/15	7/21/15	0.00	16.00
<input checked="" type="checkbox"/>	↳ Business Analyst	Business Analyst	7/20/15	7/21/15	0.00	16.00
<input checked="" type="checkbox"/>	POC		7/27/15	7/28/15	0.00	16.00
<input checked="" type="checkbox"/>	↳ Business Analyst	Business Analyst	7/27/15	7/28/15	0.00	16.00
<input checked="" type="checkbox"/>	Review Pricing and Final Proposals		7/29/15	7/30/15	0.00	16.00
<input checked="" type="checkbox"/>	↳ Business Analyst	Business Analyst	7/29/15	7/30/15	0.00	16.00

Assign

Replace

Remove

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

Business Analyst

7/9/15

7/10/15

16.00

Gather Customer Requirements

Business 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

Business Analyst

7/20/15

7/21/15

16.00

Review RFP Responses

Filter: System Default

Resource/Role Name

Resource/Role ID

Resource OBS

Resource OBS - Filter Mode

Project Role

Filter

Show All

Save Filter

Clear

Resource Type

Labor

Booking Status

All

Zero Allocation

No

Power Filter

[Build Power Filter]

Resource/Role	Resource/Role ID	Project Role	Staff OBS Unit	Booking Status	Start	Finish	Average Allocation %	Allocation
<input type="radio"/> Architect - Austria	csk.architect	Architect		Soft	6/23/15	12/31/15	100.0%	1,104.00
<input checked="" type="radio"/> Architect - England	csk.architect	Architect		Soft	6/23/15	7/5/17	100.0%	4,256.00
<input type="radio"/> Business Analyst	csk.businessAnalyst	Business Analyst		Soft	6/23/15	12/31/15	100.0%	1,104.00
<input type="radio"/> Meyer, Terry	tlmeyer			Soft	6/23/15	12/31/15	100.0%	1,104.00
<input type="radio"/> Project Manager	csk.projectManager	Project Manager		Soft	6/23/15	12/31/15	100.0%	1,104.00

Displaying 1 - 5 of 5

Replace

Return

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

Project: NJ - Test Project - 062315 - Tasks - Assignments

Scenario: [--Select--]

Include All Sub-Tasks

Exclude Completed Tasks

From Date

To Date

Filter

Show All

Clear

Resources and Roles

Assigned to

Architect - England

Roles

<input type="checkbox"/>	Name	Role	Start	Finish	Actuals	ETC
<input type="checkbox"/>	Gather Customer Requirements		7/9/15	7/10/15	0.00	32.00
<input type="checkbox"/>	↳ Architect - England	Architect	7/9/15	7/10/15	0.00	32.00
<input type="checkbox"/>	Create RFP		7/16/15	7/17/15	0.00	16.00
<input type="checkbox"/>	↳ Architect - England	Business Analyst	7/16/15	7/17/15	0.00	16.00
<input type="checkbox"/>	Review RFP Responses		7/20/15	7/21/15	0.00	16.00
<input type="checkbox"/>	↳ Architect - England	Business Analyst	7/20/15	7/21/15	0.00	16.00
<input type="checkbox"/>	POC		7/27/15	7/28/15	0.00	16.00
<input type="checkbox"/>	↳ Architect - England	Business Analyst	7/27/15	7/28/15	0.00	16.00
<input type="checkbox"/>	Review Pricing and Final Proposals		7/29/15	7/30/15	0.00	16.00
<input type="checkbox"/>	↳ Architect - England	Business Analyst	7/29/15	7/30/15	0.00	16.00

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