



nicholson solutions LTD

Microsoft Project

Resolving resource allocation conflicts and working with split screen

IT skills
tasters



Resource Allocation

Aims

This session enables you to use the resource allocation tools in Microsoft Project to optimise the use of resources in your project plan.

Objectives

- Know how to view resource allocation information
- Understand the options for resource levelling
- Know how to use automatic resource levelling

Resource allocations over time

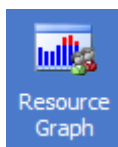
Resource allocation is the effect of your task assignments on the workloads of the project resources, both people and equipment. The aim is to have all resources fully allocated, i.e. they have the same amount of work assigned as they have working hours in the week.

You can view the resource allocations in a number of ways in the **Resource Usage** sheet. By default the table view at the left hand side shows the Usage table. This shows the total work assigned to each resource, and can be expanded to show the tasks or collapsed to show their total work assigned over time. If the name is shown in red with a warning sign, then the resource is over-allocated (see next section).

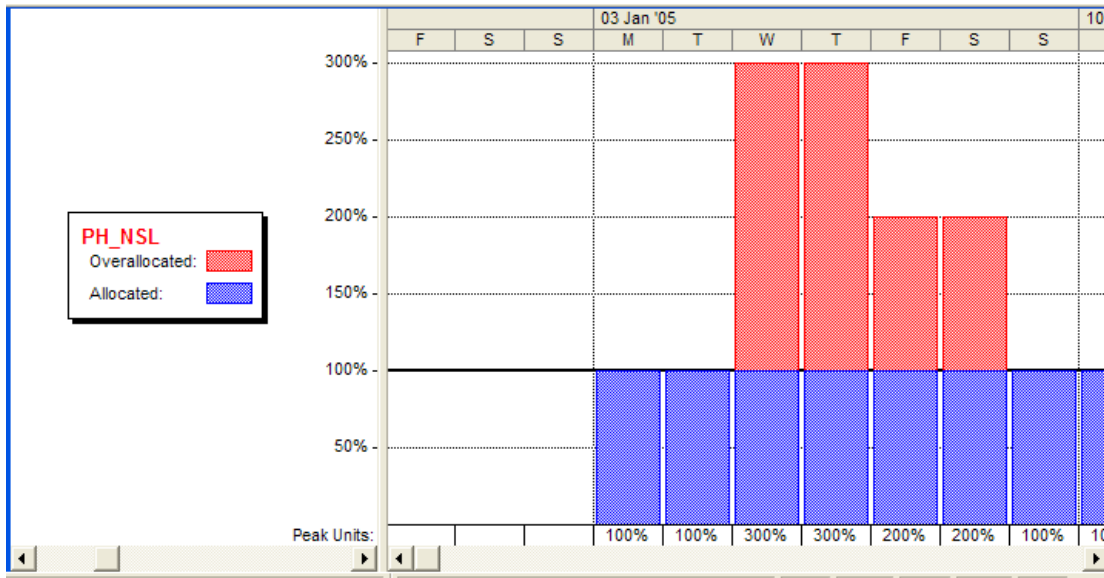
You can alter the timescale of this view to see summary values per month. From the **Format** menu, select **Timescale**. Select the Unit in the Middle Tier as Years, and in the Bottom Tier as Months. On clicking OK the Resource Usage sheet should show monthly totals for each resource across the life of the project.

Levelling over-allocated resources

Over-allocation is when a resource has more work allocated than they have working hours in which to achieve it. It is important for over-allocations to be addressed in order for the project plan to be meaningful.



We have seen how the Resource Usage sheet highlights the name of a resource which is over-allocated, and it also highlights the hours on the days of over-allocation in the grid. The **Resource Graph** view makes over-allocations easy to view. In this view you can page through a graph for each resource by clicking the scroll bar below the resource name. If the resource is over-allocated the name is shown in red, and the graph indicates the day (timescale can be formatted) and the extent of the over-allocation. In the example below, there is a major over-allocation which must be resolved.

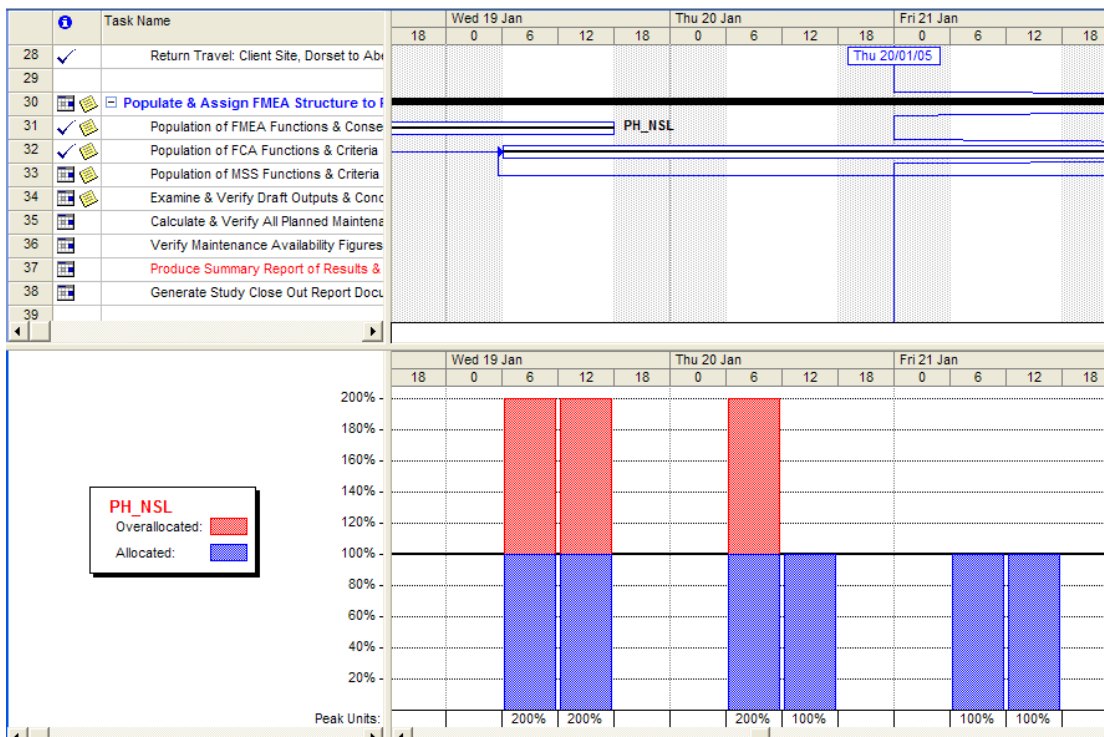


To resolve over-allocation you must delay the start date of a task, or split up the work on the task. Working with a split view showing the Gantt chart and the Resource Graph helps you identify the conflicting tasks in each over-allocation.

Using split screen

In the **Gantt Chart** view select **Window**, then **Split**, and you will see a grey divider in the middle of the screen. The view that shows below the divider is called the **Task Form**, and it gives all the details of the task you have currently selected. If you move to another task, the Task Form refreshes to show the details of the current task.

You can use the split screen to show any pair of views: to resolve over-allocations, click anywhere in the top window and select **Gantt Chart** view, then click in the bottom and select **Resource Graph**.



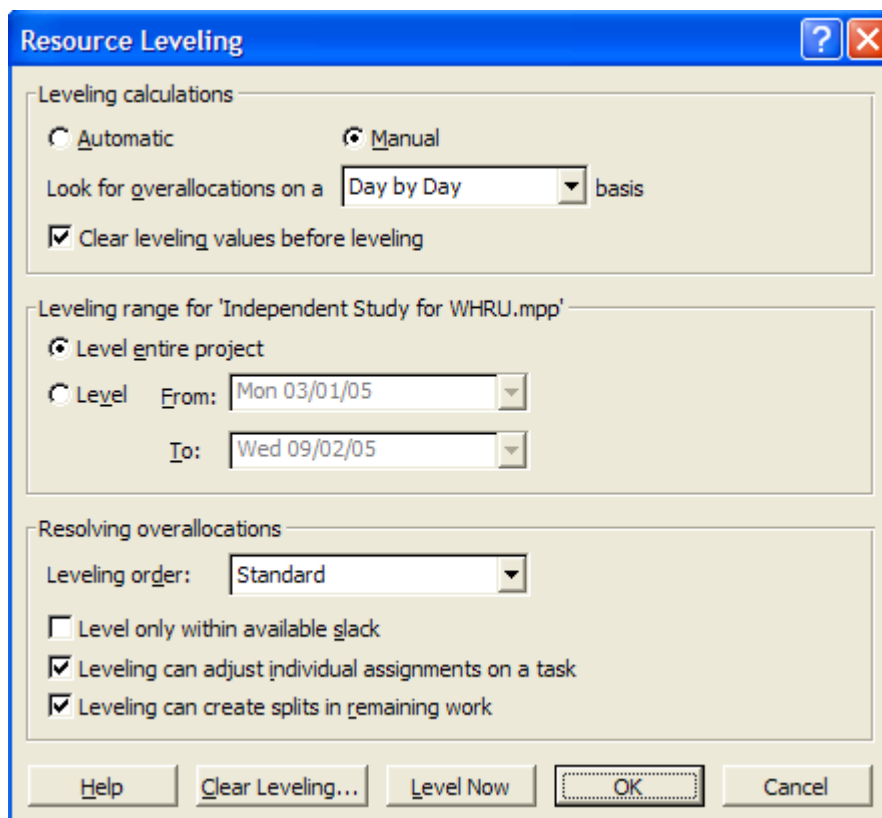
Now when you click on any task in the Gantt, you will see a resource graph for the resources that are assigned to that task, and when you scroll to the place where they are over-allocated, the Gantt chart will show you what tasks are causing the problem on that date.

If you have more than one resource assigned to a task, use the right-arrow beside the Peak Units label to scroll the graph to the next resource.

Automatic resource levelling

Project provides a resource levelling tool, which assists with the task of resolving over-allocations. Decide your parameters before using the tool, for example, can the project end-date slip, or must levelling work within the current project time frame. The tool can delay tasks, split tasks, and adjust resource assignments, and you can dictate which of these are allowed.

Display the Resource Sheet then select **Tools, Level Resources**.



The Automatic or Manual setting determines whether Project levels constantly or only when you decide to. Automatic levelling occurs as soon as a resource becomes over-allocated.

You can be more or less precise about allocation by selecting different time intervals in the next drop-down list: **Look for over-allocations on a ...basis**.

The middle section allows you to specify the scope of the levelling to be done, i.e. the whole project or just a section.

The lower section determines which order Project uses in deciding which task can be delayed to resolve a conflict.

Standard	Take predecessor relationships and task constraints into consideration
ID only	Use task IDs only, with higher numbers delayed before lower ones.
Priority, Standard	Looks at a task's priority value before using standard parameters.

(Tasks can be prioritised in order to favour them in resource reallocation).

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