Table of Contents

Tutorial C: Assigning Resources and Resource Overallocations

Introduction

In this tutorial, we enter a single activity and use Task Information to assign a resource to the activity. We then create a resource overallocation and examine how MSP presents reports showing the resource overallocation.

Initial Settings

Set the week to start on a Sunday

Set the project start date be 2 July 2017.

Set the calendar for July and August 2017 so that there are no weekends or holidays.

The following screens will give you hints how to do the initial settings. For further information, please refer to previous tutorial (Tutorial B).

Save the project

- Click on **File->Save As**. Follow the prompts and save the project as **TutorialC**

Examine start up settings

- Click on **File->Options**

- Select **Schedule** from the left panel

- Check your settings to see if they are the same as following.
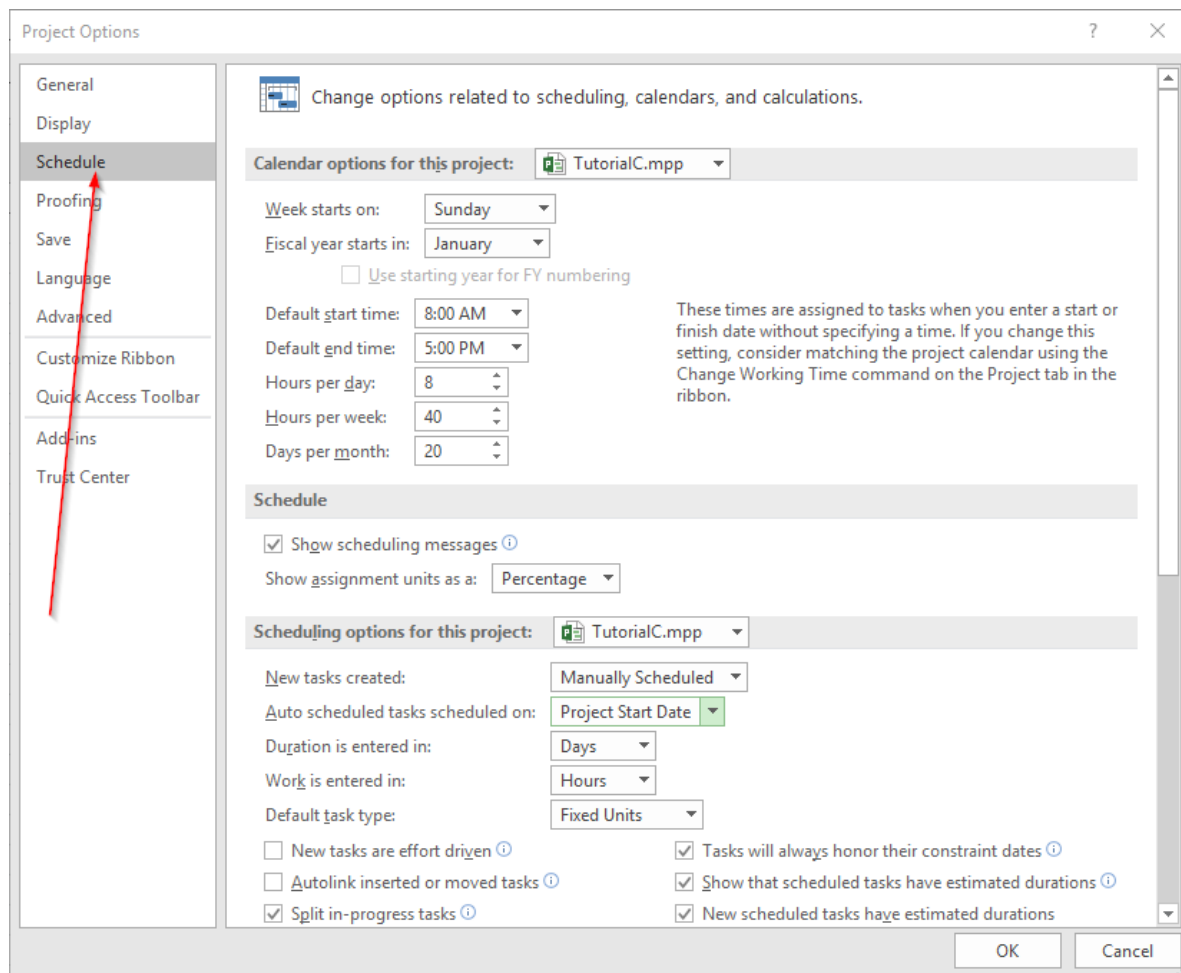
- Click **OK** button after finish.

Enter Resources W1 and W2

Load the Resource Sheet

- Click on **Resource->Team Planner**, then select **Resource Sheet**, or click on **View->Resource Sheet**

Enter Resources

Enter the following details:
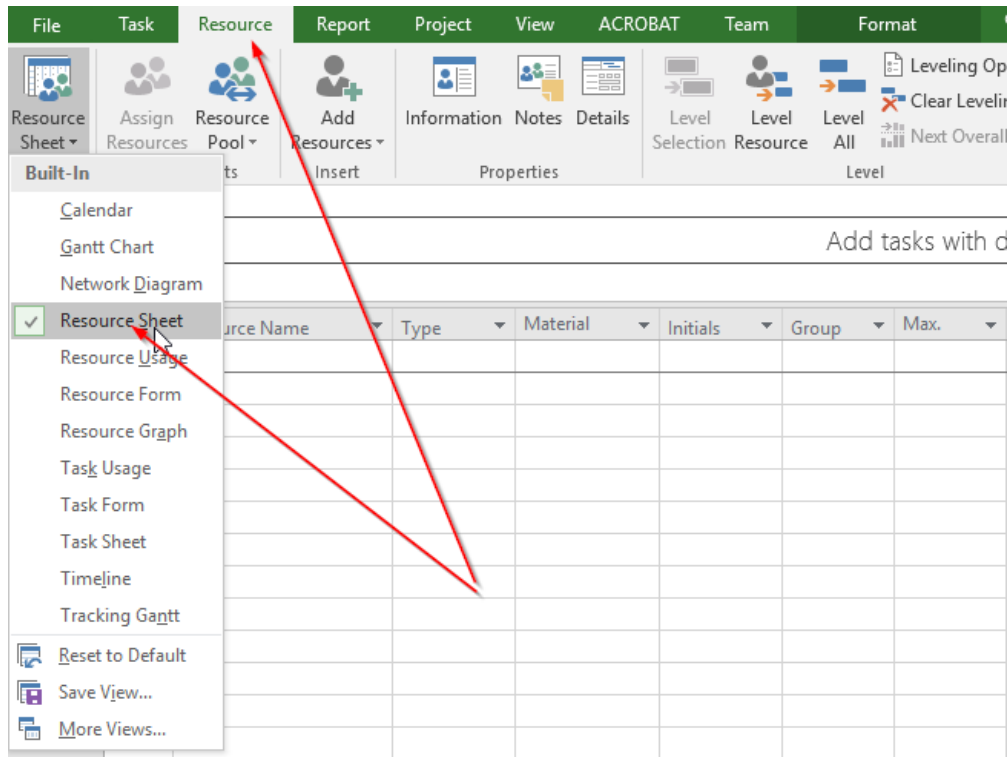
Resource Name	Initials	Max. Units	Std. Rate
W1	W1	100%	$18.00/hr
W2	W2	100%	$18.00/hr

Enter ACTIVITY A

Load the Gantt Chart

- Click on **View->Gantt Chart**

- Enter the following details:

Task Name	Duration
ACTIVITY A	5 days
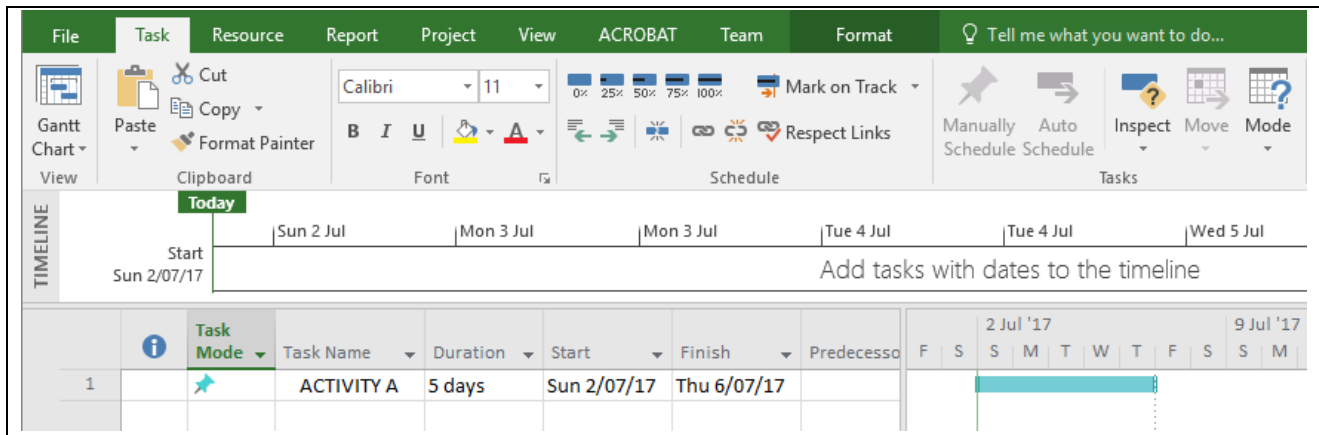
Examine the Timescale settings

Double click on the header to bring up the Timescale dialog box
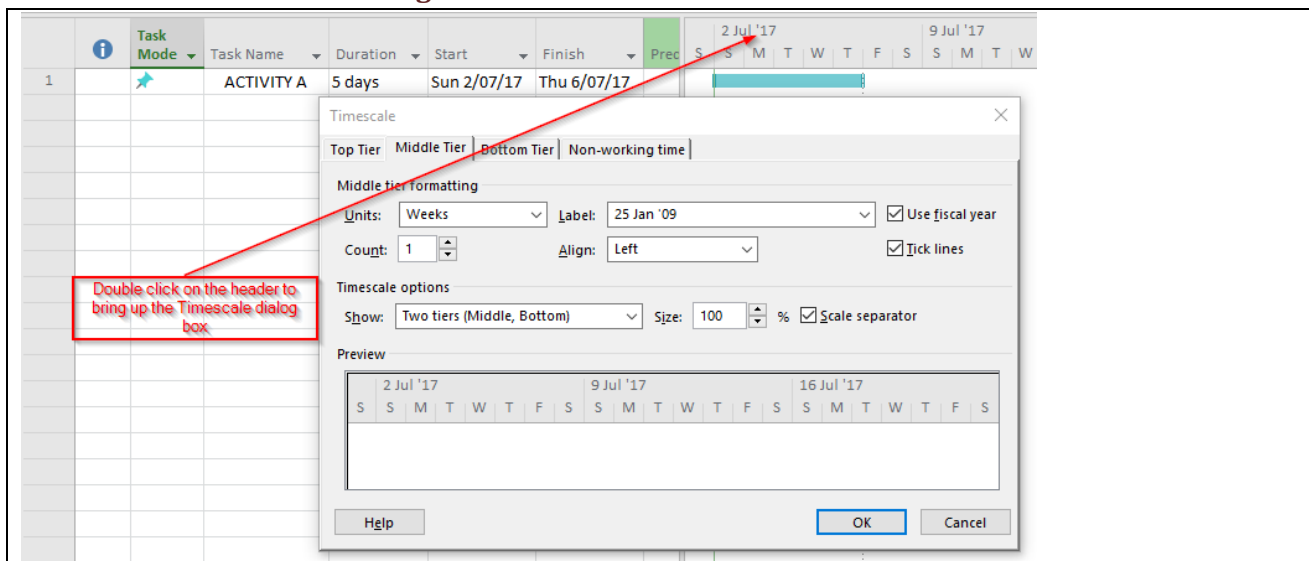
Examine the settings in the **Timescale** window. After finish, click **Cancel** button.

Enter the Resource for ACTIVITY A

A Resource in Microsoft Project is a group of people or machines which work on an activity. An activity can require several resources.

- Double click on the ACTIVITY A row
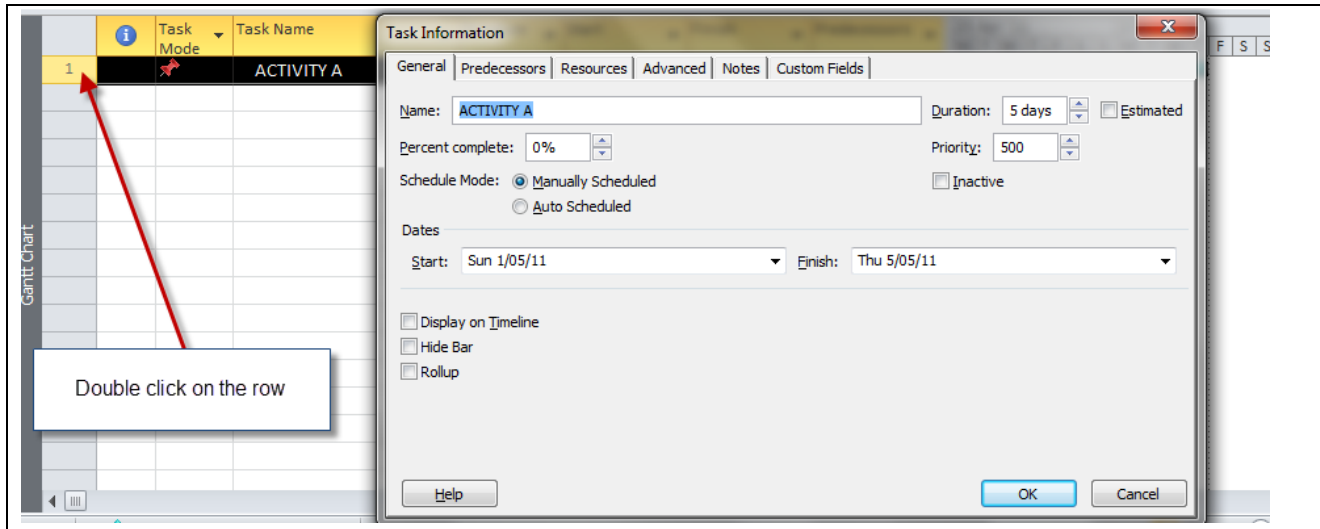
- Examine all tabs in the **Task Information** window

- Click on **Resources** tab

- Enter the following details

RESOURCE NAME	UNITS
W1	100%

- Click **OK** button to save the details

Explanation of work units

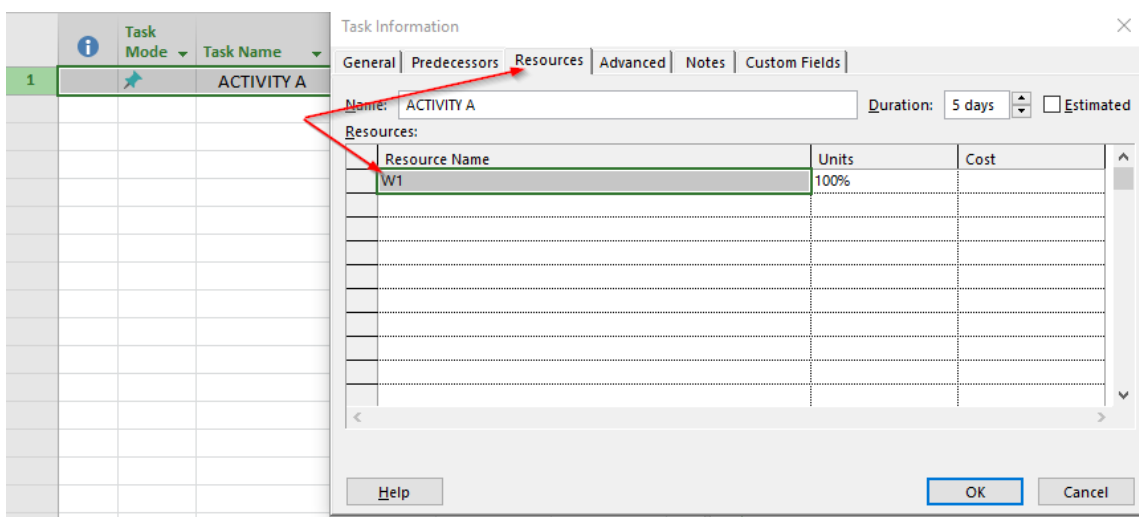Units means the number of units of the resource that must be applied to the task when work is done on the task.

If a task requires more units of a resource than are available then the task is scheduled and the resource is overallocated.

The program user must decide what action to take about overallocated resources.

The work units for a task are set in the task information window.

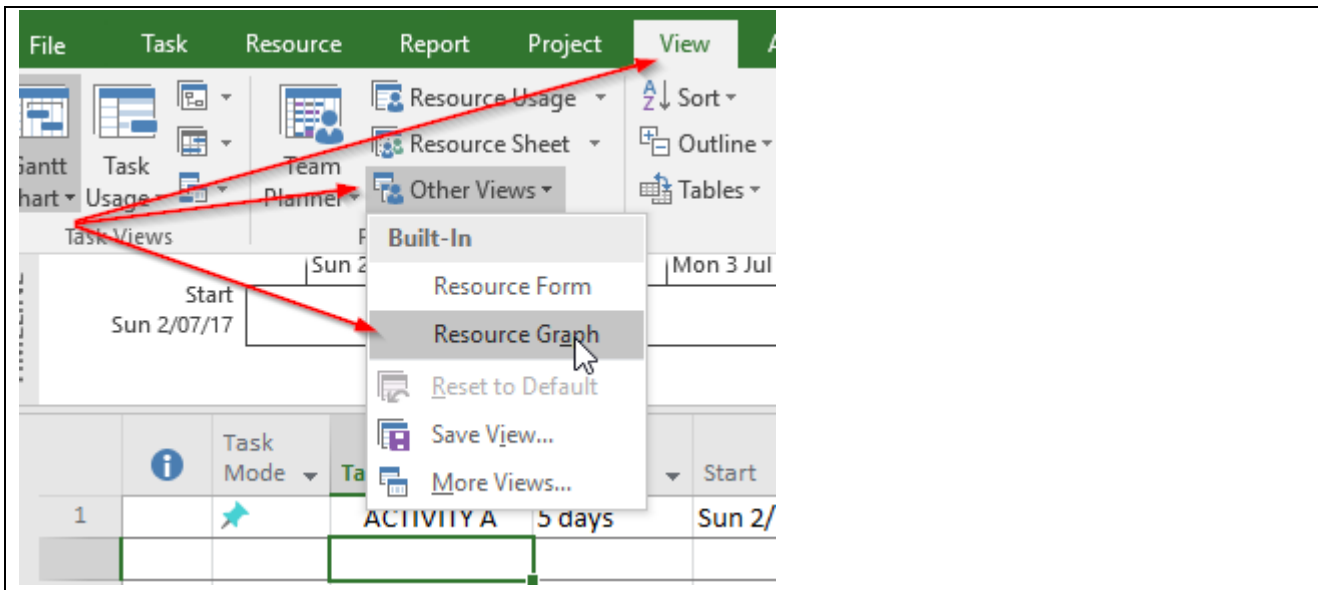### Load and examine the Assign Resources window

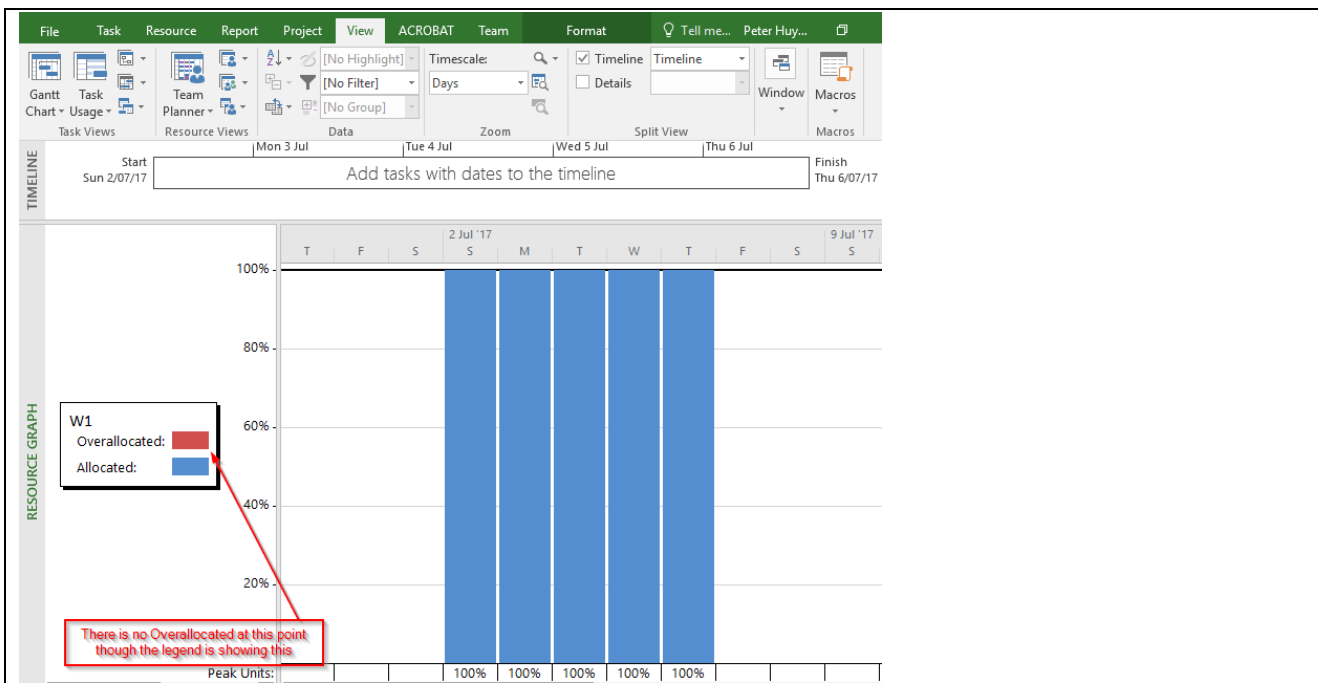- Click on **Resource->Assign Resources**

- Examine the window
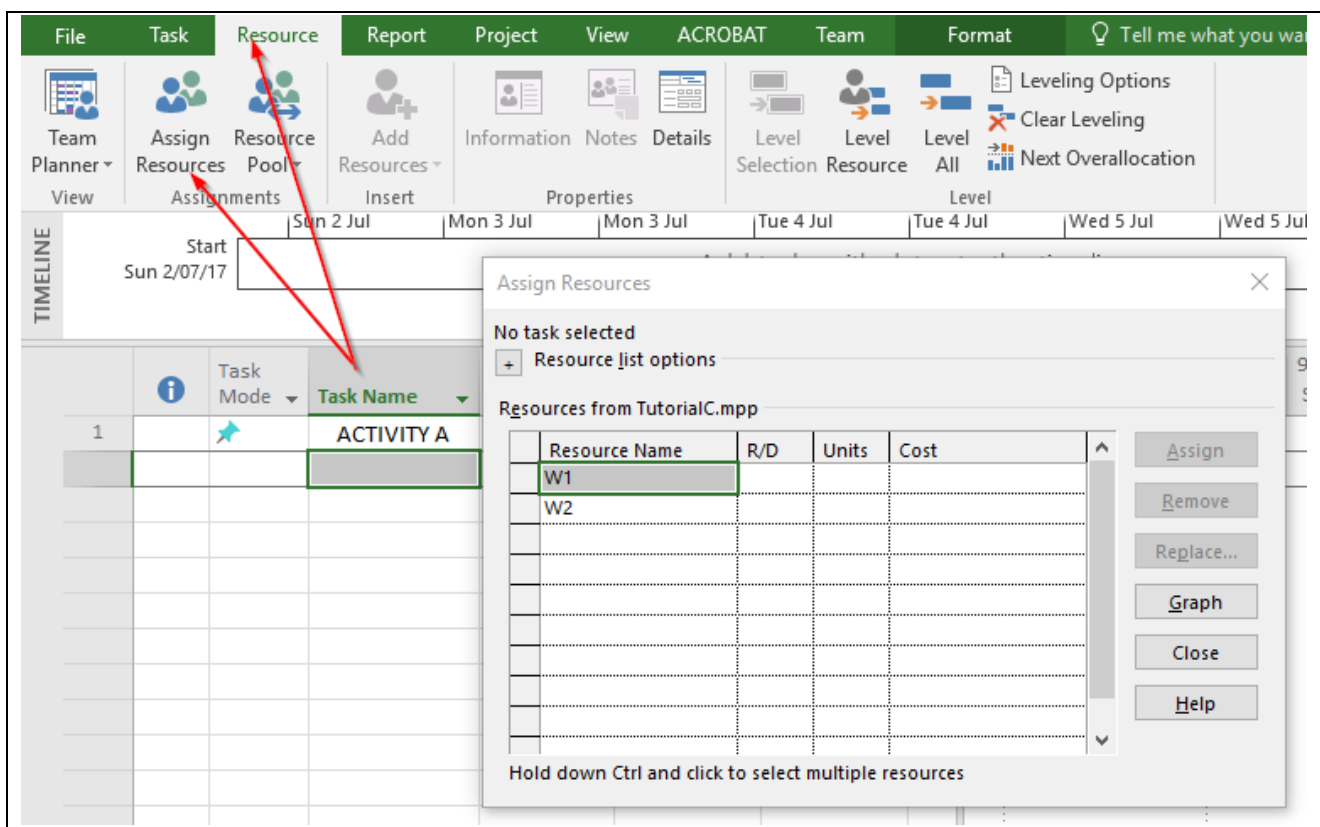
- Click **Close** button after examine.

Load Resource Graph

- Click on **View->Other Views->Resource Graph**

- The following screen will be displayed. If you can't see the bars, then scroll to the left until you see the start date of the project.

Examine Resource Information

- To view the Resource Information for W1, double click on the legend of the graph in the **Resource Graph** window
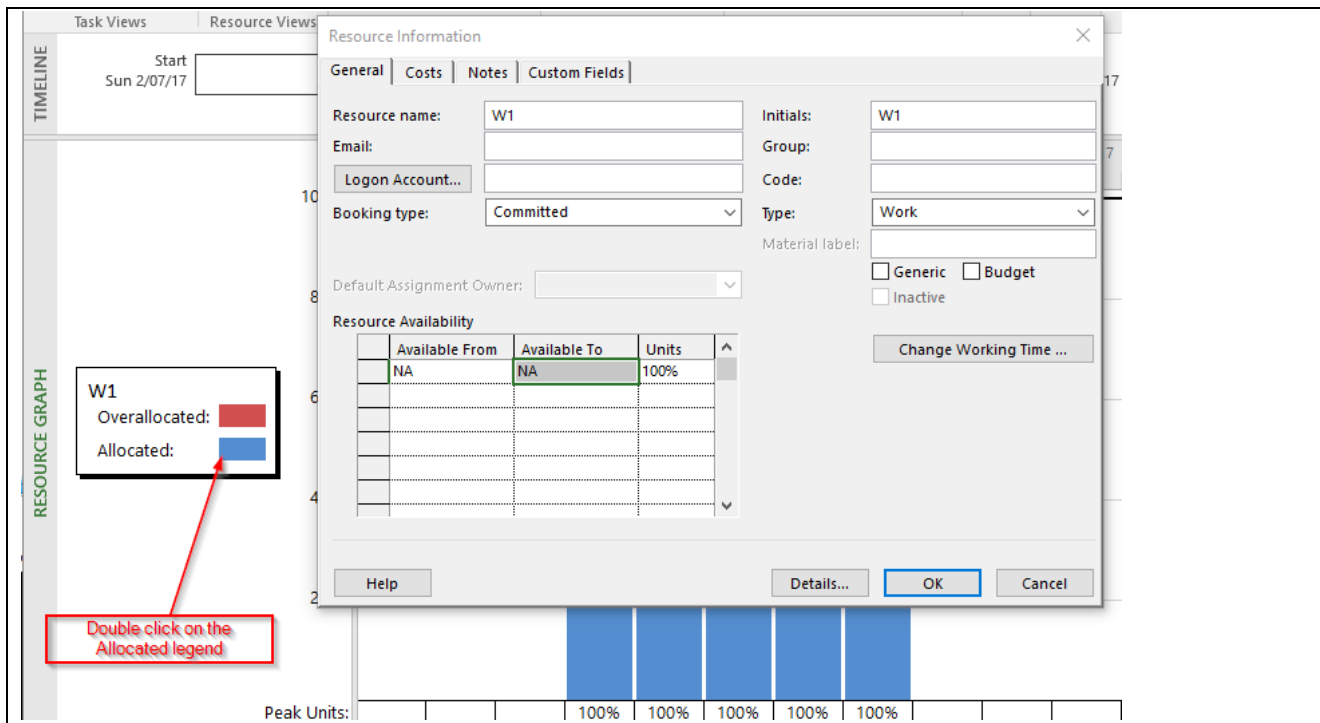
- Click **Cancel** button after examined.

Examine Resource Graph Bar Styles

- Double click anywhere on the graph window of Resource Graph to bring up the Bar Styles window.

- Click **Cancel** button after examined.

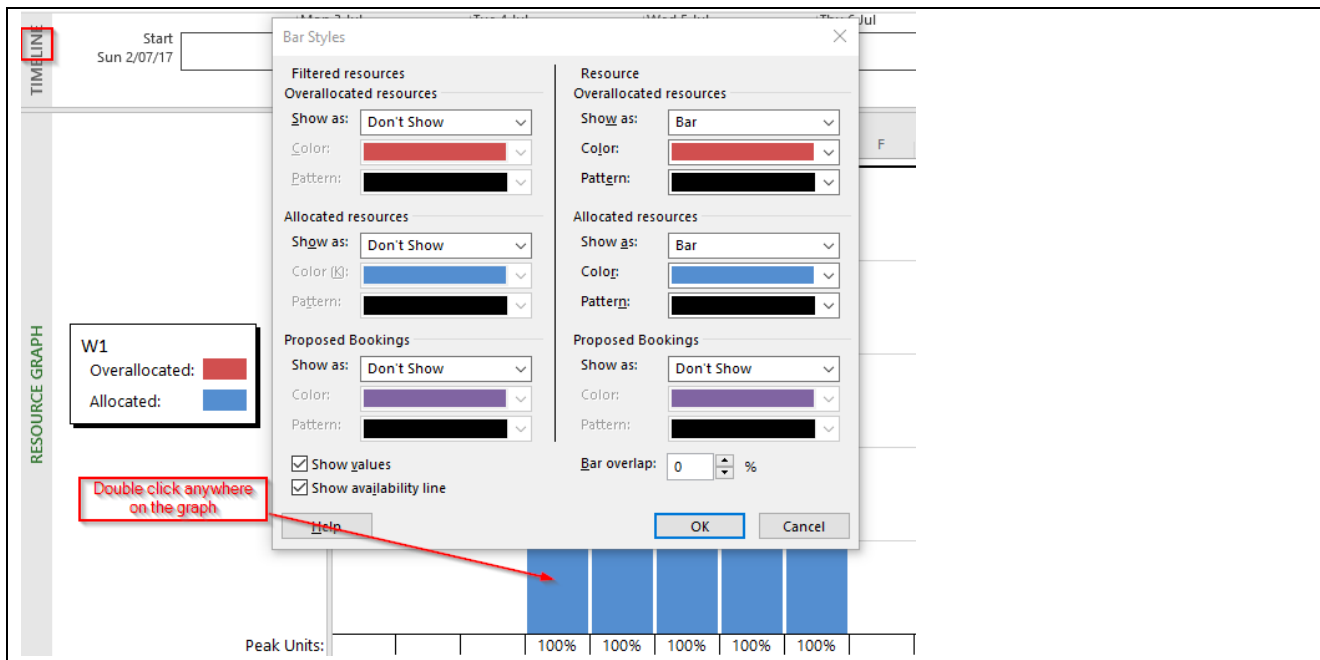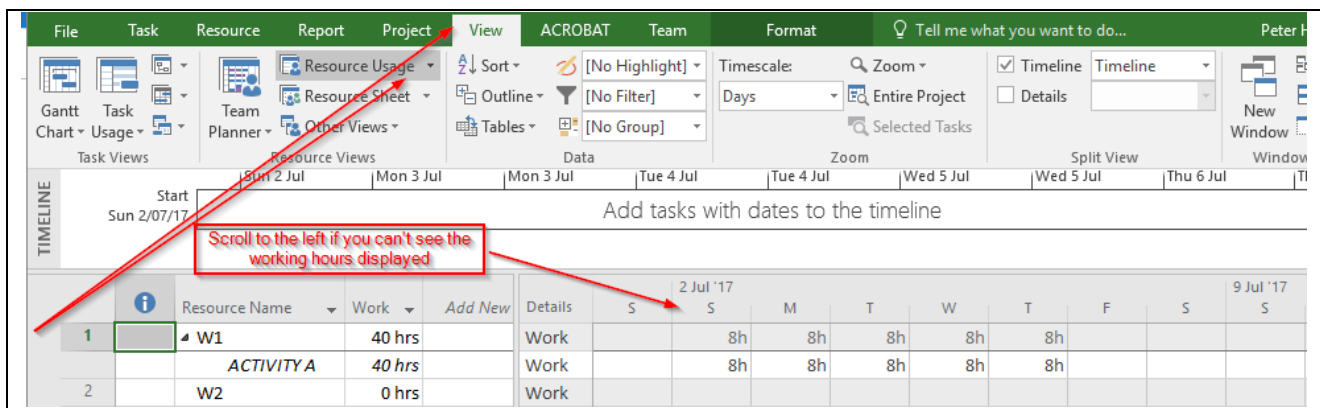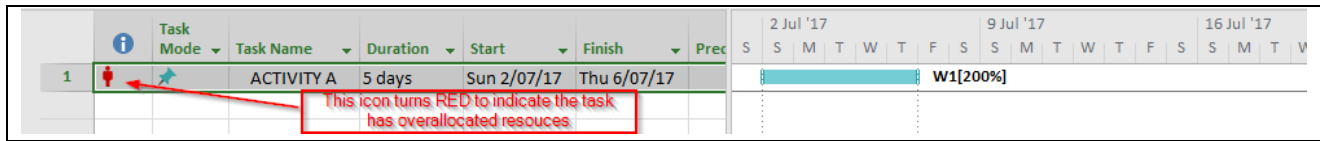## Load Resource Usage Table

Click on **View->Resource Usage**

- Work Details could be turned on or off by right clicking on anywhere on the right hand side and select **Work**, or alternatively

- Click on **Format->Work**

Change the amount of resources applied to ACTIVITY A

- Change the view back to Gantt Chart by clicking on **View->Gantt Chart**

- Double Click on the ACTIVITY A to bring up the **Task Information** window

- Select **Resources** tab in the **Task Information** window

- Change Units to 200%

- Click **OK** button

- Click **Skip** button if another dialog prompts up

Examine Resource Graph after changing the amount of resources applied to ACTIVITY A

- Click on **View->Other Views->Resource Graph**

Note: If more than one resource has been applied to the task then you can load the graph for the next resource by:

- *Pressing down* ↓ *key, or*
- *Pressing Page Down key, or*
- *Moving the mouse pointer to the left side of the window and right click, then click Next Resource.*
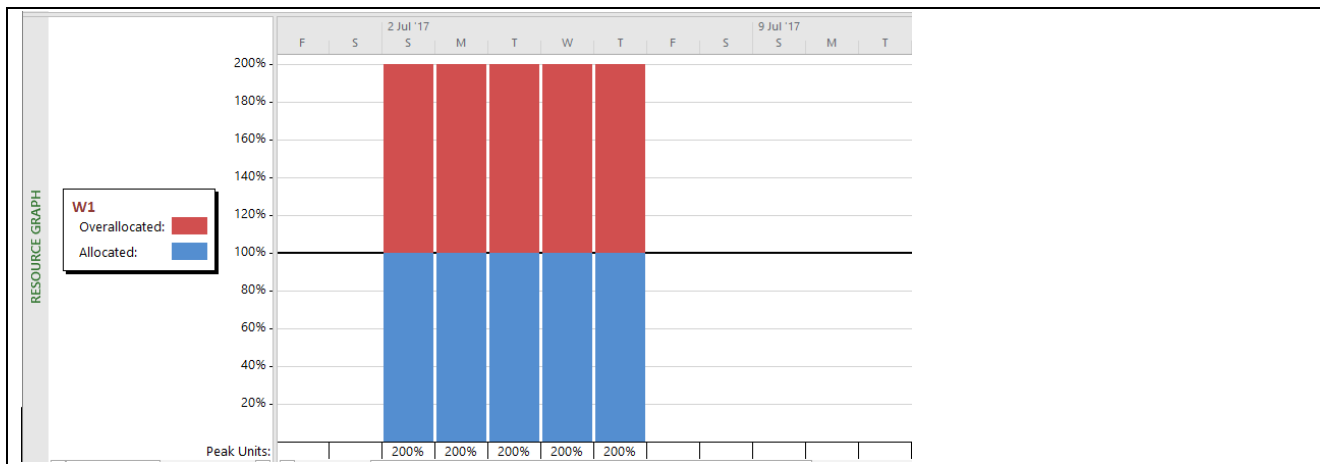
Save the project

- Click on **File->Save**. Follow the prompts and save the project.