Resource Allocation in MS Project

Calendars

The project calendar determines the working days and hours available to your project. In addition each resource can have their unique calendars to mark time off.

Open MS Project and from the Tools menu select Change Working Time...

The following dialogue appears:

In this dialogue you can select one of the existing calendars or create your own based in one of the standard calendars. Each resource has its own calendar derived from the project calendar.

You can mark non-working days such as holidays, etc. The options allow you to define working days and time:
Defining Resources

Before resources can be allocated to tasks, they need to be defined in MS Project. From the View menu select Resource Sheet. Also from the View menu select Table: Entry. The following screen appears:

On this screen you can enter the resource name, or a generic name such as analyst, designer, etc.

The following parameters are used to define the resource:

Type: Work for human resources subject to a rate
Material for materials.

Material Label: The units for material type
Not used for Work type.

Initials: The initial of the resource name.

Group: Used to filter resources by defined categories.
Max. Units: 100% corresponds to a full time resource. More than 100% represents multiple resources, and less than 100% indicates restricted availability, for instance time working in a different project.

Std. Rate: The cost of the resource time, or unit cost for materials.

Ovt. Rate: Overtime rates for Work type.

Cost/Use: Fixed amount for using the resource.

Accrue At: The cost can be accrued at the start of the task, prorated through the duration of the task or at the end of the task.

Base Calendar: The base calendar used to create a specific resource calendar.

Code: Another field used for filtering.

Clicking on the resource opens the Resource Information dialogue:

In the General tab you can define Workgroup information to be used in conjunction with the web or email workgroup options. You can also define the resource availability. This allows you to define the time that the resource will be available to work in the project. This is useful to make changes to the schedule maintaining the integrity of the resource base available to the project.

The Working Time tab allows you to modify the resource specific calendar. The next useful tab is Cost:

Fig 4
Here you can define up to five different rates for the same resource, and also make up to 25 rate modifications for each rate. This is useful to deal with rate increases, salary reviews, etc. Another application of this information is to manage rates for non-resident resources.

By default the A rate is used. We will see how to select a different table later in the tutorial.

**Assigning a resource to a task**

Select Gantt Chart from the View menu. Select Assign Resources... from the Tools menu. The following dialogue appears:

Resources are allocated to tasks by simply dragging them over the selected task. They can be removed by selecting the task, the resource you want to remove and then clicking on the Remove button. By default up to 100% will be allocated, but you can change this for each assignment.

The Replace... button is an easy way to substitute one resource for another in a task.
The final allocation can be reviewed by selecting More Views... Task Usage from the View menu. The following screen appears:

![Resource Allocation and Assignment Information](image)

This screens show the resources assigned to each task and the assignment information. On this screen you can change the Assignment information of a resource by clicking on it. The following dialogue appears:

![Assignment Information Dialogue](image)

Work contour allows you to specify how the time will be distributed over the task duration when scheduling the project. The Cost rate table allows you to specify one of the five different rate tables.

The start and finish dates refer specifically to the assignment, and these dates can be different to the task dates.
Fig 9

The Tracking tab is used to enter tracking information, such as the actual work performed and an estimate to complete. The assignment information is automatically adjusted to reflect changes in any field.

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