

**Learn from MVP : Resource Optimization in Microsoft Project**

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Resource Workload

- Project schedules work to (work) resource based on the working time defined in their calendar.
- Resource Workload can be seen through Task Usage and Resource Usage views

Resource Work Availability Report

- Use this report to view a bar graph with total capacity, work, and remaining availability for work resources
- Click Project tab, click Visual Reports in Reports group.
- On the Visual Reports dialog, click Resource Usage and choose Resource Work Availability Report



Workload Leveling

- Project schedules the work for a resource based on his calendar but not based on availability
- Scenarios for resource overallocations
  1. Resource total work on a task is more than availability
  2. Resource is assigned work outside his availability
  3. Resource is working full time on two or more parallel tasks
- Workload Leveling is a process of resolving the overallocations with the goal of making the **forecast realistic**

Resource Leveling	Resource Smoothing
Start and finish are adjusted based on the resource constraints	Adjust start and finish such that the resource requirements doesn't exceed predefined resource limits
This technique can often cause the original critical path to change, usually to increase	In this technique the critical path is not changed and project finish date is not delayed.

Spot overallocations

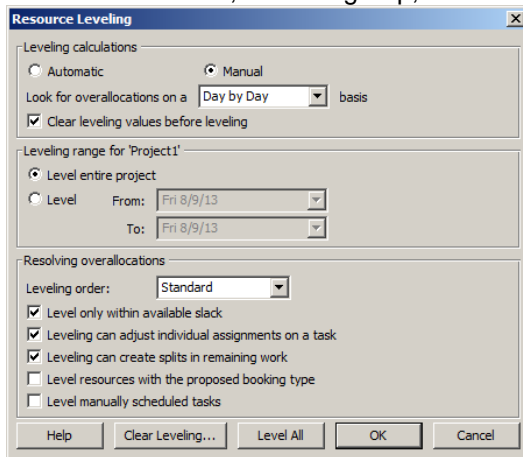
Gantt Chart view	Resource Graph	Team Planner view
On any task related view, you can see only few  icons in Indicators column	Click View tab, in Resource Views group, click Other Views dropdown and click Resource Graph	Click View tab, in Resource Views group, click Team Planner

Level workloads yourself

- Add/Remove/Replace resources
- Split long tasks into many shorter ones
- Customize resource calendar
- Delay task start date/assignment start date

## Level workloads by Project

- Click Resource tab, in Level group, click Leveling Options.



- These options will affect only work resources.
- The Leveling calculations trigger an automatic leveling or manual leveling
- Leveling range for ...
  - Select Level entire project to level workloads across the project
  - Select Level From: ... To ... to level workloads within the specified period
- Leveling order
  - Select ID Only to level tasks based on their ID numbers
  - Select Standard to level tasks based on their slack
  - Select Priority, Standard to level task priority and slack
- Resolving overallocations
  - Select Level only within available slack to solve as many overallocations as possible but still meeting the target date
  - Select Leveling can adjust individual assignments on a task to schedule assignments individually instead of a group
  - Select Leveling can create splits in remaining work to split task bars but tasks become fragmented
- Options to start leveling
  - Level All : If Leveling calculations is set to Manual, this button triggers a one-time leveling of workloads
  - Level Selection : Resolves resource conflicts of the selected tasks by delaying/splitting them based on Leveling options
  - Level Resource: Resolves resource conflicts of the selected resource by delaying/splitting them based on the Leveling options