Adding and Assigning Resources and Expenses in Primavera P6
Adding and Assigning Resources and Expenses in P6

Welcome back! This lesson is all about Assigning Resources and Expenses in P6. In this lesson you will see that costs are associated to a project by assigning resources or expenses to activities. You will learn how to add new resources to your database, assign those resources to activities and how to add expenses to activities as well.

Let’s begin. In this section, we will work with resources first and then move on to expenses later in the lesson. You will be working with Construction section of the Manufacturing Facility Expansion Project, shown here.

Now let’s talk about Resources.

Resources are essentially the personnel and equipment that perform work on activities in your project. Materials, such as a piping or insulation, are also considered to be resources. Thus, a resource comes in 3 flavours in P6: Labour (personnel), non-labour (equipment), and material.
Adding and Assigning Resources and Expenses in P6

Let’s get started by showing you how to assign resources to activities. To work with resources, you will want to navigate to Resource Tab. In the bottom half of the screen. Click the Resources tab.

The Resource tab will show you details about the resources assigned to the highlighted activity. Right now, you are looking at A1170 and you can see there are no resources assigned. So, let’s assign a resource to the activity. Click Add Resource button in the bottom left-hand corner of the screen.

Ok. The Assign Resources window comes up. It contains the list of all the resources in your company. The resources to be used on your project have been setup under the subheading “MFE Resources”. Activity A1170 will need an Electrician, so go ahead and select the Electrician in the list. Select EL - Electrician in the list.

Click the Assign button to luck in your choice.

The assign resources window can be closed now. It stays open for you incase you would like to add more than one resources to the activity. Click the Close button to close the window.
Adding and Assigning Resources and Expenses in P6

Let’s look at the results. Notice the assigned Electrician shows up in 2 places on your screen. First, you see details about the assignment shown on the Resources tab. But also notice the assignment shown in the Resources column. This makes it easy to view who is assigned work on an activity when scrolling through your project plan.

Now let’s understand what all of these fields are for. When you assign a resource to an activity, some of the fields values shown here are pulled in from the resources profile and some values are automatically calculated. To better understand each field, hover your mouse over the highlighted boxes to display information about each.

In the next example, you will be working with non-labour resources. Let’s look at Activity A1080 – Excavate site. Click on Activity B1080 to highlight it.

Good. You have seen that you can add resources using the “Add Resources” button on the Resources Tab. But there’s another way to accomplish the same thing in the columns view. Click in the Resource Column for Activity A1080.
Adding and Assigning Resources and Expenses in P6

For this activity, you will assign some excavation equipment and an operator. Select Resource **Ex – Excavator** in the list.

You can highlight more than one resource at a time by shift – clicking. Go ahead and try it. **Hold down the Shift key** on your keyboard and click the **Ex-Op Excavator Operator** resource at the same time.

Excellent! Now, assign both resources to the activity at the same time. Click the **Assign button** to assign both resources to the activity.

Now you have assigned both resources to Activity A1080. Did you notice the different icons beside the resources on the Resources tab?

Labour resources are usually represented by a blue man icon. You will notice that non-labour resources. (equipment) are shown with a gear icon. Let’s move on to another activity. Select **Activity A1070**
Adding and Assigning Resources and Expenses in P6

So far you have learned how to assign existing resources from your enterprise resource pool to an activity on your project. It is also essential to also know how to create and add new resources to your resource pool. To accomplish this, let’s navigate to what Primavera calls the Resource Dictionary. Click the Resources button on the Directory Bar to navigate to the Resource Directory.

The screen shown here is called the Resource Directory. Through this screen, you can view, edit and manage your enterprise resource pool. The resources shown here can be assigned to any project in your database. Part of the power in using Primavera to manage your enterprise’s projects is this centralized resource pool where you can share resources across projects. Using other tools in Primavera, you can then manage and analyze how your resources are being used across the company.

By looking around, you have probably noticed that resources in the list are organized in hierarchies. For example, there is a list of subcontractor resources organized under the heading “subcontractors”. There are many ways to organize the resources designed for your MFE project are also organized under the appropriate heading.
Adding and Assigning Resources and Expenses in P6

Details about resources are shown in the Resource Details View in the bottom half of the screen. In case you can’t see it, turn on the Resource Details View. Click on the Display Bar to bring up the Display menu. Select Details from the menu, but in this case our details view is already checked.

Each tab in the details view displays configurable fields for different aspects of a resource. The Genera Tab, shown here, displays and let’s you update information such as name, contact details and resource ID. You will see some of these tabs shortly. The next step for your project is to add a new resource to your resource pool. Let’s get to it. Click the Add button on the Command bar.

A new resource, “R”, is now shown under the MFE resources heading and is ready for you to configure. You will enter the resource’s profile information using the tabs in the bottom half of your screen. This resource will become a Construction Labourer that you will assign to your project. The first item to enter is a unique Resource ID. Type “CL” in the Resource ID field and then press ENTER.
Adding and Assigning Resources and Expenses in P6

Now, give your resource a name. Type Construction Labourer in the Resource Name field and then press ENTER.

Good work! Let's move on to the Details tab. Click the Details Tab.

Take a walk through the different sections of the Details Tab. Hover your mouse over each coloured box to see a detailed explanation of key fields. You will not make any changes on to the fields on this tab. When you are done, click the Units and Prices tab.

The units and prices tabs contains a few key fields you should know about. Hover your mouse over the highlighted boxes for more information on each.

Let's set the Standard Rate Field that your resource charge to activities. Type 35.75 in the Standard Rate Field and then press ENTER.

Great. Your new resource is now configured and ready to be assigned to your project. Let's go back to your project's activities. Click the Activities button on the Directory Bar.
Adding and Assigning Resources and Expenses in P6

Occasionally, you will want to assign the same resource to more than one activity. We will show you a shortcut that will allow you to assign the same resource to multiple activities in one step. Let’s now assign your new – Construction Labourer to activities A1070 and A1120. You will want to select both activities at the same time. Select A1070, hold down the Control key on your keyboard and click A1120 to add it to your selection.

Now, you want to assign your new Construction Labourer resource to these two activities on one step. Notice the Add Resource button at the bottom of your screen is grayed-out. The Details view, the bottom half of your screen, will become grayed-out if you select more than one activity at a time, as you have done. The buttons and the views will not work – they were meant to display information for only one activity at a time and cannot work if you select more than one activity in the activity list. However, the buttons on the Command bar to the right will help you if you are working with multiple activities at the same time. Click the Resource button on the Command bar to assign a Resource to these two activities.
Adding and Assigning Resources and Expenses in P6

The assign resource window comes up. Notice your new resource is already selected. Click the **Assign button**.

Click the **Close button** to close the window.

Notice Construction Labourer shows up in the **Resources column** beside each activity. Just to re-iterate, because you have 2 activity selected, the bottom half of your screen, the Details view, doesn’t show the new assignment. If you select just 1 activity, you will see the assignment on the Resources tab. Go ahead and select **Activity A1070**.

Now, with only 1 activity highlighted in the list, the Details view becomes functional again and you can see the assignment details. So far we have done a lot of work with resources in this lesson. Now it’s time to move on to **Expenses**. Click the **Expenses tab in the Directory bar**.

Expenses are **non-resource costs** associated with an activity. A few examples include: travel costs, costs to move equipment to a work site. Primavera provides you with the ability to track these costs along with their associated activities. You will be tracking costs
Adding and Assigning Resources and Expenses in P6

associated with renting a fence for your site. Let’s get started. Click the Add button to add a new expense.

Let’s give your new expenses a name. type “Fence Rental” in the expense item field and press ENTER.

Primavera let’s you categorize your expenses, in case you have many of them. Click the Expense Category field to bring up the category list.

Select Equipment from the category list.

Click Assign button.

Now you will indicate how much fencing you will be renting. Type “300” in the budgeted unit field.

The fencing is rented out by the foot. Type “Ft” in the unit of measure field.

The fencing costs $2.25 per foot. Type “2.10” in the unit of measure field.

Primavera has calculated the total cost of the Fence Rental expense to be $630.00.
Adding and Assigning Resources and Expenses in P6

Excellent work! This segment of the courseware is complete! You have learned how to assign resources to activities in a few different ways, and how to create new resources for your project and you worked with adding expense items to activities and you learned about the Summary Tab. You can now proceed to the next lesson.