PROJECT 2013
TECHNICAL TIPS—SCHEDULING RESOURCES AND MAKING REPORTS

Creating a Resource List

1. Click on Resource Sheet.
2. Click on the first cell of the Resource Name column.
3. Type the first resource name.
4. Repeat for each resource.

Adding Wage Rates to the Resource List

1. Go to the Resource Sheet.
2. Click on the first cell of the Std. Rate column.
3. Type the cost of the first labor resource. Type only the number. The cells in this column are already formatted to display the cost as (number)/hr.
4. Repeat for each resource.

Setting Maximum Units

1. Go to the Resource Sheet.
2. Choose a level of effort for a resource (examples: 100% = one person, full time; 50% = one person half time; 300% = three persons full time).
3. Repeat for each resource.

For Non-Work Resources

1. Go to the Resource Sheet.
2. Click on Type.
3. Use pulldown menu to specify material or cost.
4. Set Standard Rate and Cost/Use.

Assigning Resources to Tasks—Method 1

1. Go to the Gantt Chart spreadsheet.
2. Click the cell of the task to which you want to assign resources.
3. Choose Resource Tab.
4. In Assignment box, Click on Assign Resources.
5. Highlight the resource you want to assign to task.
6. If you want to assign more than one person to a task. Hold down the CTRL key while selecting multiple resources.
7. Click on Assign button.
8. Repeat for each task.
Assigning Resources to Tasks--Method 2

1. Go to Gantt Chart spreadsheet.
2. Click the cell of the task to which you want to assign resources.
3. Type the resource names or names.
4. OR use the pull down menu to identify resource to be assigned.
5. Repeat for each task.

Note: Assigning Resources using Method 2 does not work well when assigning multiple resources to a single task. Double check your work so that you do not change the duration of the task you are working on.

Resource Graph

1. Go to Resource Graph on left button bar. The default is the Peak Units View. This shows work as a percentage of a workday, work week, or work month.
2. Notice the screen is split.
3. By scrolling through the left screen you can change which resource you are viewing. The right screen shows the individual loadings (called histograms) for each resource assigned to the project. Resources that appear in red are overallocated (scheduled to work more than a regular workday).

Adjusting the Resource Graph

1. By double clicking on the time scale bar or using the format pull-down menus, you can adjust the picture so that you show the information in a format you want.
2. The Enlarge Box will let you shrink or expand the space between time scale separators. JUST DON’T GET CARRIED AWAY!

Alternative Resource Views

1. By right clicking in the space to the right of the split screen you can see different views of the resource histograms.
2. The most important view for this lab will be the Work View. It shows the number of work hours scheduled per time period.
3. Experiment with other Views. Some detail resource costs per time period or cumulative resource costs.

Resource Usage

1. You can also view resource information by clicking on the Resource Usage button on the left button bar. This will provide information in a spreadsheet format.
2. By adding columns to the spreadsheet you can list information such as Work (the number of hours a resource works) or Cost (what the resource will cost). This added information will be reflected in the resource reports.
**Resource Leveling**

This process requires that you use your judgment!

1. Save entire project. Be prepared to save the project with a different name each time you level the project so that you can make comparisons.
2. View each Resource Graph (Resource names will appear in red when overallocated) to determine if leveling is necessary.
3. Move to a Task View (like a Gantt Chart).
4. If leveling is needed, choose the Resource tab.
5. In Leveling box, Click Leveling Options.
6. Use this setting for leveling for now--Manual, Day by Day, Level entire project, Leveling Order--Standard, Level only within available slack. Do not check the option that allows splitting the task. THIS IS THE MOST CONSERVATIVE LEVELING OPTIONS.
7. Click Level Now.
8. If this does not resolve the overallocation problem, you will see a dialog box asking whether to skip the resource that can not be resolved. Do so.
10. Uncheck the box, Level only within available slack. Experiment with various combinations of checks and unchecks on Leveling can adjust individual assignments on a task and splitting task. This will extend the set length of the project.
11. You can undo leveling immediately after leveling using Edit/Undo Level Resources OR at anytime by going to Tools/Resource Leveling/Clear Leveling. REMEMBER: TO USE LEVELING COMMANDS YOU MUST BE IN A TASK VIEW

**Checking Effect of Leveling**

1. Return to Resource Graph. Overallocation should be gone.
2. You can also add the columns Preleveled Start and Preleveled Finish to your spreadsheet and compare those dates.

**Choosing Reports**

1. Choose Report tab
2. In View Reports box, you have a variety of pre-designed report options, including various Dashboards, Resource Reports, Costs Reports, and Reports reflecting activities In Progress. For Lab 1 you will be most interested in some of the Dashboards and some of the Cost Reports
3. You will find a menu-driven set of choices for reports.
4. Select the category of desired report.
5. Select the type of report within a category.
6. Check to see if it contains the information you desire.
7. Editing the Field list allows you to change the time intervals (quarters, months, weeks, etc.) and generally to add or customize information included.

Tutorial

Another option on the report tab is some Getting Started options if you want to delve into some aspects of Project 2013 beyond these starting Tip Sheets. These options include both “help” functions and videos for more information.

Reminders--Style/Interpretation Tips:

1. Introduce Lab problem before beginning.
2. Respond appropriately to memo.
3. Identify all output in a clear way, in case a page of output is separated from the report.
4. Introduce all output and explain why it is included. Interpret the output. Explain what is important. This is the “meat” of your report and should carry the weight of your argument.
5. Make informed choices about headers and footers.
6. Include a legend on all output.
7. Make informed choices about what information you include.
8. Avoid crowding information on output.
9. Don’t assume Raymond understands or remembers anything he asked for.
10. Don’t assume that Raymond will be the only one to see the report or part of the report.
11. Think like a manager/consultant.
12. SAVE OFTEN.