Resource Utilization - Power BI

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Your browser does not support HTML5 video.

Project Management Context

Managing resources effectively is fundamental to project success as it helps in controlling costs, optimizing productivity, minimizing risks, ensuring quality, maintaining timelines, and satisfying stakeholders.

Effective resource management is a key competency for project managers and requires careful planning, coordination, and monitoring throughout the project lifecycle.

In addition to Work Allocation reports, BrightWork 365 also offers a **Resource Utilization Power BI Dashboard**, allowing users to view all the project task assignments across projects, and assess levels of resource utilization. The dashboard allows viewers to quickly determine whether a resource is under or over allocated with project tasks.

> **Tip** The report pages are set to fit on the page. If you have a large monitor, this can lead to extra white space on the side margins of the report. Click **F11** on your keyboard to reduce this effect by opening the report in Full Screen Mode. Click **F11** again to return to the normal view.

Resource Utilization

Week	Mar-03-24 to Mar-09-24			Mar-10-24 to Mar-16-24			Mar-17-24 to Mar-23-24			Mar-24-24 to Mar-30-24			Mar-31-24 to Apr-06-24			Apr-07-24 to Apr-13-24			Apr-14-24 to Apr-20-24			Total		
Full Name	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc	Avail	Assign	Alloc
Alan Morgan	32		0.0%	40	8	20.0%	40	12	30.0%	40		0.0%	40		0.0%	40		0.0%	8		0.0%	240	20	8.3%
Alex Hankin	32	35	110.0%	48	34	70.0%	48	35	73.8%	48	21	43.8%	48	45	93.8%	48	89	185.4%	16	24	150.0%	288	283	98.3%
Anne Wallace	32	32	100.0%	48	56	116.7%	48	50	104.2%	48	50	104.2%	48	58	120.8%	48	26	54.2%	16	8	50.0%	288	280	97.2%
Billy Guinan	32		0.0%	40		0.0%	40		0.0%	40		0.0%	40		0.0%	40		0.0%	8		0.0%	240		0.0%
Christine Chang	32	32	100.0%	48	8	16.7%	48		0.0%	48		0.0%	48		0.0%	48	32	66.7%	16	8	50.0%	288	80	27.8%
Dan Bacon	32	48	150.0%	48	84	175.0%	48	94	195.8%	48	122	254.2%	48	10	20.8%	48	18	37.5%	16		0.0%	288	376	130.6%
Éamonn McGu...	32		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	48		0.0%	16		0.0%	288		0.0%
Jim Corbin	32	16	50.0%	48	32	66.7%	48	40	83.3%	48	40	83.3%	48	120	250.0%	48	64	133.3%	16	8	50.0%	288	320	111.1%
John Huber	32		0.0%	40		0.0%	40		0.0%	40		0.0%	40		0.0%	40		0.0%	8		0.0%	240		0.0%
Jonathan Weis...	32		0.0%	40		0.0%	40		0.0%	40		0.0%	40		0.0%	40		0.0%	8		0.0%	240		0.0%
Julie Batista	32		0.0%	40		0.0%	40		0.0%	40		0.0%	40		0.0%	40		0.0%	8		0.0%	240		0.0%
Sean O'Shea	32		0.0%	48		0.0%	48		0.0%	48	8	16.7%	48		0.0%	48	32	66.7%	16	8	50.0%	288	48	16.7%
Total	384	163	42.5%	536	222	41.3%	536	231	43.2%	536	241	45.0%	536	233	43.5%	536	261	48.7%	152	56	36.8%	3216	1407	43.8%

Unallocated   **Underallocated**   **Fully allocated**   **Overallocated**

Avail = Hours Available   **Assign = Hours Assigned**   **Alloc = Percentage Allocated**

Click F11 on your keyboard
(Control-Command-F on a Mac)
for a better report view

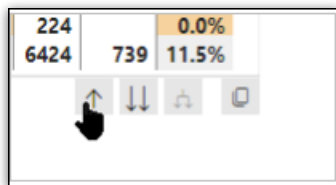How to Use this Report

Date Range

Next 6 Weeks

3/5/2024 - 4/15/2024

By default, the Resource Utilization page shows you how much scheduled work each resource is assigned over the next 6 weeks and what their current capacity is.

Each resource is assumed to have 8 hours availability per working day. Multiple this by the number of working days specified in Admin Area > Global Settings, and you will get the typical resource availability for a given week, i.e., 8 x 5 = 40 hours. If a resource is working on a project with a longer working week, then their availability will increase.

The default time grouping is weeks. You can drill up to months or down to days, using the drill buttons in the bottom right of the visual - hover over the main visual to make the buttons appear.

224		0.0%
6424	739	11.5%

Legend

The legend provides a definition of the color-coding present throughout the Main Window, making it easier for users to understand the data they're viewing.

Date Range & Filters

Use the Date Range and Filter options to further refine the scope of the Resource Utilization content.

Resource Dashboard
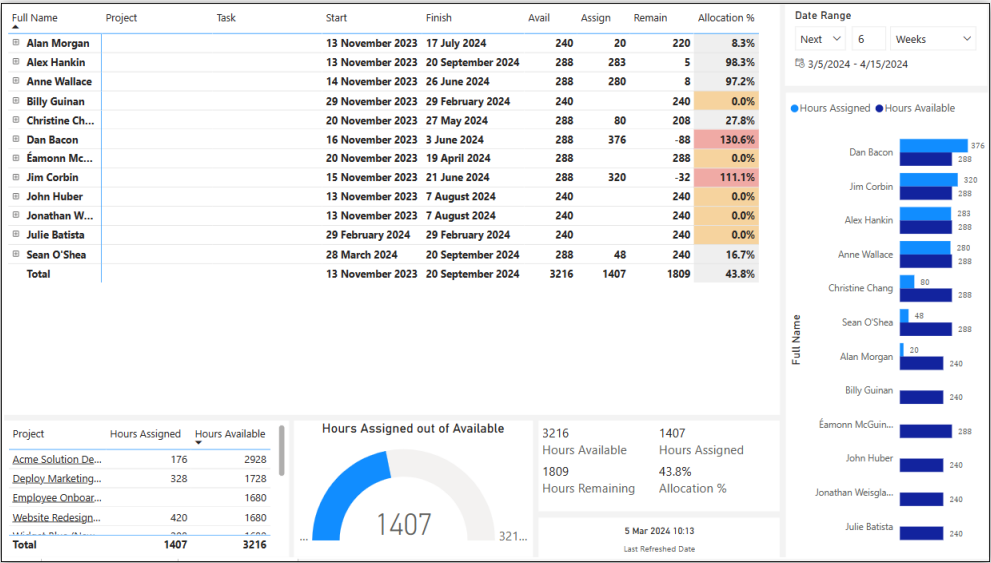
The Resource Dashboard page gives you a more detailed view of what scheduled work each resource is assigned and allows you to focus on one or more individuals to understand why they are over or under resourced.

Click on a user's name on the resource bar chart on the right to focus on this user. Use Ctrl-click to focus on two or more users.

Right-click on a user's name in the main visual and click **Expand | All** to see all the scheduled work that the user is assigned.

Date Range & Filters

Use the Date Range and Filter options to further refine the scope of the Resource Dashboard content.

Project Calendars

Date	5 Mar 2024	6 Mar 2024	7 Mar 2024	8 Mar 2024	9 Mar 2024	10 Mar 2024	11 Mar 2024	12 Mar 2024	13 Mar 2024	14 Mar 2024	15 Mar 2024	16 Mar
Project Name	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturc
Acme Solution Deployment (Project St...	Working Day	Working Day	Working Day	Working Day	Weekend	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Week
AdventureWorks Office Move (Project ...	Working Day	Working Day	Working Day	Working Day	Weekend	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Week
Blue Yonder Solution Deployment (Pro...	Working Day	Working Day	Working Day	Working Day	Weekend	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Week
Deploy Marketing Automation (Project...	Working Day	Working Day	Working Day	Working Day	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Working Day	Week
Employee Onboarding (Project Lite De...	Working Day	Working Day	Working Day	Working Day	Weekend	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Week
Fabrikam Solution Deployment (Projec...	Working Day	Working Day	Working Day	Working Day	Weekend	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Week
Social Media Campaign (Project Stand...	Working Day	Working Day	Working Day	Working Day	Weekend	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Week
Website Redesign (Project Standard)	Working Day	Working Day	Working Day	Working Day	Weekend	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Week
Widget Blue (New Product Introduction)	Working Day	Working Day	Working Day	Working Day	Weekend	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Week
Widget Blue Accessories	Working Day	Working Day	Working Day	Working Day	Weekend	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Week
Widget Green Update (Product Update)	Working Day	Working Day	Working Day	Working Day	Weekend	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Week
Wingtip Toys Website Launch	Working Day	Working Day	Working Day	Working Day	Weekend	Weekend	Working Day	Working Day	Working Day	Working Day	Working Day	Week

Day Type
Weekend
Working Day

Date Range
Next 6 Weeks
3/5/2024 - 4/15/2024

The Project Calendars page shows you each project's calendar. This page is particularly useful if you have a project that has a working week that is different than the global setting or has project exception days.

There are two types of Project Exception Days:
- Working Day: Use this to cancel a Non-Working Day.
- Non-Working Day: Use this to make a working day for a particular project into a non-working day.

Date Range & Filters

Use the Date Range and Filter options to further refine the scope of the Project Calendars content.

Resource Utilization Adjustment Process

When adjusting resourcing, the Project Manager can launch the resource report in the Power BI service and download the related PBIX file to open the new resource report in **Power BI Desktop**. They can then make assignment adjustments in the BrightWork 365 app and view the effects of these changes in realtime using Power BI Desktop, which allows unlimited refreshes of the report data unlike other methods of using Power BI which

have limited daily refreshes. This cycle of **Adjust in the app > View in Power BI Desktop > Adjust in the app**, can be repeated as often as necessary to balance resource workloads. Below are details for using the Resource Utilization Adjustment Process.

Open in Power BI
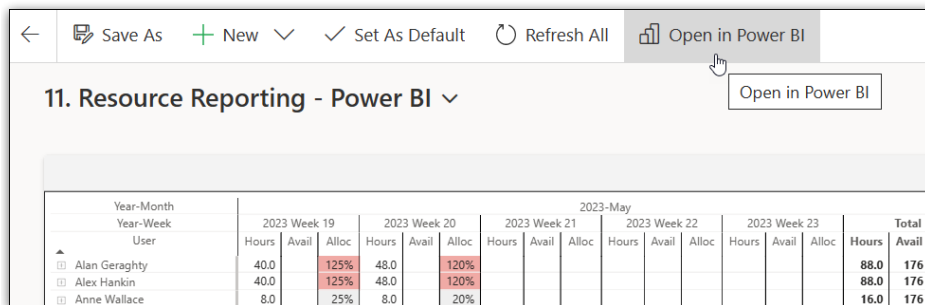
The **Open in Power BI** link will open the report in the Power BI Service, displaying the report in a separate webpage.

Download the Report PBIX File

> **Tip** Power BI Desktop is a free download from Microsoft.

> **Note**
> - Users require **Contributor** permission in the relevant Power BI workspace to download the PBIX file.
> - When users with **Contributor** permission access the **Power BI My Work Dashboard**, instead of only seeing their own work, they will see all users' work.

> **Caution** When using Power BI Desktop for resource utilization purposes be sure not to publish the report as this will affect all users of the report.

One of the added functions provided by the Power BI Service is the ability to download the PBIX file that is associated with the report, which can then be opened in Power BI Desktop. To download the file from the Power BI Service:

1. Click **File > Download this file**.
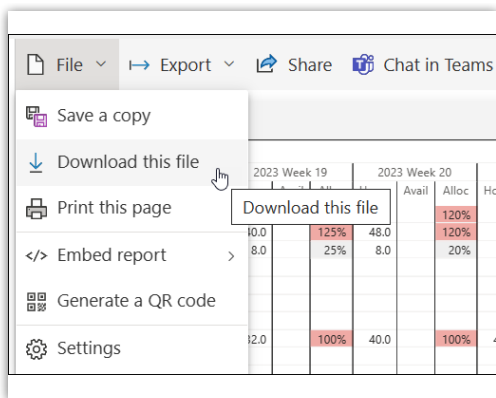
2. Choose to download a copy of your report and data.
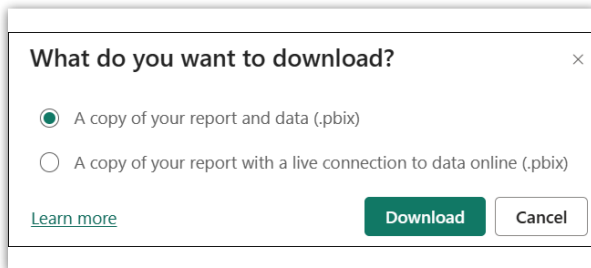
Open the PBIX File in Power BI Desktop

1. When the file download initiated above is complete, open the PBIX file in Power BI Desktop.
2. View the data in Power BI Desktop and choose to refresh the data as necessary using the Refresh option.

> **Tip** If values are missing for columns **Hour** and **Alloc** in Power BI Desktop when all rows are collapsed, expand any row and the missing values will be displayed.