

## CWDS SM Procedure 104 – Resource Leveling

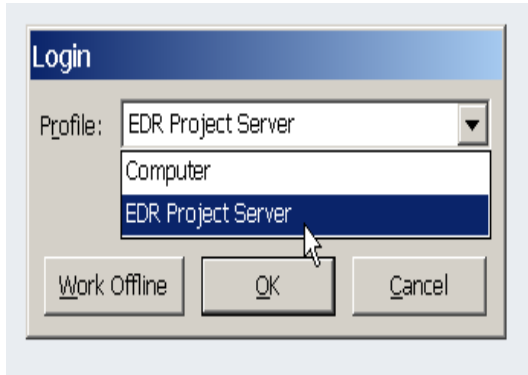
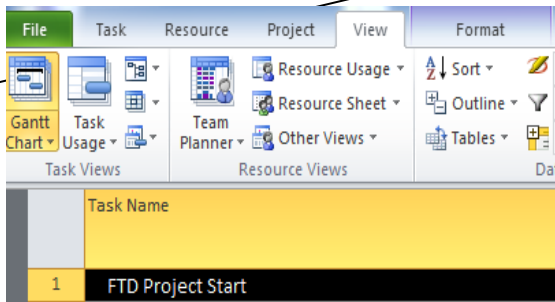
Audience: CWDS Schedule Manager  
Frequency: Every Status Week  
Last Updated: 4/20/2016

After reading this you will be able to understand the procedure used to level resources in the Master Schedule. Resource leveling is conducted on a monthly basis for the current phase of the project.

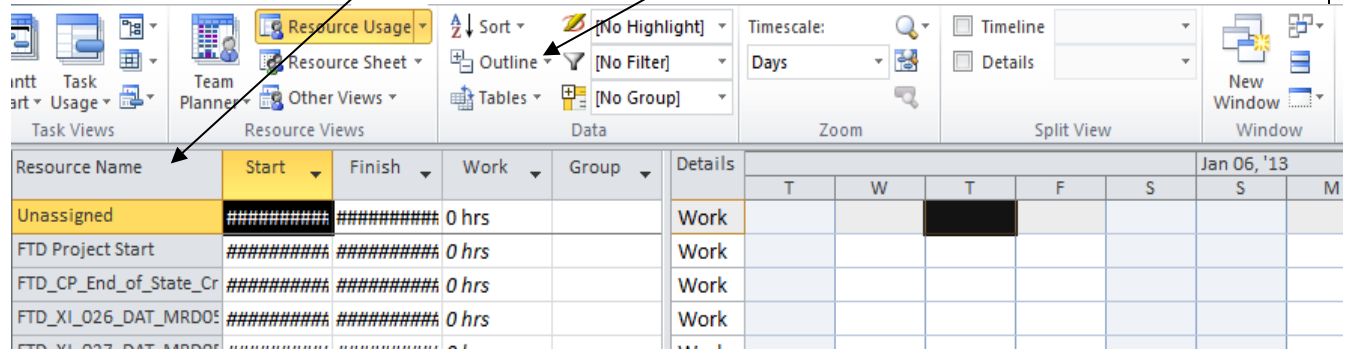
### Prerequisites:

- MS Project Professional

**Views Used:** S\_Resource Leveling Analysis

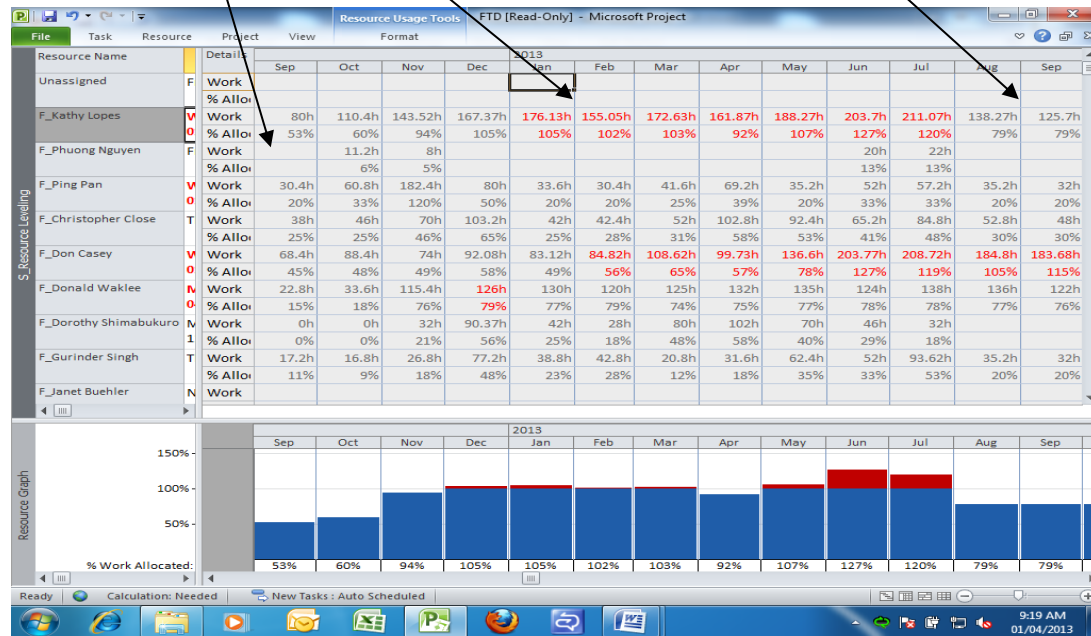
Step	Description
1.	<p>If working on MS Project Enterprise Server: Open MS Project and connect to MS Project Server. Note: Do not connect to the Local Computer profile.</p> 
2.	<p>If you are not working on MS Project Enterprise Server, copy the schedule from the network folder to your desktop.</p>
3.	<p>Open the schedules in read write mode</p>
4.	<p>On the View Tab, select the Other Views dropdown, and then click on More Views.</p> 
5.	<p>Apply the S_Resource Leveling Analysis view</p>

6. Click on the Resource Name column, then click on the Outline icon and then select "Hide All Subtasks"



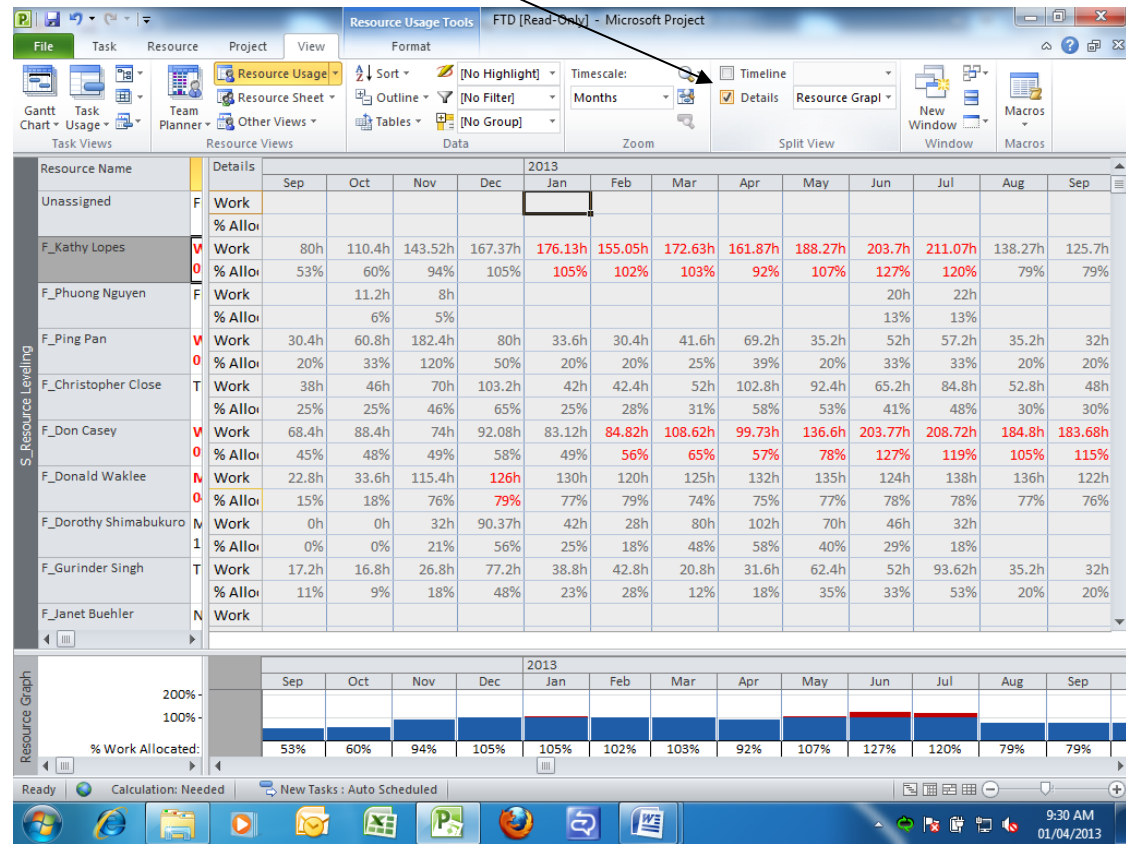
Adjust the column widths as necessary.  
Press Ctrl-F1 to collapse the ribbon

7. Then verify that the Resource Leveling Analysis view is displaying  
The % Allocation, Year in the Time Phase Mid-Tier, Month in the Time Phase Bottom Tier



8. Determine if any resources are over-allocated (greater than 120% allocation). Note: the target allocation percentage is between 70% - 100%.
9. If resource over-allocations exist then first adjust Level of Effort tasks that are in the schedule
10. If adjusting the Level of Effort tasks is not sufficient, then individually adjust the tasks to remove the over-allocation or remove the resource from some tasks. This is done in conjunction with the State Task Lead.
11. View the resource usage again to see if there are substantial resource under-allocations (Less than 80% allocation).
12. If resource under-allocation exists, then adjust the Level of Effort tasks as required.
13. If a simple change to an Level of Effort task is not sufficient to mitigate the under allocation, then meet with the Team Lead to either assign the resource to additional tasks or update the % allocation per task.

14. When finished, press Ctrl-F1 to expose the ribbon, click on Gantt Chart, then un-check the Details box.



15. Return to Gantt Chart view

16.	Save the schedule
17.	Copy the schedule to the correct network folder
	End of procedure