

Overview

This Job Aid defines the steps to follow when identifying overallocation and allocation variance of resources across projects in Sensei IQ.

Work resources have defined availability and may have their time scheduled by a line manager in your organization. When line managers process the resource requests from project managers, it may result in some resources being overallocated. In this situation, the amount of committed work across all projects exceeds the resource's overall capacity for the requested periods and should have some of their work either reallocated to someone else or to another period when the resource has more availability.

Depending on your organizational rules, line managers are typically required to review the resource availability before approving the resource commitments across approved projects. Additionally, it is also equally important to monitor the variance between the committed work from resource requests recorded in the resource plan and the assigned project work from the tasks in the project plan (also referred to as **schedule**) as part of your project governance. This process allows your organization to make sure that the workload of resources is balanced appropriately.

Important: In Sensei IQ, **resource availability** is the difference between the overall resource capacity (based on the resource calendar and target utilization) and approved resource requests (i.e., *committed work in the resource plan*), **not** assignments (i.e., *work assigned to tasks in the project plan*). Unless the default setting is customized in your organization's Sensei IQ solution, the default range of past horizon and future horizon for the calculation of capacity for bookable resources is set to twelve (12) calendar months (past capacity) and thirty-six (36) calendar months (future capacity) from the current period due to Dataverse database quota implications.

When you need to determine if your resources are overallocated (or sometimes referred to as **overbooked**) and/or if your resources are being allocated to tasks across project plans that do not have a corresponding approved resource request (referred to as **allocation variance**), you can easily identify resource overallocation and allocation variance in the following ways:

1. **Identify resource overallocation using the Availability Heatmap**
2. **Identify resource overallocation from the Resource Demand screen**
3. **Identify resource overallocation from Insights**
4. **Identify resource overallocation from the Allocation tab**
5. **Identify resource overallocation from the Resource Plan tab**
6. **Identify resource overallocation from the Resource View**
7. **Identify resource allocation variance from Insights**

Once the resource overallocation is identified, you can resolve, if not minimize, the overallocation in agreement with the respective project managers by following the steps outlined in section **3. Modify an existing fulfilled request for named resources** from a related downloadable titled [JOB AID - Reviewing and approving resource requests](#).

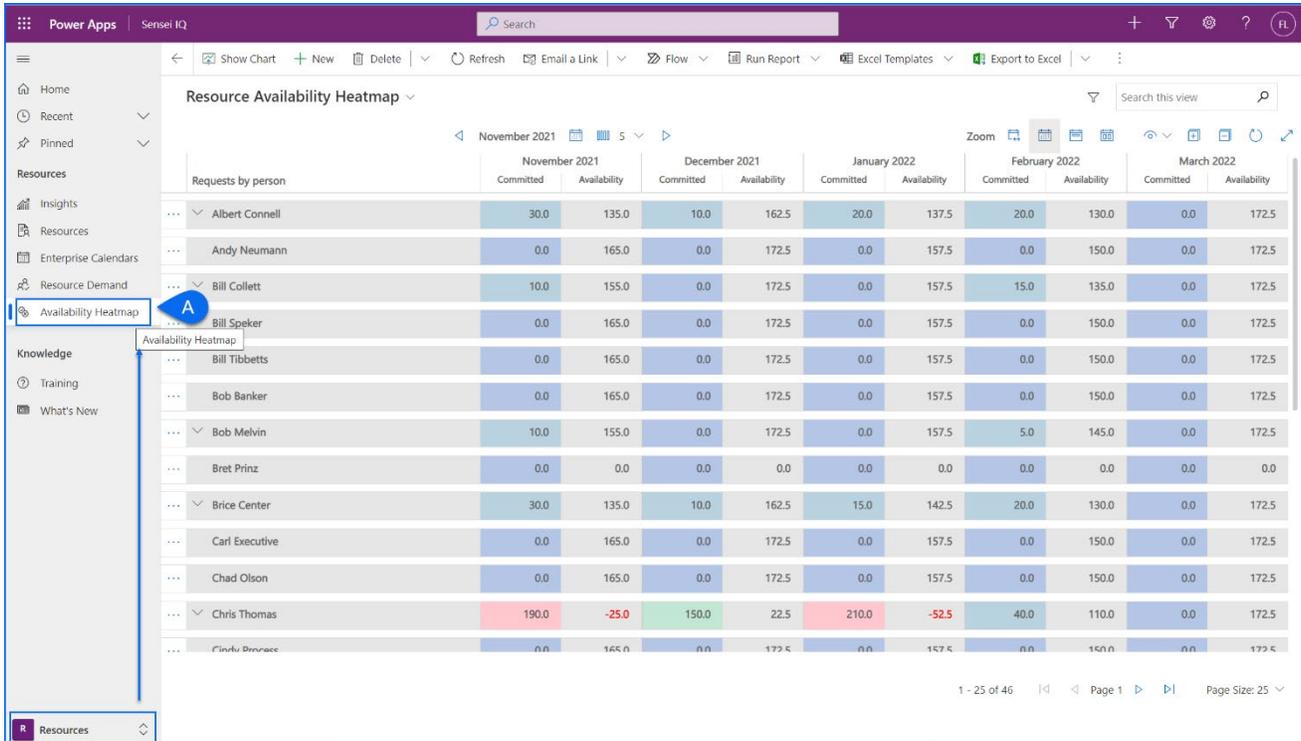
If there is a significant variance in the resource allocation between the resource plan (*committed work*) and the project plan (*work assignments*), the project manager will have to work to optimize the schedule, cut scope, or negotiate for

additional resources or changed dates to remain aligned to the committed work approved by the respective line managers.

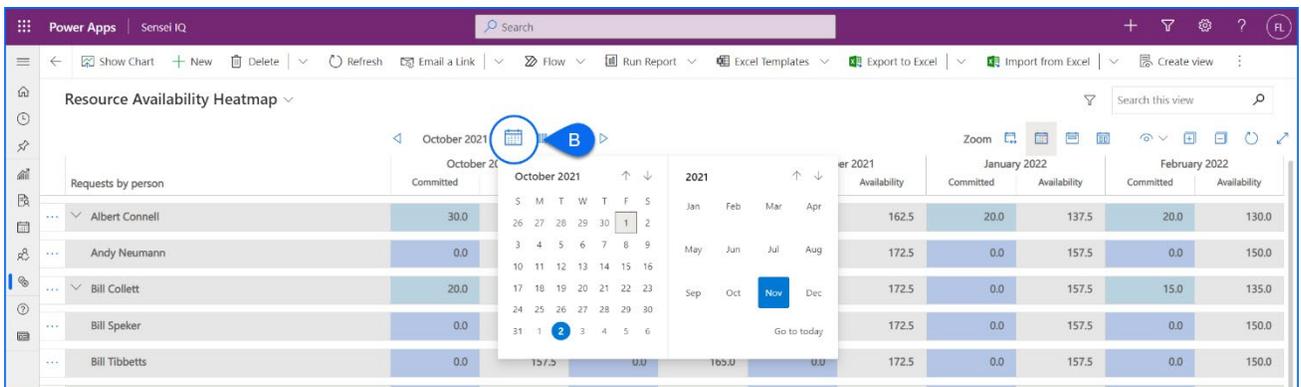
Identify resource overallocation using the Availability Heatmap

1. SET THE RESOURCE AVAILABILITY HORIZON

a. Ensure that you are in the **Resources** area and click **Availability Heatmap** in the **Resources** section.

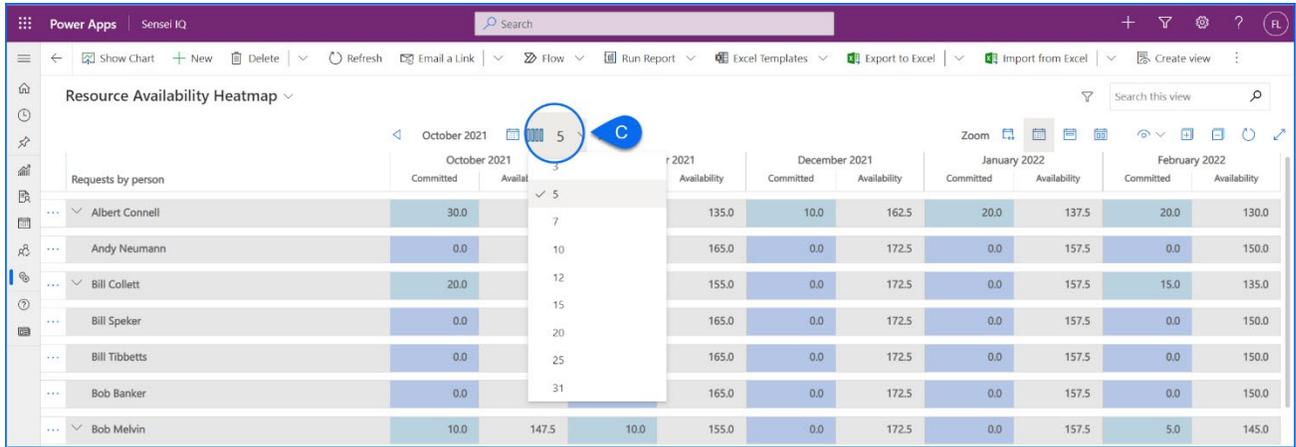


b. Change the selected **date** for the first period that you want to review resource availability from.

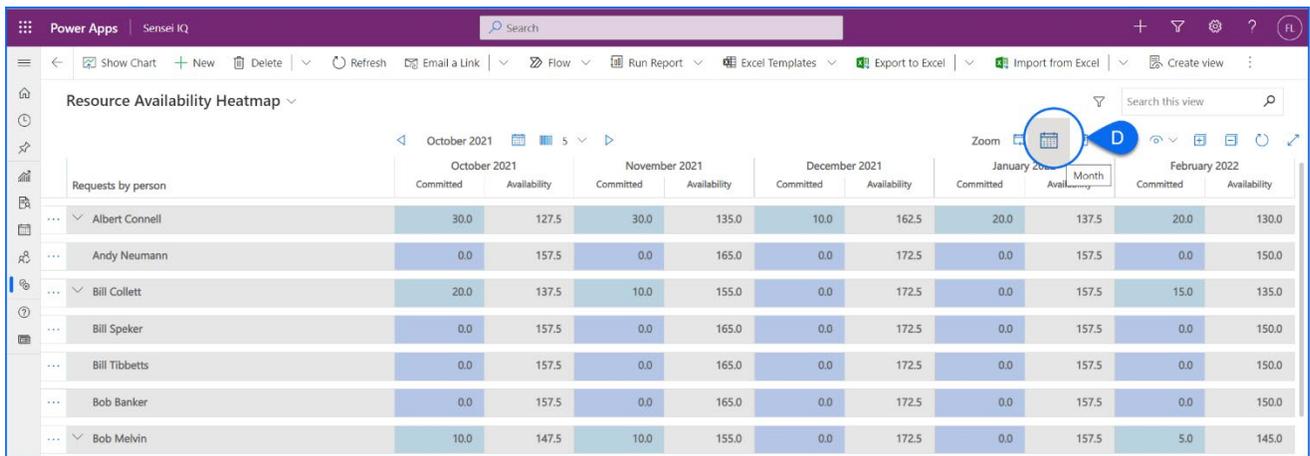




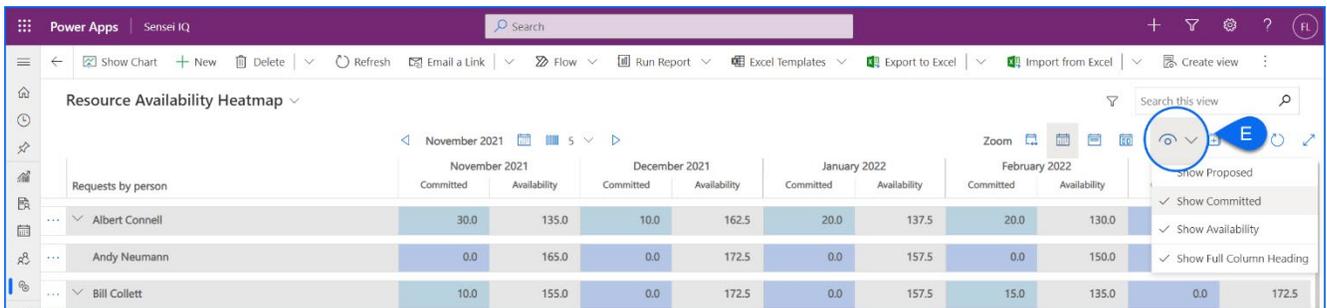
c. Set the number of **periods** you want to be visible on the page.



d. Set the **timescale** of the period that you want to review resource availability from using the **Zoom** feature.



e. Ensure that only **Show Committed**, **Show Availability** and **Show Full Column Heading** options are selected from the **View Options** menu.



Tip: The default view in this report only displays the **Committed** column. Adding the **Show Availability** option to the default view allows you to compare the committed work versus resource availability (i.e., *total capacity for the visible period minus the total committed hours across multiple projects*). Only if you are comparing the total proposed work (also referred to as **unfulfilled submissions**) that are pending approval versus resource availability, you could optionally add the **Show Proposed** option to the view, but it is best interpreted using the **tooltip text** by hovering the mouse



over the **Proposed** cell to get more contextual information (**recommended**)

The screenshot shows a 'Resource Availability Heatmap' in Power Apps. The table displays data for resources from November 2021 to February 2022. A tooltip is open over the 'Proposed' cell for Albert Connell in November 2021, showing a value of 190.0. The tooltip includes a 'Breakdown' section with the following details:

- Proposed Hours - Pending Approval = 190.0 hours
- Capacity = 165.0 hours
- Committed = 30.0 hours
- Net proposed = 160.0 hours
- Proposed availability = -25.0 hours
- Days with capacity: 22 days
- Percentage available: -15%
- Period Status: Submitted

Tip: Use the **Search this view** box to look up a particular named resource from the list. Alternatively, use the controls at the bottom of the page to go the **Next page**, **Previous page**, **First page** or **Last Page**. Use the **Page Size** selector to increase the number of named resources displayed on the page.

This screenshot shows the same 'Resource Availability Heatmap' but with a larger list of resources. The table columns are grouped by month: November 2021, December 2021, January 2022, February 2022, and March 2022. Each month has sub-columns for 'Committed' and 'Availability'. The resources listed include Albert Connell, Andy Neumann, Bill Collett, Bill Speker, Bill Tibbetts, Bob Banker, Bob Melvin, Bret Prinz, Brice Center, Carl Executive, Chad Olson, Chris Thomas, and Cindy Brance. At the bottom right, there are pagination controls showing '1 - 25 of 46', 'Page 1', and 'Page Size: 25'.

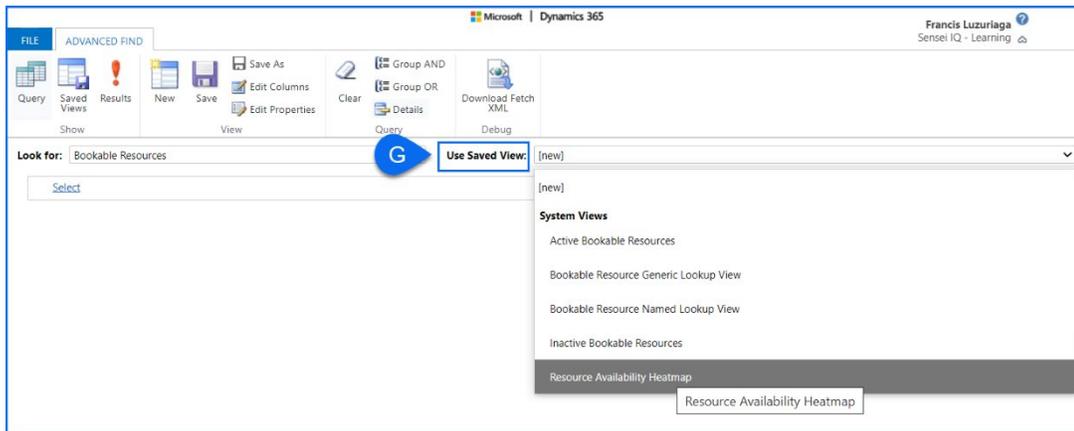
Important: This *read-only* report displays the committed work and availability of **all** named resources (also referred to as **bookable resources**) in Sensei IQ by default. Unless the default system view is customized in your organization's Sensei IQ solution, a personal view can be created with custom filters by the users to only include named resources that they are the line manager for (**recommended**).

- f. From the ribbon, click the **Create View** button to display the **Advanced Find** dialog box.



Requests by person	November 2021		December 2021		January 2022		February 2022		March 2022	
	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Albert Connell	30.0	135.0	10.0	162.5	20.0	137.5	20.0	130.0	0.0	172.5
Andy Neumann	0.0	165.0	0.0	172.5	0.0	157.5	0.0	150.0	0.0	172.5
Bill Collett	10.0	155.0	0.0	172.5	0.0	157.5	15.0	135.0	0.0	172.5
Bill Speker	0.0	165.0	0.0	172.5	0.0	157.5	0.0	150.0	0.0	172.5

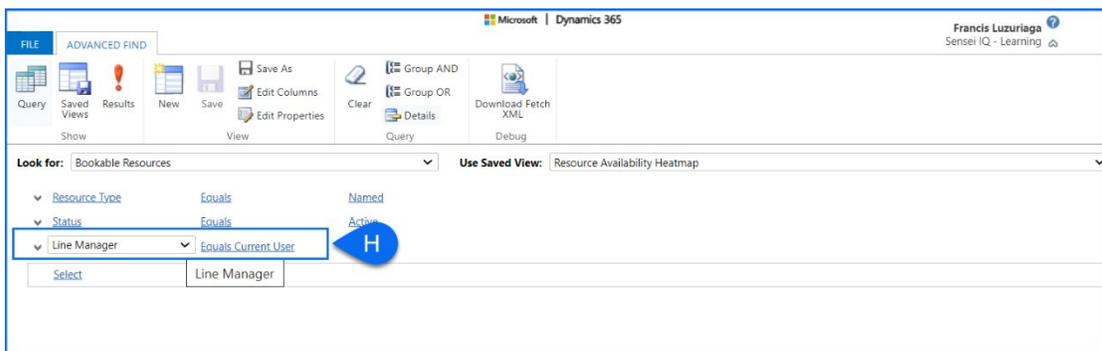
g. In the dialog box, select **Resource Availability Heatmap** from the **Use Saved View** drop-down list.



h. Create an additional filter to the selected view using the next blank row.

- **Line Manager – Equals Current User**

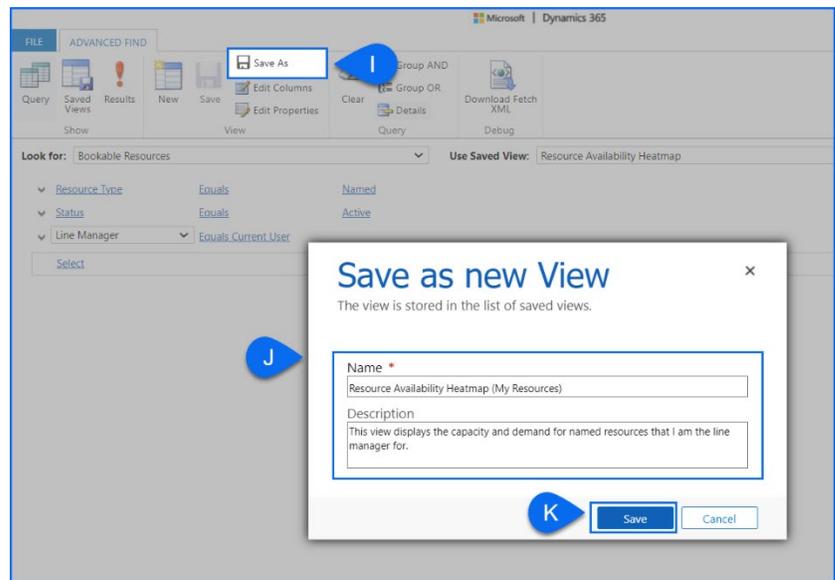
Tip: The default filters **Resource Type – Equals – Named** and **Status – Equals – Active** are automatically displayed on the screen.



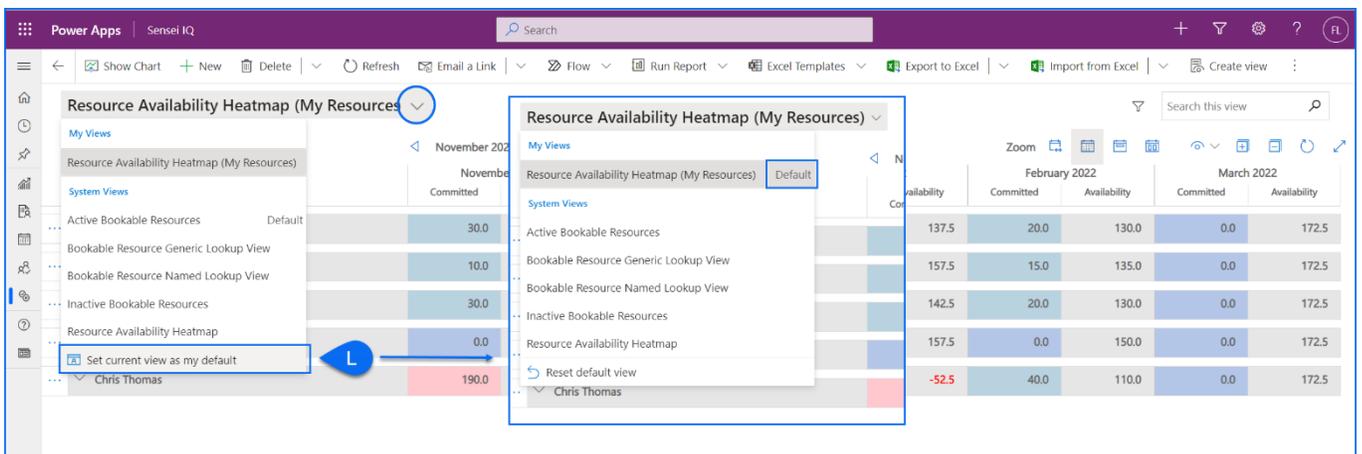
i. Once you have set the custom filter, click the **Save As** button from the **Advanced Find** ribbon.



- j. In the **Save as new View** dialog box, provide a unique name for your custom personal view and a description (**recommended**).
- k. Click the **Save** button and close the dialog box.



- l. Apply the newly added custom personal view from the **My Views** list on the main **Resource Availability Heatmap** page and select **Set current view as my default** from the menu options.



Important: Once the custom personal view is configured using the above steps, the **Resource Availability Heatmap** page will always display the named resources that they are the line manager for.

Requests by person	November 2021		December 2021		January 2022		February 2022		March 2022	
	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Albert Connell	30.0	135.0	10.0	162.5	20.0	137.5	20.0	130.0	0.0	172.5
Bill Collett	10.0	155.0	0.0	172.5	0.0	157.5	15.0	135.0	0.0	172.5
Brice Center	30.0	135.0	10.0	162.5	15.0	142.5	20.0	130.0	0.0	172.5
Carl Executive	0.0	165.0	0.0	172.5	0.0	157.5	0.0	150.0	0.0	172.5
Chris Thomas	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0	0.0	172.5



- m. Enable the **Toggle Full Screen Mode** option to switch the **Resource Availability Heatmap** screen to focus mode.

Requests by person	November 2021		December 2021		January 2022		February 2022		March 2022	
	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Albert Connell	30.0	135.0	10.0	162.5	20.0	137.5	20.0	130.0	0.0	172.5
Bill Collett	10.0	155.0	0.0	172.5	0.0	157.5	15.0	135.0	0.0	172.5
Brice Center	30.0	135.0	10.0	162.5	15.0	142.5	20.0	130.0	0.0	172.5
Carl Executive	0.0	165.0	0.0	172.5	0.0	157.5	0.0	150.0	0.0	172.5
Chris Thomas	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0	0.0	172.5

- n. Click the **Expand All** button to display the second level of rows outlining the project/s under each named resource row on the **Requests by person** view.

Requests by person	November 2021		December 2021		January 2022		February 2022		March 2022	
	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
^ Albert Connell	30.0	135.0	10.0	162.5	20.0	137.5	20.0	130.0	0.0	172.5
... Sensei IQ Resource M...	30.0		10.0		20.0		20.0			
^ Bill Collett	10.0	155.0	0.0	172.5	0.0	157.5	15.0	135.0	0.0	172.5
... => Sensei IQ Resource...	10.0						15.0			
^ Brice Center	30.0	135.0	10.0	162.5	15.0	142.5	20.0	130.0	0.0	172.5
... => Sensei IQ Resource...	30.0		10.0		15.0		20.0			
Carl Executive	0.0	165.0	0.0	172.5	0.0	157.5	0.0	150.0	0.0	172.5
^ Chris Thomas	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0	0.0	172.5
... Sensei IQ Implementa...	140.0		130.0		100.0					
... Sensei IQ Resource M...	50.0		20.0		110.0		40.0			



2. EVALUATE WORK ALLOCATION VERSUS AVAILABILITY OF NAMED RESOURCES

- a. Select a named resource row where the overallocation indicator appears and review the **attached comments** on each request for contextual information.

The screenshot shows a resource allocation table with columns for months from November 2021 to March 2022. Each month has sub-columns for 'Committed' and 'Availability'. A resource named 'Chris Thomas' is highlighted in red in the November 2021 'Committed' column, indicating an overallocation. A popup window titled 'Sensei IQ Resource Management Implement...' is open over the Chris Thomas row, displaying comments from Francis Luzuriaga dated Oct 7, Oct 8, and Oct 26. The Oct 8 comment states: 'I have increased the requested effort for Chris Thomas for November from 40 hours to 50 hours due to a change in scope.' The Oct 26 comment states: 'All work for Chris in this project have been over allocated in this view! without any amendment from the original request.'

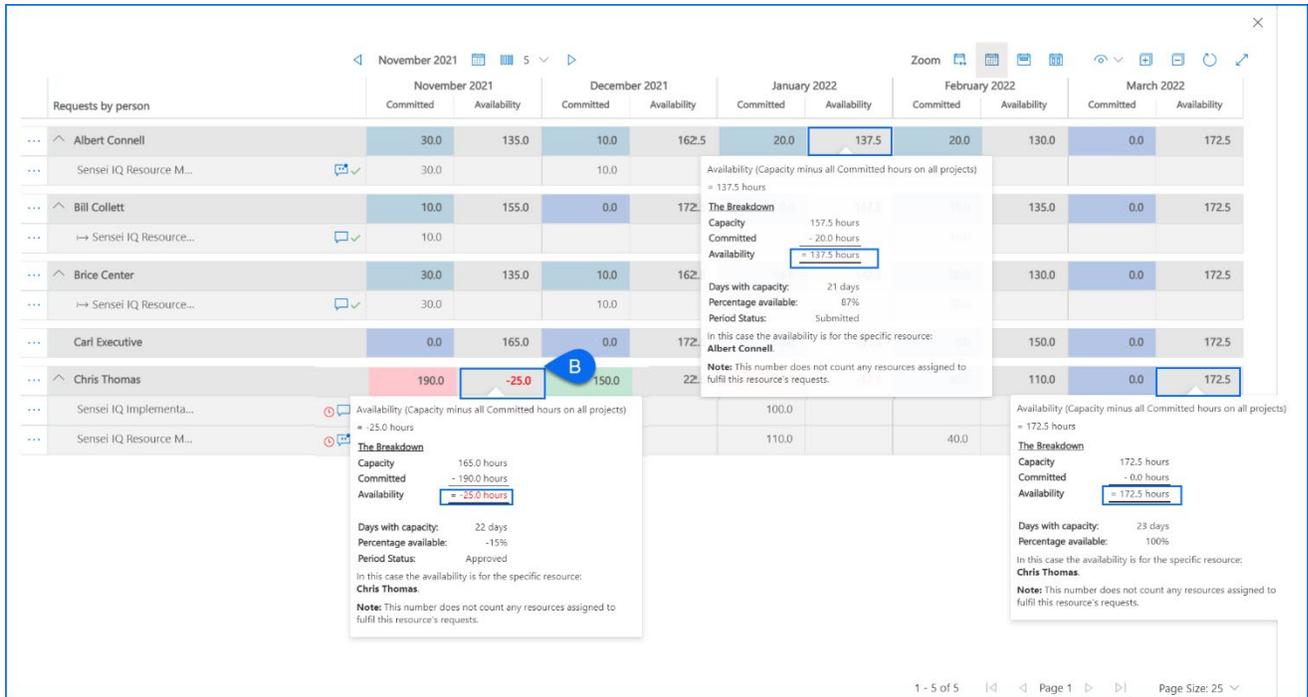
Requests by person	November 2021		December 2021		January 2022		February 2022		March 2022	
	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Albert Connell	30.0	135.0	10.0	162.5	20.0	137.5	20.0	130.0	0.0	172.5
Sensei IQ Resource M...	30.0		10.0		20.0		20.0			
Bill Collett	10.0	155.0	0.0	172.5	0.0	157.5	15.0	135.0	0.0	172.5
Sensei IQ Resource...	10.0						15.0			
Brice Center				162.5	15.0	142.5	20.0	130.0	0.0	172.5
Sensei IQ Resource...					15.0		20.0			
Carl Executive				172.5	0.0	157.5	0.0	150.0	0.0	172.5
Chris Thomas	22.5		210.0	-52.5	40.0	110.0	0.0	172.5		
Sensei IQ Implementa...				100.0						
Sensei IQ Resource M...				110.0			40.0			

Tip: This page only displays the requests for the visible period that have been **approved** and/or **overwritten by the approver** for named resources that were specifically requested and/or not specifically requested but were allocated to fulfill another request partially or as a substitute to another resource.

The screenshot shows the same resource allocation table as above. A tooltip is visible over the 'Brice Center' row, stating: 'Is a fulfillment for another request.' Another tooltip is visible over the 'Chris Thomas' row, stating: 'The visible period for this request is currently Approved, some of which has been overwritten by an approver.'

Requests by person	November 2021		December 2021		January 2022		February 2022		March 2022	
	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Albert Connell	30.0	135.0	10.0	162.5	20.0	137.5	20.0	130.0	0.0	172.5
Sensei IQ Resource M...	30.0		10.0		20.0		20.0			
Bill Collett	10.0	155.0	0.0	172.5	0.0	157.5	15.0	135.0	0.0	172.5
Sensei IQ Resource...	10.0						15.0			
Brice Center	30.0	135.0	10.0	162.5	15.0	142.5	20.0	130.0	0.0	172.5
Sensei IQ Resource...	30.0		10.0		15.0		20.0			
Carl Executive							0.0	150.0	0.0	172.5
Chris Thomas	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0	0.0	172.5
Sensei IQ Implementa...	140.0		130.0		100.0					
Sensei IQ Resource M...	50.0		20.0		110.0		40.0			

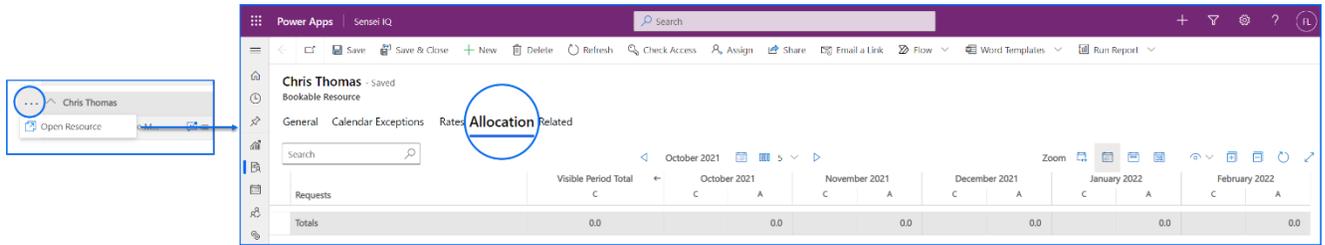
- b. Hide the comments and evaluate the overall remaining availability of the named resources individually, particularly where a **negative red** value appears in the **Availability** column or the **tooltip text** when you hover the mouse over each visible period.



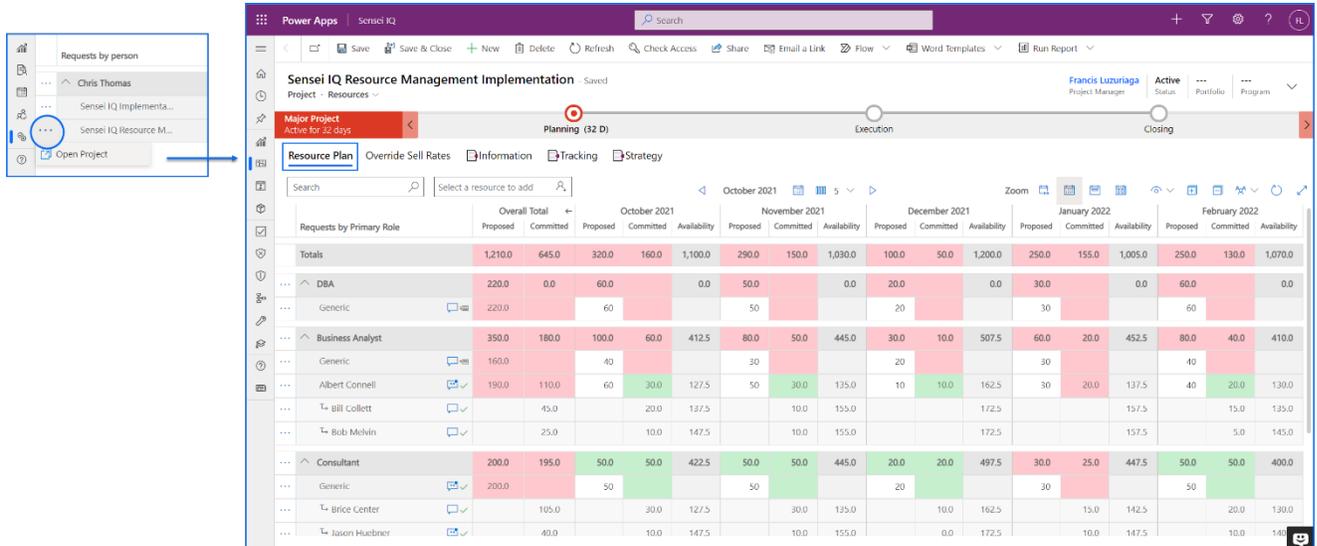
Availability Heatmap Legend:

	<p>Committed work is at least 10% over the resource capacity for the visible period. It means that the resource is overallocated and has negative availability.</p>
	<p>Committed work is equal to 100% of resource capacity for the visible period. It means that the resource is fully allocated and has zero availability.</p>
<p>A gradient of blue and green in 10% increments</p>	<p>Committed work is between 0% and 100% of the resource capacity for the visible period. It means that the resource is under allocated and has low to high availability, they are under-utilized.</p>
	<p>There is no committed work for the visible period. It means that the resource is not allocated (under-utilized) and has full availability.</p>

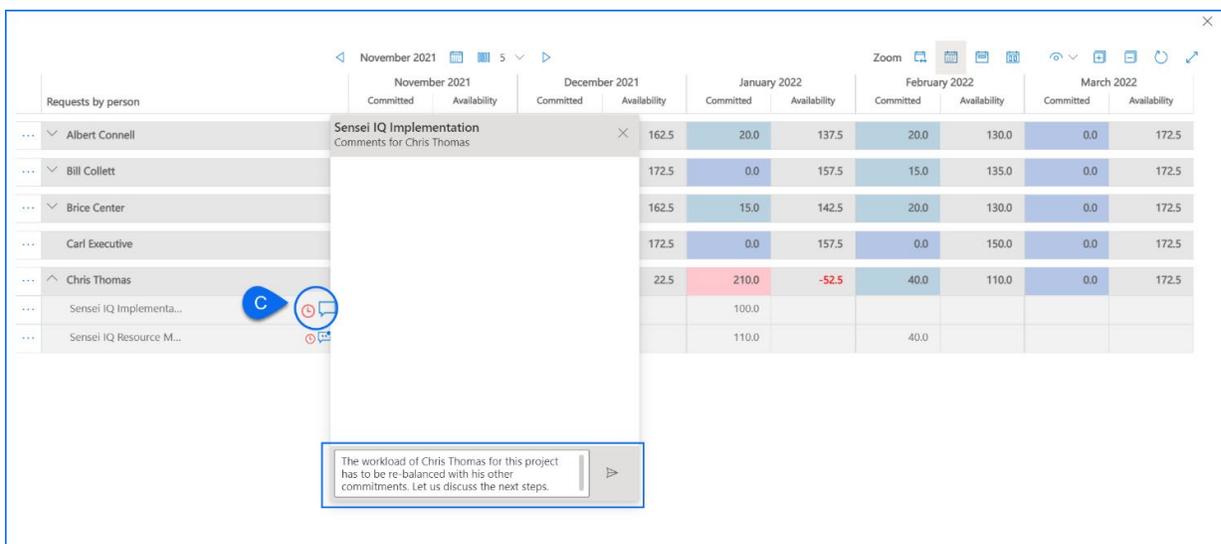
Tip: If you want to further understand the allocation of the selected named resource across other projects, you can click the **Primary Role Menu** button (...) in front of the primary resource role name and then the **Open Resource** button to access the **Allocation** tab of the named resource in a separate window.



Tip: If you want to further understand the allocation of the named resources across a particular project, you can click the **Row Menu** button (...) in front of the project name and then the **Open Project** button to access the **Resource Plan** tab of the selected project in a separate window.



- c. Attach **comments** to the resource request of the project/s with **overallocation** to balance the resource workload with the respective project managers by either reallocating a portion of the committed work to someone else and/or moving it to another period when the allocated resource has more (**recommended**).



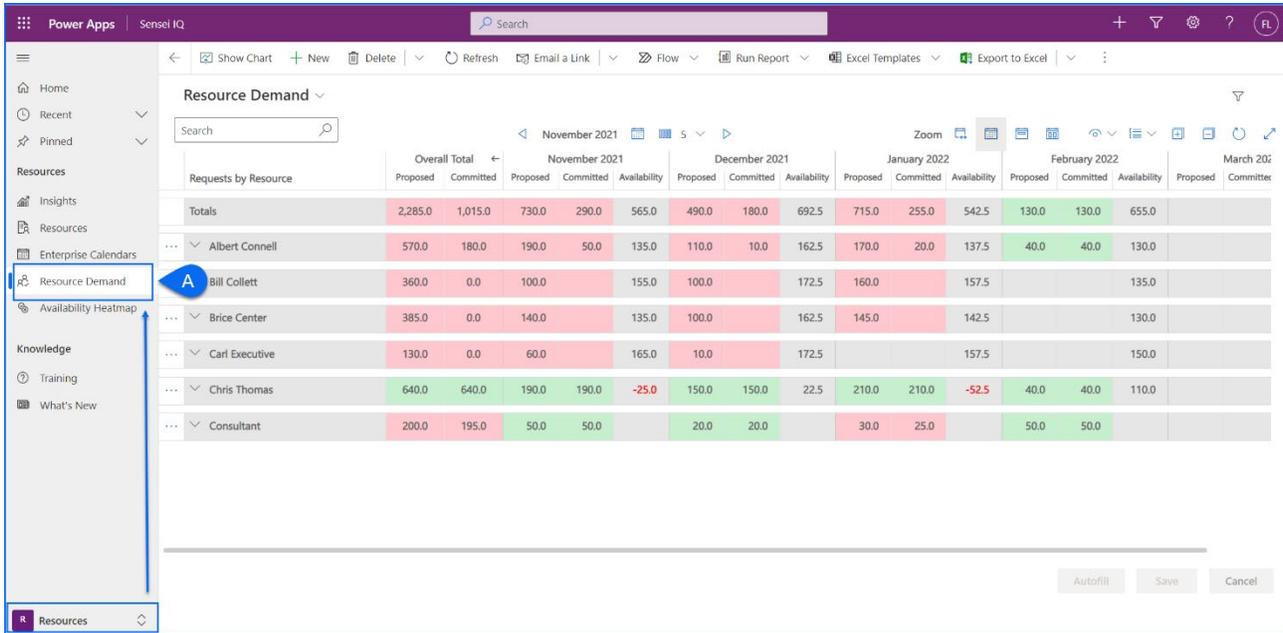
Identify resource allocation from the Resource Demand screen

Resource Manager

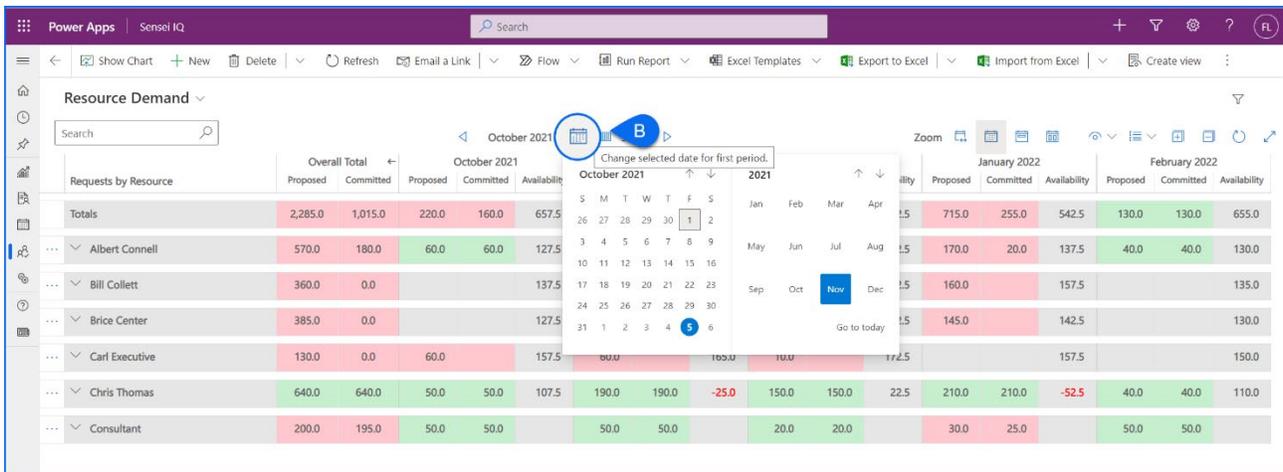
Resources > Resources > Resource Demand

1. SET THE RESOURCE DEMAND HORIZON

- a. Ensure that you are in the **Resources** area and click **Resource Demand** in the **Resources** section.



- b. Change the selected **date** for the first period that you want to review resource availability from.



- c. Set the number of **periods** you want to be visible on the page.



The screenshot shows the 'Resource Demand' screen in Power Apps. A calendar icon is circled in blue, and a dropdown menu is open showing a zoom to 5 days. The table below shows resource availability and demand for October 2021, December 2021, January 2022, and February 2022.

Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022		February 2022			
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
Totals	2,285.0	1,015.0	220.0	160.0	657.5	0	0	0	490.0	180.0	692.5	715.0	255.0	542.5	130.0	130.0	655.0
Albert Connell	570.0	180.0	60.0	60.0	127.5	0	0	0	110.0	10.0	162.5	170.0	20.0	137.5	40.0	40.0	130.0
Bill Collett	360.0	0.0			137.5	0	0	0	100.0		172.5	160.0		157.5			135.0
Brice Center	385.0	0.0			127.5	0	0	0	100.0		162.5	145.0		142.5			130.0
Carl Executive	130.0	0.0	60.0		157.5	0	0	0	10.0		172.5		157.5				150.0
Chris Thomas	640.0	640.0	50.0	50.0	107.5	0	0	0	150.0	150.0	22.5	210.0	210.0	-52.5	40.0	40.0	110.0
Consultant	200.0	195.0	50.0	50.0		50.0	50.0		20.0	20.0		30.0	25.0		50.0	50.0	

d. Set the **timescale** of the period that you want to review resource availability from using the **Zoom** feature.

The screenshot shows the 'Resource Demand' screen in Power Apps. A calendar icon is circled in blue, and a dropdown menu is open showing a zoom to 1 month. The table below shows resource availability and demand for October 2021, November 2021, December 2021, and February 2022.

Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
Totals	590.0	100.0	170.0	50.0	422.5	160.0	50.0	445.0	40.0		517.5	140.0		472.5	80.0		450.0
Albert Connell	190.0	100.0	60.0	50.0	107.5	50.0	50.0	115.0	10.0		172.5	30.0		157.5	40.0		150.0
Carl Executive	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150.0
Chris Thomas	270.0	0.0	50.0		157.5	50.0		165.0	20.0		172.5	110.0		157.5	40.0		150.0

e. Ensure that only **Show Committed, Show Availability, Show Overall Row Totals** and **Show Full Column Heading** options are selected from the **View Options** menu.

The screenshot shows the 'Resource Demand' screen in Power Apps. The 'View Options' menu is open, showing the following options: Show Proposed, Show Committed, Show Availability, Show Overall Row Totals, Hide Total Columns, and Show Full Column Heading. The 'Show Committed', 'Show Availability', 'Show Overall Row Totals', and 'Show Full Column Heading' options are checked.

Requests by Resource	Overall Total		October 2021		November 2021		December 2021		January 2022		Availability
	Committed		Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	
Totals	1,015.0		160.0	657.5	290.0	565.0	180.0	692.5	255.0		5.0
Albert Connell	180.0		60.0	127.5	50.0	135.0	10.0	162.5	20.0		0.0
Bill Collett	0.0			137.5		155.0		172.5			5.0
Brice Center	0.0			127.5		135.0		162.5			0.0
Carl Executive	0.0			157.5		165.0		172.5			150.0
Chris Thomas	640.0		50.0	107.5	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0
Consultant	195.0		50.0		50.0		20.0		25.0		50.0

f. Enable the **Toggle Full Screen Mode** option to switch the **Resource Demand** screen to focus mode.



The screenshot shows the 'Resource Demand' view in Power Apps, filtered to 'Requests by Resource'. The table displays resource capacity and demand across four months: October 2021, November 2021, December 2021, and January 2022. Each month has columns for 'Committed' and 'Availability'. A 'Toggle Full Screen mode' button is circled in blue.

Requests by Resource	Overall Total Committed	October 2021		November 2021		December 2021		January 2022		Committed	Availability
		Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability		
Totals	1,015.0	160.0	657.5	290.0	565.0	180.0	692.5	255.0	542.5	130.0	655.0
Albert Connell	180.0	60.0	127.5	50.0	135.0	10.0	162.5	20.0	137.5	40.0	130.0
Bill Collett	0.0		137.5		155.0		172.5		157.5		135.0
Brice Center	0.0		127.5		135.0		162.5		142.5		130.0
Carl Executive	0.0		157.5		165.0		172.5		157.5		150.0
Chris Thomas	640.0	50.0	107.5	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0
Consultant	195.0	50.0		50.0		20.0		25.0		50.0	

g. Apply either the **Requests by Project** or **Requests by Resource** view (**recommended**) using the **Grouping** menu depending on your preferred method of evaluating the resource capacity and demand.

The screenshot shows the 'Resource Demand' view in Power Apps, filtered to 'Requests by Project'. The table displays project capacity and demand across four months. A 'Grouping' menu is open, showing 'Project' and 'Resource' options. A blue arrow points to the 'Requests by Project' view.

Requests by Project	Overall Total Committed	October 2021		November 2021		December 2021		January 2022		Committed	Availability
		Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability		
Totals	1,015.0	160.0	1,100.0	290.0	1,030.0	180.0	1,200.0	255.0	1,005.0	130.0	1,070.0
Sensei IQ Implementation	370.0		500.0	140.0	-400.0	130.0	520.0	100.0	385.0		505.0
Sensei IQ Resource Management Implementation	645.0	160.0	1,100.0	150.0	1,030.0	50.0	1,200.0	155.0	1,005.0	130.0	1,070.0

The screenshot shows the 'Resource Demand' view in Power Apps, filtered to 'Requests by Resource'. The table displays resource capacity and demand across four months. A 'Grouping' menu is open, showing 'Project' and 'Resource' options. A blue arrow points to the 'Requests by Resource' view.

Requests by Resource	Overall Total Committed	October 2021		November 2021		December 2021		January 2022		Committed	Availability
		Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability		
Totals	1,015.0	160.0	657.5	290.0	565.0	180.0	692.5	255.0	542.5	130.0	655.0
Albert Connell	180.0	60.0	127.5	50.0	135.0	10.0	162.5	20.0	137.5	40.0	130.0
Bill Collett	0.0		137.5		155.0		172.5		157.5		135.0
Brice Center	0.0		127.5		135.0		162.5		142.5		130.0
Carl Executive	0.0		157.5		165.0		172.5		157.5		150.0
Chris Thomas	640.0	50.0	107.5	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0
Consultant	195.0	50.0		50.0		20.0		25.0		50.0	

h. Click the **Expand All** button to display the second level of rows outlining the project/s under each named resource row.



Requests by Resource	Overall Total Committed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Totals	1,015.0	160.0	657.5	290.0	565.0	180.0	692.5	255.0	542.5	130.0	655.0
Albert Connell	180.0	60.0	127.5	50.0	135.0	10.0	162.5	20.0	137.5	40.0	130.0
Sensei IQ Resource M...	110.0	30		30		10		20		20	
Bill Collett	45.0	20	137.5	10	155.0		172.5		157.5	15	135.0
Bob Melvin	25.0	10	147.5	10	155.0		172.5		157.5	5	145.0
Bill Collett	0.0		137.5		155.0		172.5		157.5		135.0
Brice Center	0.0		127.5		135.0		162.5		142.5		130.0
Carl Executive	0.0		157.5		165.0		172.5		157.5		150.0
Chris Thomas	640.0	50.0	107.5	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0
Sensei IQ Implementa...	370.0			140		130		100			
Sensei IQ Resource M...	270.0	50		50		20		110		40	
Consultant	195.0	50.0		50.0		20.0		25.0		50.0	
Sensei IQ Resource M...											
Brice Center	105.0	30	127.5	30	135.0	10	162.5	15	142.5	20	130.0

2. EVALUATE WORK ALLOCATION VERSUS AVAILABILITY OF NAMED RESOURCES

- a. Select a named resource row where the overallocation indicator appears and review the **attached comments** on each request for contextual information.

Requests by Resource	Overall Total Committed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Albert Connell	180.0	60.0	127.5	50.0	135.0	10.0	162.5	20.0	137.5	40.0	130.0
Sensei IQ Resource M...	110.0	30		30		10		20		20	
Bill Collett	45.0	20	137.5	10	155.0		172.5		157.5	15	135.0
Bob Melvin	25.0	10	147.5	10	155.0		172.5		157.5	5	145.0
Bill Collett	0.0		137.5		155.0		172.5		157.5		135.0
Brice Center	0.0		127.5		135.0		162.5		142.5		130.0
Carl Executive	0.0		157.5		165.0		172.5		157.5		150.0
Chris Thomas	640.0	50.0	107.5	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0
Sensei IQ Implementa...	370.0			140		130		100			
Sensei IQ Resource M...	270.0	50		50		20		110		40	
Consultant	195.0	50.0		50.0		20.0		25.0		50.0	
Sensei IQ Resource M...											
Brice Center	105.0	30	127.5	30	135.0	10	162.5	15	142.5	20	130.0
Jason Huebner				10	155.0	0	172.5	10	147.5	10	140.0
Walt Nickel				10	155.0	10	162.5	0	157.5	20	130.0

Sensei IQ Resource Management Implement...
Comments for Chris Thomas

- Francis Lazuriaga Oct 7
I would like to request Chris Thomas please as he is already familiar with the project scope and he has capacity to work on this project.
- Francis Lazuriaga Oct 8
I have increased the requested effort for Chris Thomas for November from 40 hours to 50 hours due to a change in scope.
- Francis Lazuriaga Oct 26
The requested work for Chris in this project have over allocated in this view without any amendment from the original request.
- Francis Lazuriaga Oct 27
I have reduced the committed work of Chris in November from 50 to 30 hours as he will be away on leave for 3 days as per conversation.

- b. Hide the comments and evaluate the overall remaining availability of the named resource individually, particularly where a **negative red** value appears in the **Availability** column or the **tooltip text** when you hover the mouse over each visible period.



The screenshot shows the 'Resource Demand' view in Power Apps. The table displays resource allocation across months from October 2021 to February 2022. A tooltip for Chris Thomas is open, showing a breakdown of capacity and availability.

Requests by Resource	Overall Total	October 2021		November 2021		December 2021		January 2022		February 2022	
		Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Albert Connell	180.0	60.0	127.5	50.0	135.0	10.0	162.5	20.0	137.5	40.0	130.0
Sensei IQ Resource M...	110.0	30		30		10		20		20	
Bill Collett	45.0	20	137.5	10	155.0		172.5		157.5	15	135.0
Bob Melvin	25.0	10	147.5	10	155.0		172.5		157.5	5	145.0
Bill Collett	0.0		137.5		155.0		172.5		157.5		135.0
Brice Center	0.0		127.5		135.0		162.5		142.5		130.0
Carl Executive	0.0		157.5				172.5		157.5		150.0
Chris Thomas	640.0	50.0	107.5	190.0	-25.0	22.5	210.0	-52.5	40.0	110.0	
Sensei IQ Implementa...	370.0						100				
Sensei IQ Resource M...	270.0	50					110		40		
Consultant	195.0	50.0					25.0		50.0		
Sensei IQ Resource M...											
Brice Center	105.0	30					162.5	15	142.5	20	130.0
Jason Huebner	40.0	10					172.5	10	147.5	10	140.0
Walt Nickel	50.0	10					162.5	0	157.5	20	130.0

Chris Thomas Tooltip:
 Availability (Capacity minus all Committed hours on all projects) = 25.0 hours
 The Breakdown:
 Capacity = 165.0 hours
 Committed = 190.0 hours
 Availability = -25.0 hours
 Days with capacity: 22 days
 Percentage available: -15%
 Period Status: Approved
 In this case the availability is for the specific resource:
 Chris Thomas
 Note: This number does not count any resources assigned to fulfill this resource's requests.

Tip: If you want to further understand the allocation of the selected named resource across other projects, you can click the **Primary Role Menu** button (...) in front of the primary resource role name and then the **Open Resource** button to access the **Allocation** tab of the named resource in a separate window.

The screenshot shows the 'Chris Thomas - Allocation' view. The table displays resource allocation across months from October 2021 to February 2022.

Requests	Visible Period Total	October 2021	November 2021	December 2021	January 2022	February 2022
Totals	0.0	0.0	0.0	0.0	0.0	0.0

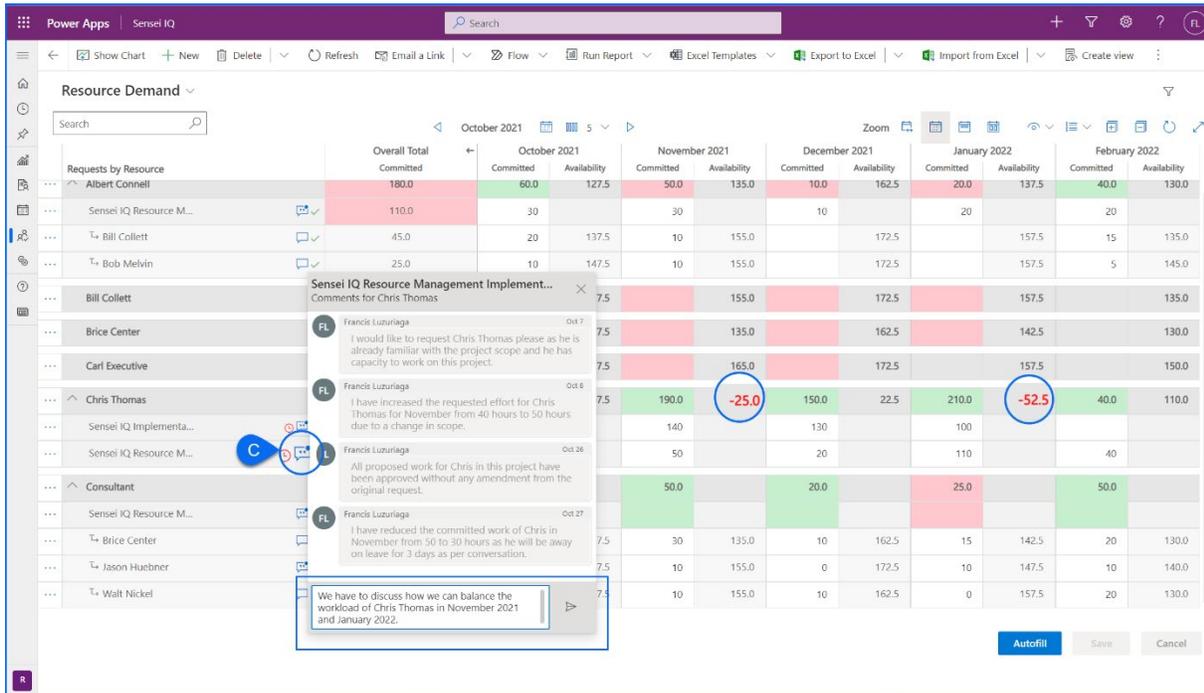
Tip: If you want to further understand the allocation of the named resources across a particular project, you can click the **Row Menu** button (...) in front of the project name and then the **Open Project** button to access the **Resource Plan** tab of the selected project in a separate window.

The screenshot shows the 'Sensei IQ Resource Management Implementation - Resource Plan' view. The table displays resource allocation across months from October 2021 to February 2022.

Requests by Primary Role	Overall Total	October 2021		November 2021		December 2021		January 2022		February 2022				
		Proposed	Committed	Proposed	Committed	Proposed	Committed	Proposed	Committed	Proposed	Committed			
Totals	1,210.0	100.0	320.0	50.0	422.5	290.0	50.0	445.0	100.0	517.5	250.0	472.5	250.0	450.0
DBA	220.0	0.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0	0.0	
Business Analyst	350.0	100.0	100.0	50.0	107.5	80.0	50.0	115.0	30.0	172.5	60.0	157.5	80.0	150.0
Generic	160.0		40		30		20		30		40		40	
Albert Connell	190.0	100.0	60	50.0	107.5	50	50.0	115.0	10	172.5	30	157.5	40	150.0
Consultant	200.0	0.0	50.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0	0.0	
Generic	200.0		50		50		20		30		50		50	
Project Manager	170.0	0.0	60.0	157.5	60.0	165.0	10.0	172.5	20.0	157.5	20.0	157.5	20.0	150.0
Carl Executive	170.0	0.0	60	157.5	60	165.0	10	172.5	20	157.5	20	157.5	20	150.0
Procurement Specialist	270.0	0.0	50.0	157.5	50.0	165.0	20.0	172.5	110.0	157.5	40.0	157.5	40.0	150.0



- c. Attach **comments** to the resource request of the project/s with **overalllocation** to balance the resource workload with the respective project managers by either reallocating a portion of the committed work to someone else and/or moving it to another period when the allocated resource has more availability (**recommended**).

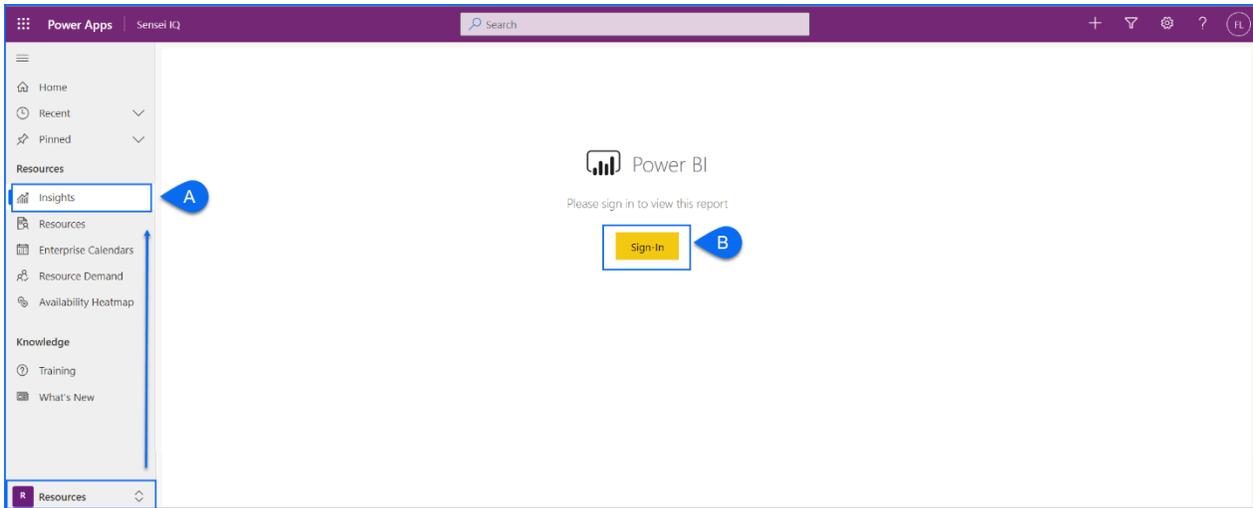


Tip: Once the resource overallocation is identified, you can resolve, if not minimize, the overallocation in agreement with the respective project managers by following the steps outlined in section **3. Modify an existing fulfilled request for named resources** from a related downloadable titled [JOB AID - Reviewing and approving resource requests](#).

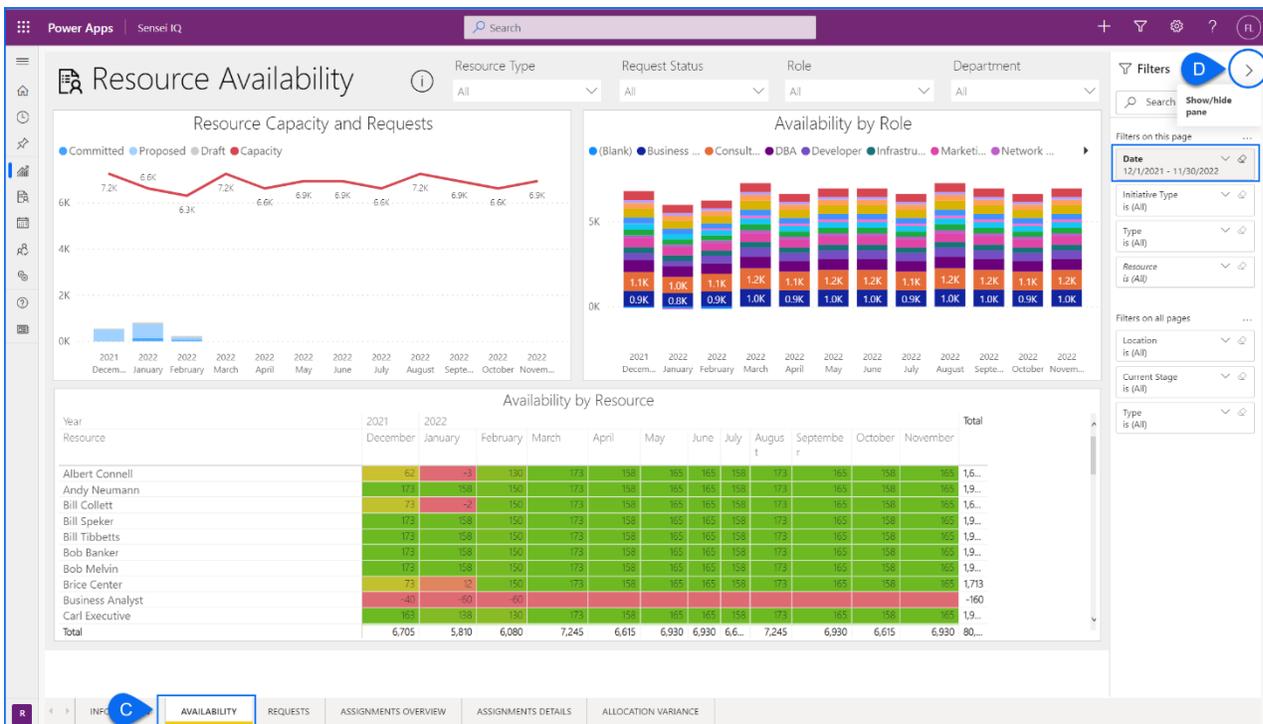
Identify resource overallocation from Insights

1. SET THE FILTERS IN THE AVAILABILITY REPORT PAGE

- a. Ensure that you are in the **Resources** area and click **Insights** in the **Resources** section.
- b. Click the **Sign-in** button (if prompted) to load the pre-configured Power BI report on the page.



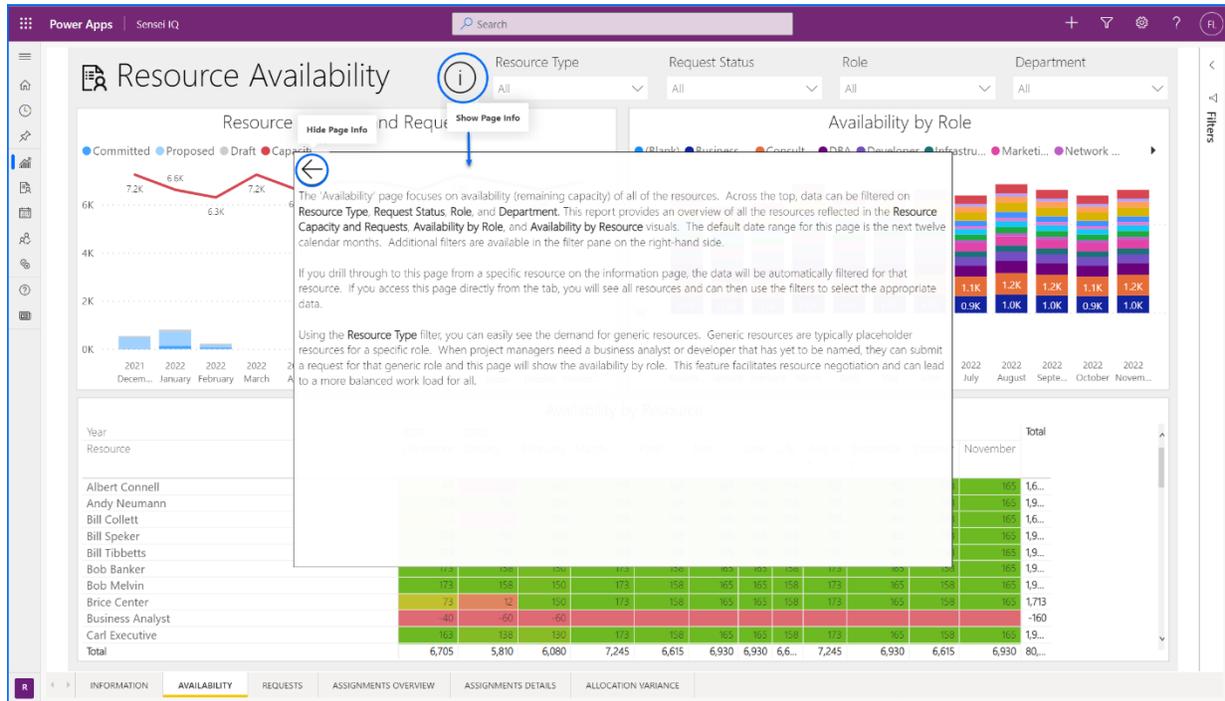
- c. Select the **Availability** report page using the page navigation menu at the bottom of the page.
- d. Click the **Show/Hide pane** chevron button to display the **Filters** pane on the right-hand side and validate the **date** range of the data displayed on the page.



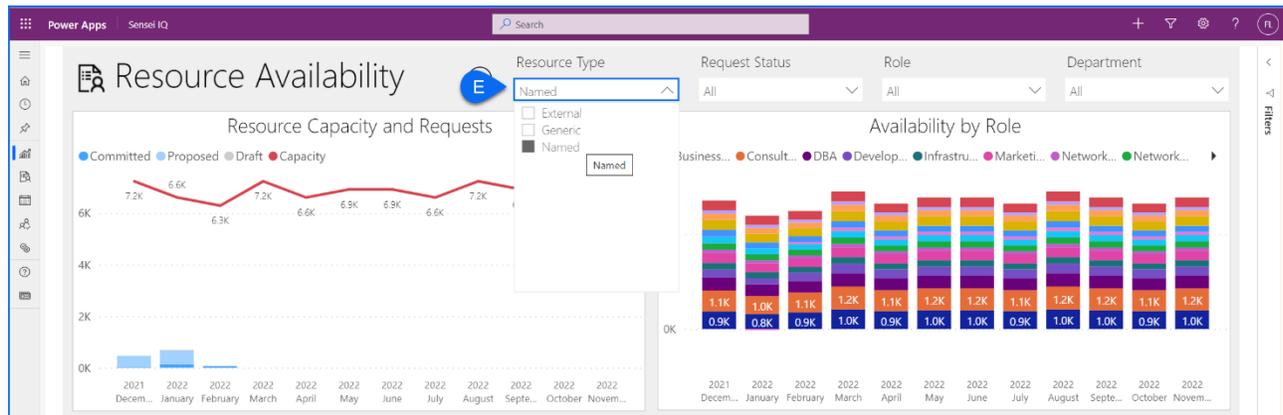


Important: The default date range for this page is the next twelve (12) calendar months.

Tip: Clicking the **Show Page Info** button on each report page allows the user to view a description of the report page (**recommended**).



e. Select **Named** from the **Resource Type** filter to focus on the availability of named resources only.

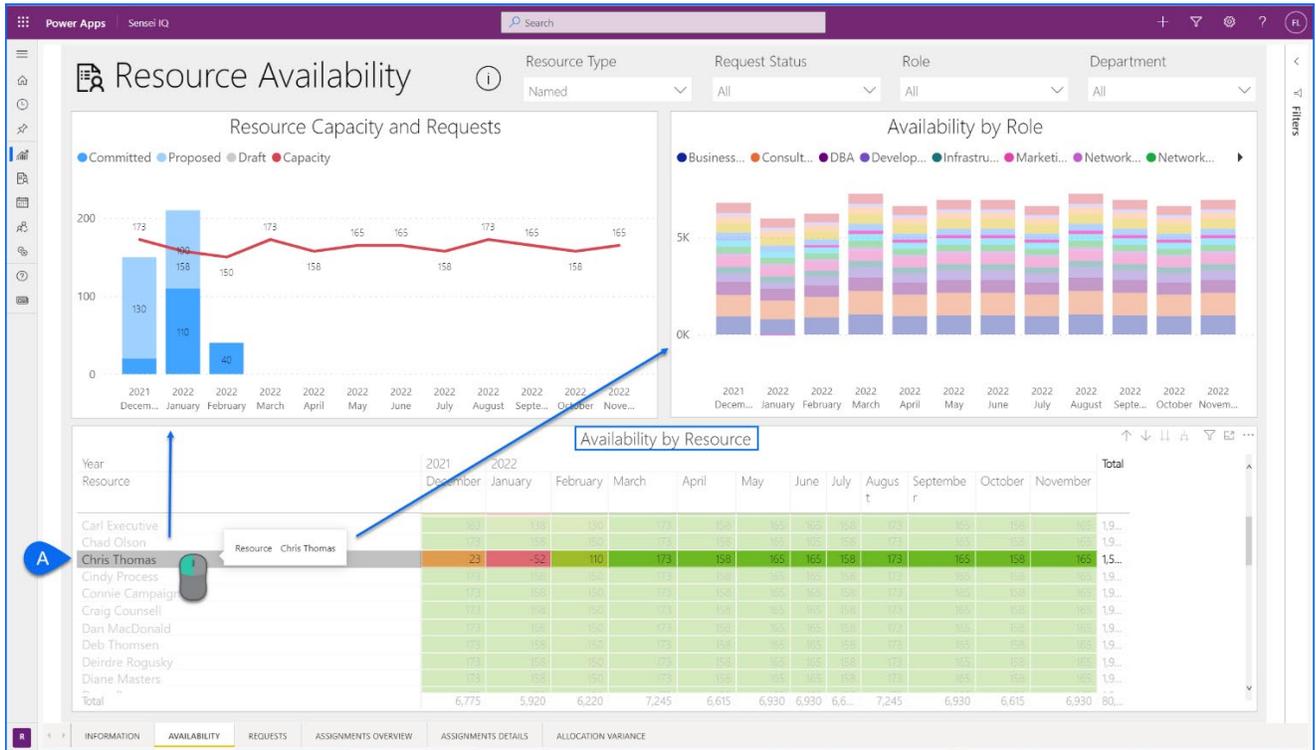


Tip: Across the top of the page, data can also be filtered in the report by **Request Status, Role** and/or **Department**.



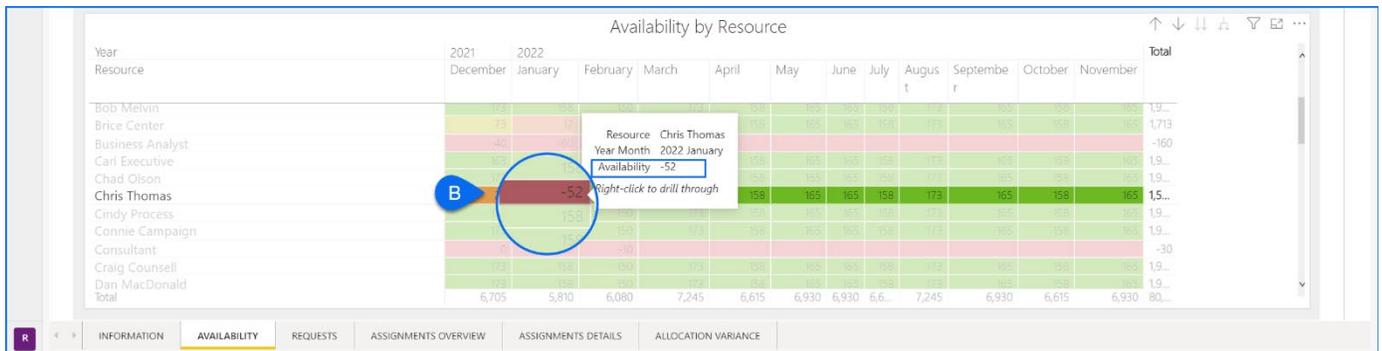
2. EVALUATE WORK ALLOCATION VERSUS AVAILABILITY OF NAMED RESOURCES

- a. Ensure that you have selected a named resource (or named resources if you hold the **Ctrl** key on your keyboard to select multiple names) that you want to evaluate the availability of in the **Availability by Resource** visual.



Tip: Clicking a row in the **Availability by Resource** visual cross-filters the data displayed on the other visuals on the page.

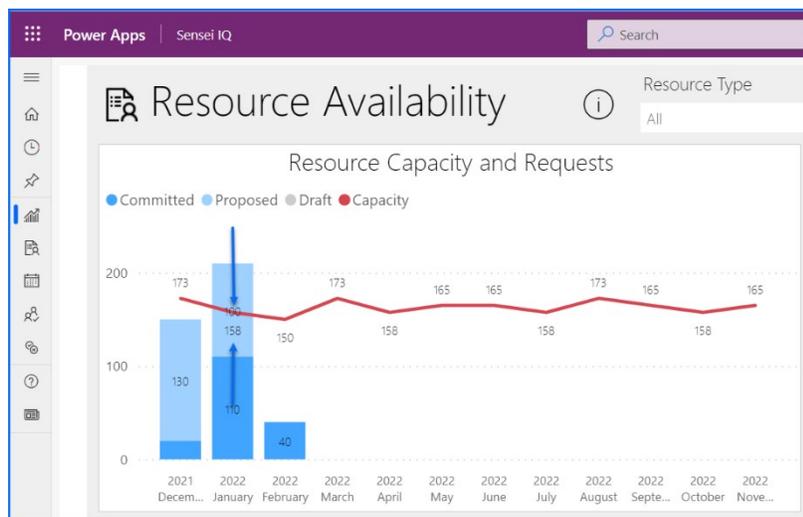
- b. Evaluate the overall remaining availability of the selected named resource/s individually, particularly where a **negative value** in a cell highlighted in **red** appears in a **visible period** or the **tooltip text** when you hover the mouse over each visible period.



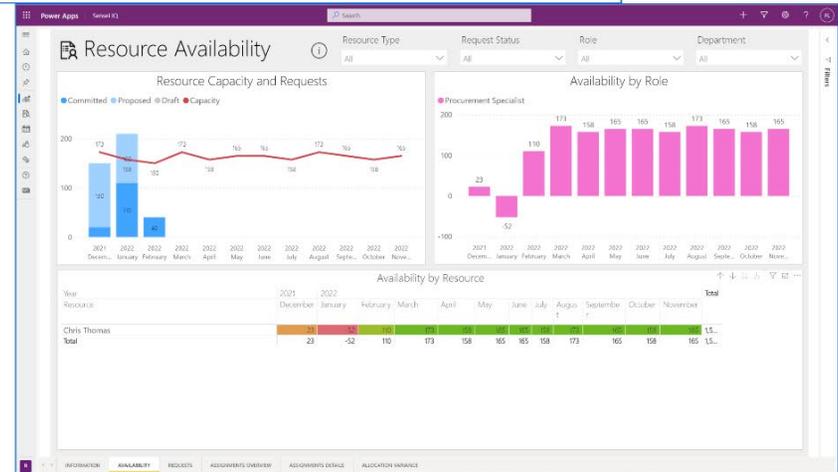
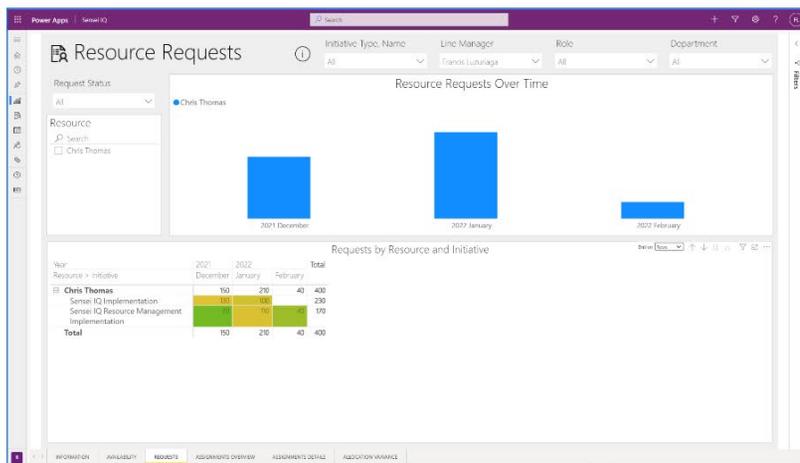
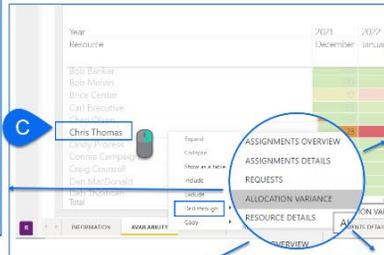
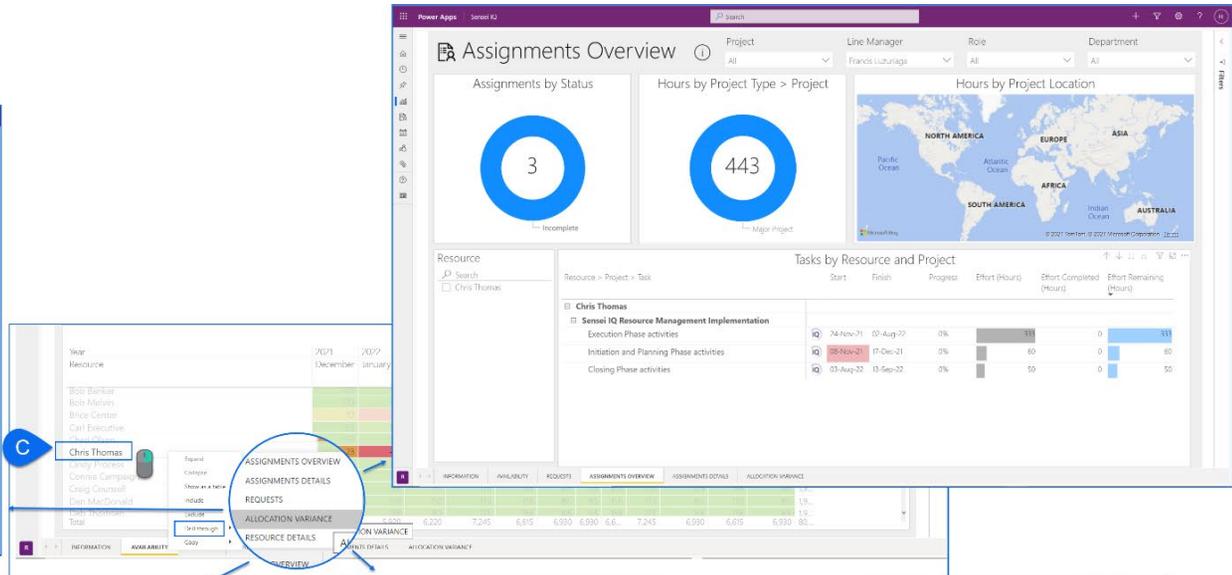
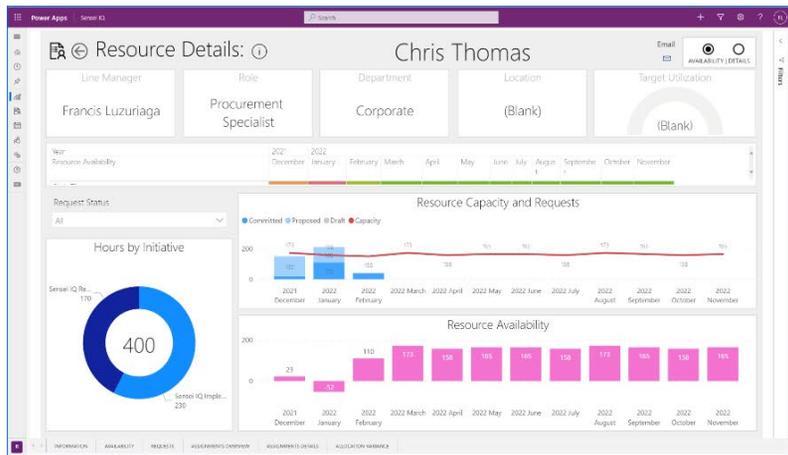
Availability Heatmap Legend:

	<p>Committed work is equal to 100% of resource capacity for the visible period. It means that the resource is fully allocated and has zero availability.</p>
	<p>Committed work is at least 10% over the resource capacity for the visible period. It means that the resource is overallocated and has negative availability.</p>
	<p>There is no committed work for the visible period. It means that the resource is not allocated (under-utilized) and has full availability.</p>
<p>A gradient of red, amber, and green in 10% increments)</p>	<p>Committed work is between 0% and 100% of the resource capacity for the visible period. It means that resource is under allocated and has low to high availability, the resource is (under-utilized).</p>

Tip: Additionally, if the resource requests, particularly *committed work* displayed as a stacked bar chart has exceeded the **red** resource capacity line in the **Resource Capacity and Requests** visual, it means there is resource overallocation for that period. Depending on your organizational rules, line managers are typically required to monitor the balanced workload against the capacity of their resources across all projects.

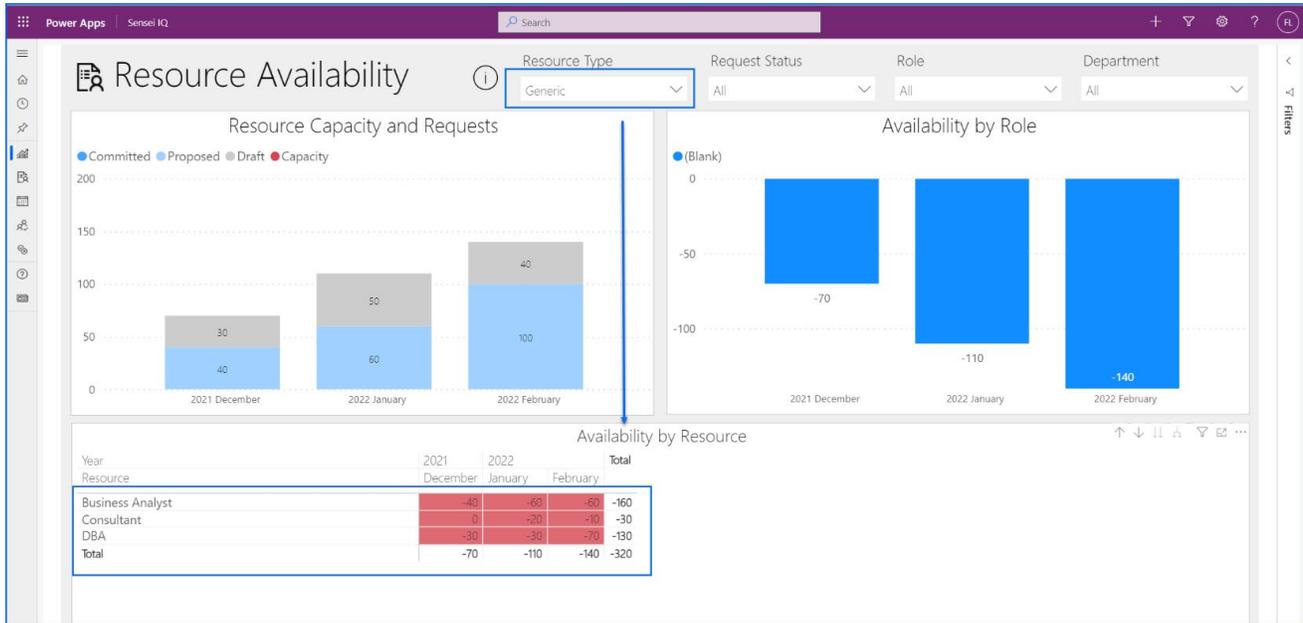


- c. If you want to further investigate on the resource overallocation, right-click on the named resource from the **Availability by Resource** visual and select a report page from the **Drill through** options depending on your area of interest.

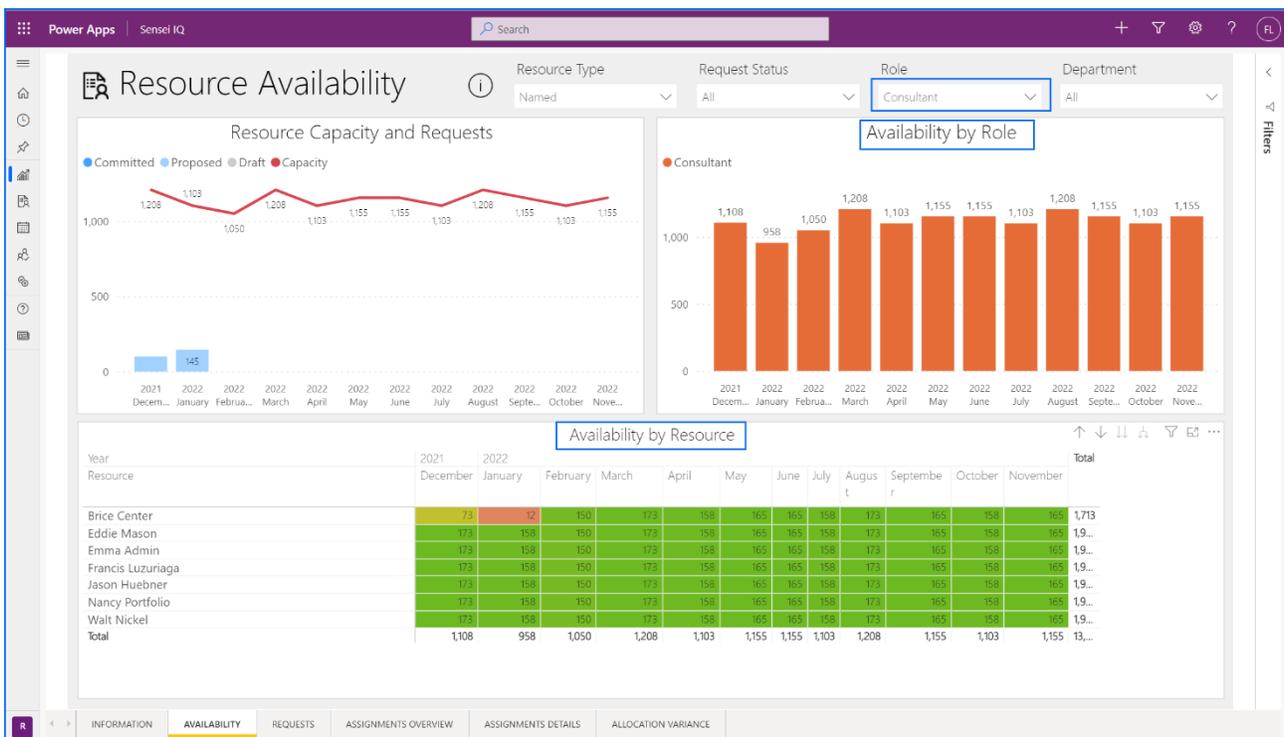


Tip: If you drill through to each of these report pages from the **Availability** report page, the data will be automatically filtered for that selected resource only across the selected page from the **Drill through** options.

Tip: Using the **Resource Type** filter, you can easily see the demand for the generic resources. **Generic resources** are typically placeholder resources for a specific role. Say, when project managers need a business analyst or a consultant that has yet to be specified, they typically submit a request for that generic role and this page will show the availability by role.



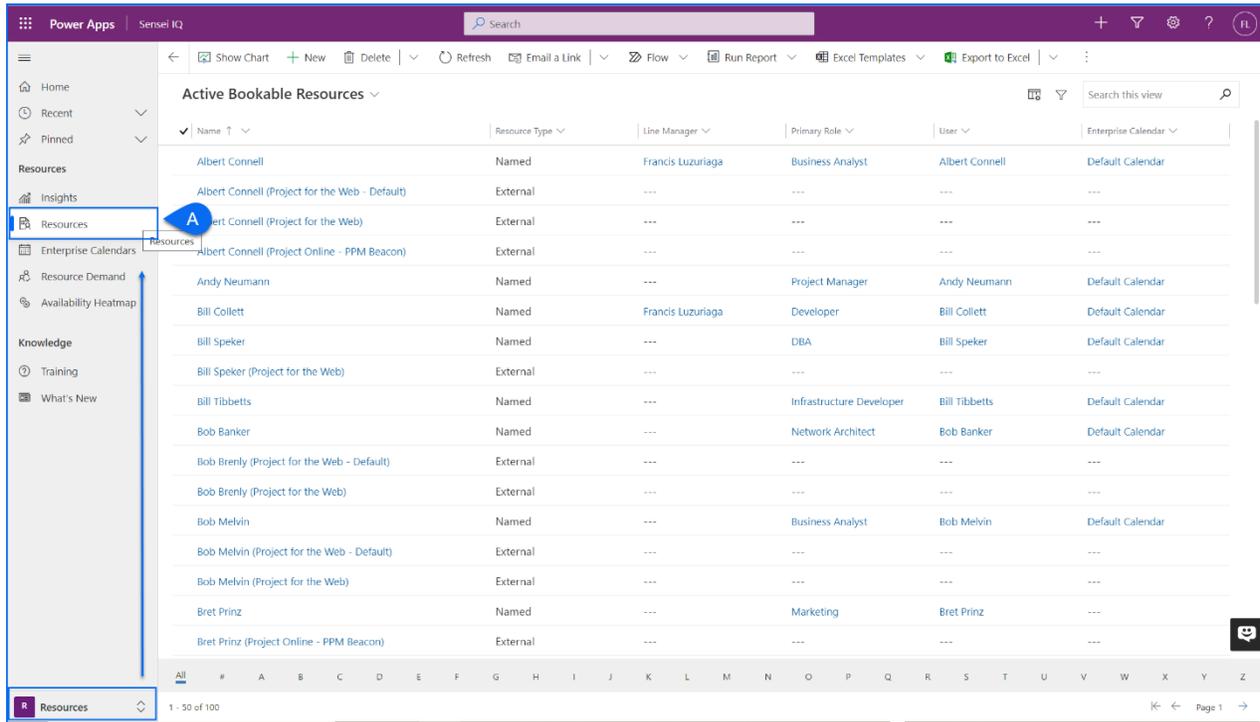
Important: Using the **Role** filter, you can easily see the availability of named resources mapped to the selected **primary role** individually from the filtered data in the **Availability by Resource** visual, or the roll-up data in the **Availability by Role** visual for the next twelve (12) calendar months. This feature allows your organization to facilitate forward planning of resource allocations across projects and making informed decisions on recruitment (or staffing) in the event of skilled resource shortage.



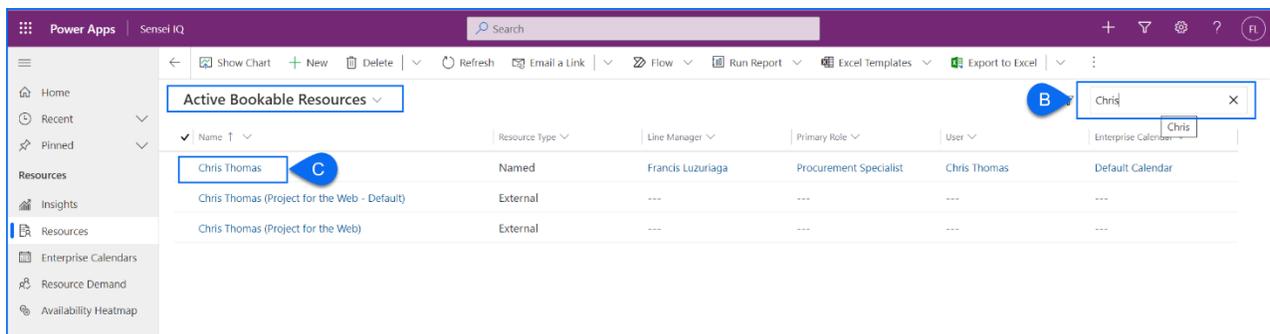
Identify resource allocation from the Allocation tab

1. SET THE RESOURCE ALLOCATION HORIZON

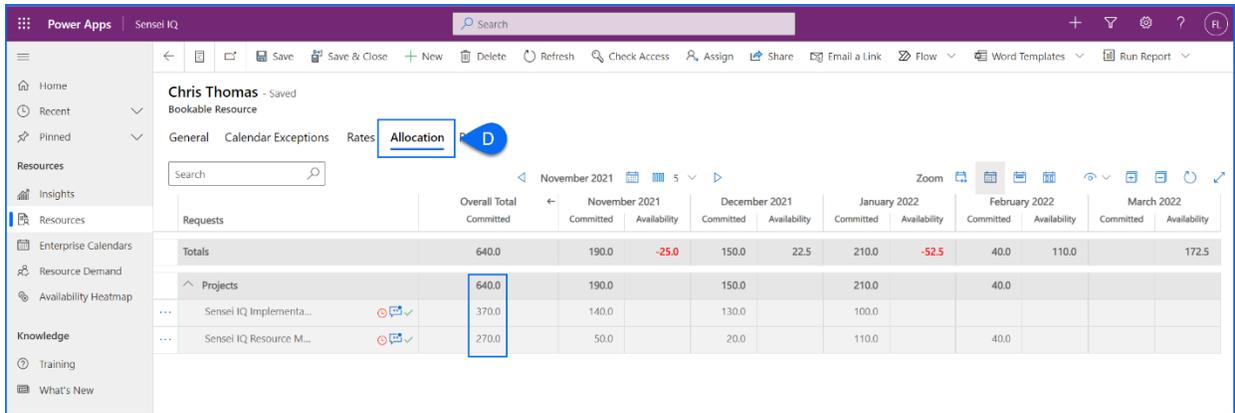
- a. Ensure that you are in the **Resources** area and click **Resources** in the **Resources** section.



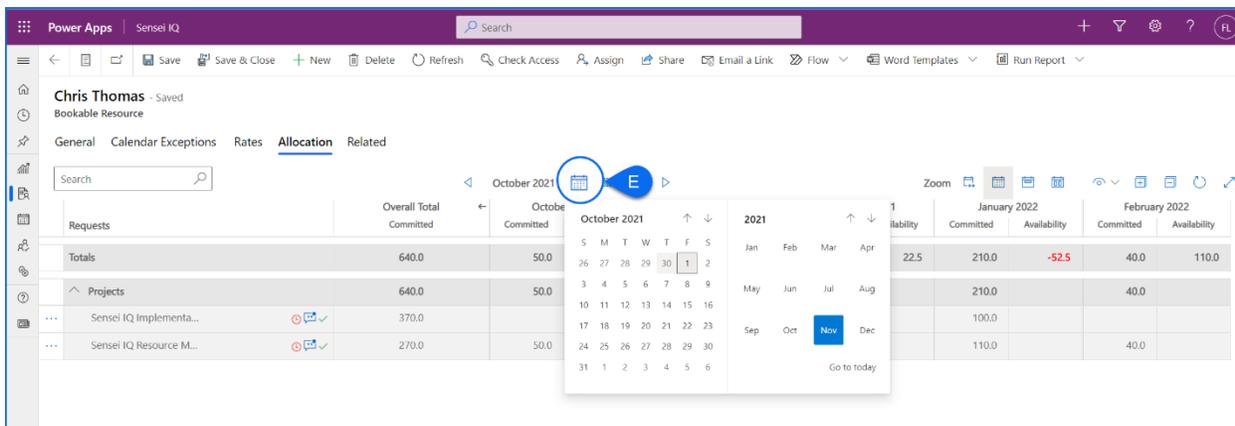
- b. Use the **Search this view** box to look up the named resource from the **Active Bookable Resources** view.
- c. Select the named resource in the **Name** column from the search results displayed on the page.



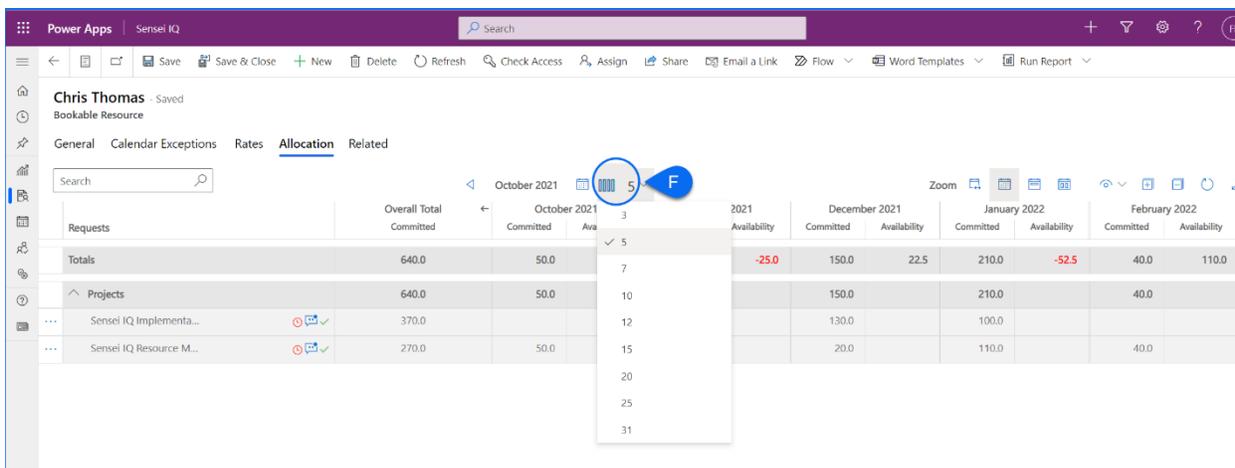
- d. Once the **bookable resource record** is open, click the **Allocation** tab to display the **Committed** hours of the named resource across all projects.



e. Change the selected **date** for the first period that you want to review resource allocation from.



f. Set the number of **periods** you want to be visible on the page.



g. Set the **timescale** of the period that you want to review resource availability from using the **Zoom** feature.



Requests	Overall Total Committed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Totals	640.0	50.0	107.5	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0
Projects	640.0	50.0		190.0		150.0		210.0		40.0	
... Sensei IQ Implementa...	370.0			140.0		130.0		100.0			
... Sensei IQ Resource M...	270.0	50.0		50.0		20.0		110.0		40.0	

h. Ensure that **Show Committed, Show Availability, Show Overall Row Totals** and **Show Full Column Heading** options are selected from the **View Options** menu.

Requests	Overall Total Committed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Totals	640.0	50.0	107.5	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0
Projects	640.0	50.0		190.0		150.0		210.0		40.0	
... Sensei IQ Implementa...	370.0			140.0		130.0		100.0			
... Sensei IQ Resource M...	270.0	50.0		50.0		20.0		110.0		40.0	

2. EVALUATE WORK ALLOCATION VERSUS AVAILABILITY OF NAMED RESOURCES

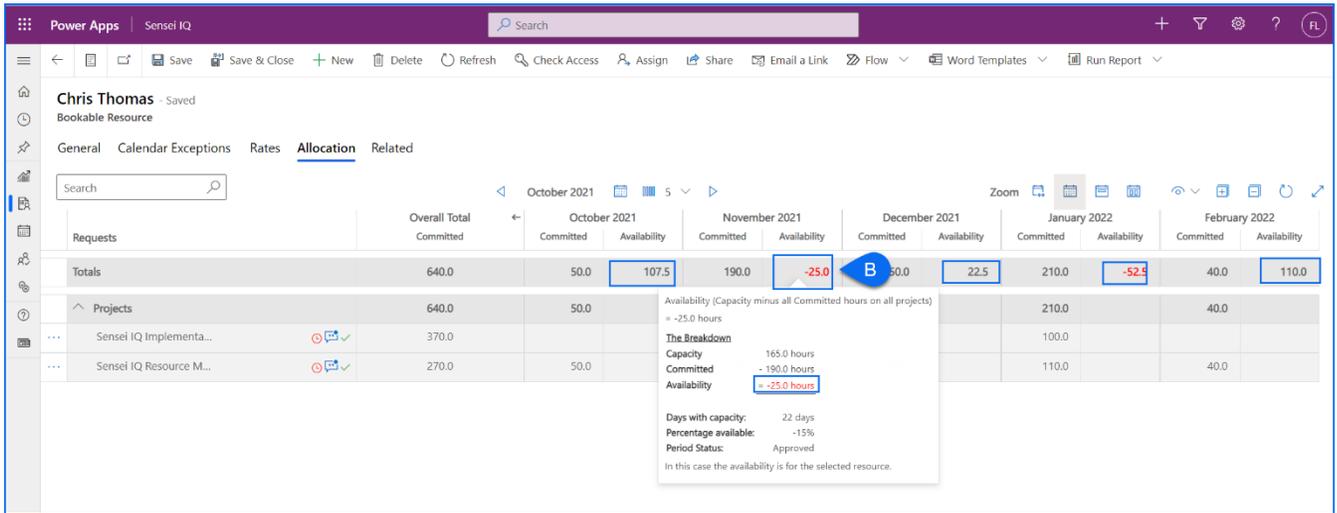
a. Select a project name row where the overallocation indicator appears and review the **attached comments** on each request for contextual information.

Sensei IQ Resource Management Implementation...
Comments for Chris Thomas

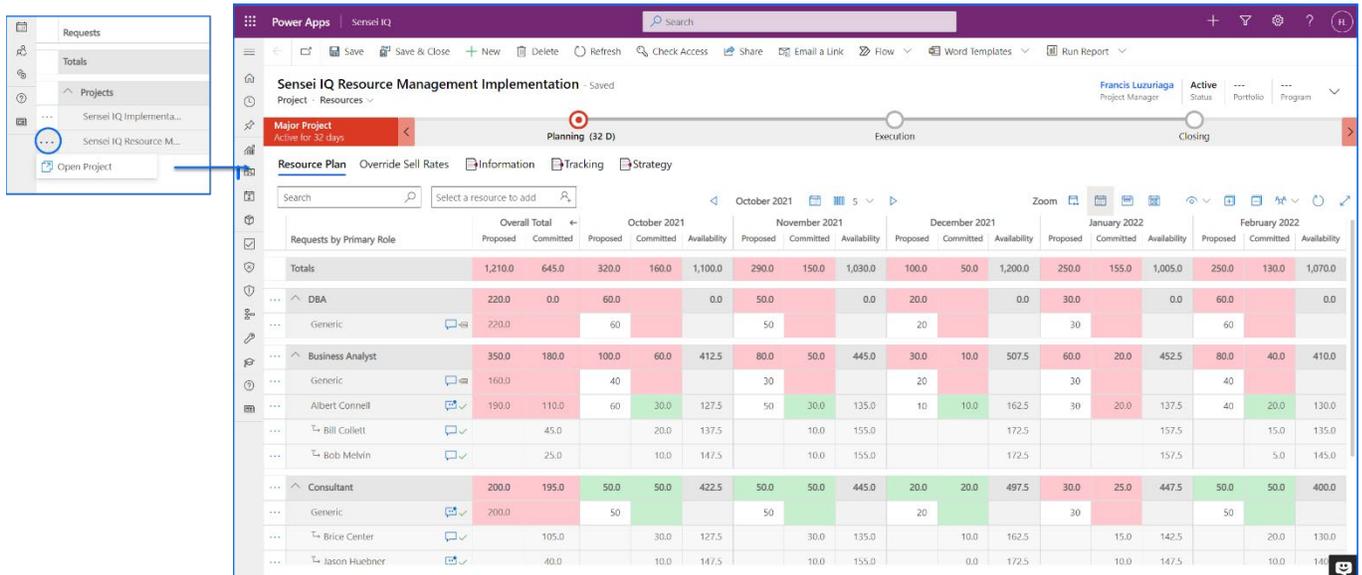
- Francis Luzuriaga (Oct 8): I have increased the requested effort for Chris Thomas for November from 40 hours to 50 hours due to a change in scope.
- Francis Luzuriaga (Oct 26): All proposed work for Chris in this project have been approved without any amendment from original request.
- Francis Luzuriaga (Oct 27): Over allocated in this view! he committed work of Chris in November from 50 to 30 hours as he will be away on leave for 3 days as per conversation.
- Francis Luzuriaga (Nov 3): We have to discuss how we can balance the workload of Chris Thomas in November 2021 and January 2022.



- b. Hide the comments and evaluate the overall remaining availability of the named resource, particularly where a **negative red** value appears in the **Availability** column or the **tooltip text** when you hover the mouse over each visible period.



Tip: If you want to further understand the allocation of the named resources across a particular project, you can click the **Row Menu** button (...) in front of the project name and then the **Open Project** button to access the **Resource Plan** tab of the selected project in a separate window.



- c. Attach **comments** to the resource request of the project/s with **overalllocation** to balance the resource workload with the respective project managers by either reallocating a portion of the committed work to someone else and/or moving it to another period when the allocated resource has more availability (**recommended**).

Chris Thomas - Saved
Bookable Resource

General Calendar Exceptions Rates **Allocation** Related

Search

Sensei IQ Resource Management Implement...
Comments for Chris Thomas

Francis Luzuriaga Oct 8
I have increased the requested effort for Chris Thomas for November from 40 hours to 50 hours due to a change in scope.

Francis Luzuriaga Oct 26
All proposed work for Chris in this project have been approved without any amendment from original request.

Francis Luzuriaga Oct 27
I have reduced the committed work of Chris in November from 50 to 30 hours as he will be away on leave for 3 days as per conversation.

We have to discuss how we can balance the workload of Chris Thomas in November 2021 and January 2022.

	December 2021		January 2022		February 2022		March 2022	
	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Capacity	5.0							
	150.0	22.5	210.0	-52.5	40.0	110.0		172.5
	150.0		210.0		40.0			
	130.0		100.0					
	20.0		110.0		40.0			

Tip: Once the resource overallocation is identified, you can resolve, if not minimize, the overallocation in agreement with the respective project managers by following the steps outlined in section **3. Modify an existing fulfilled request for named resources** from a related downloadable titled [JOB AID - Reviewing and approving resource requests](#).

Identify resource allocation from the Resource Plan tab

1. SET THE RESOURCE PLAN HORIZON

- Ensure you are in the **Project** area and click **Projects** in the **Leadership** section.
- Open the project record then expand the **Resource** segment and navigate to the **Resource Plan** tab.

The screenshot shows the 'Resource Plan' tab with the following data table:

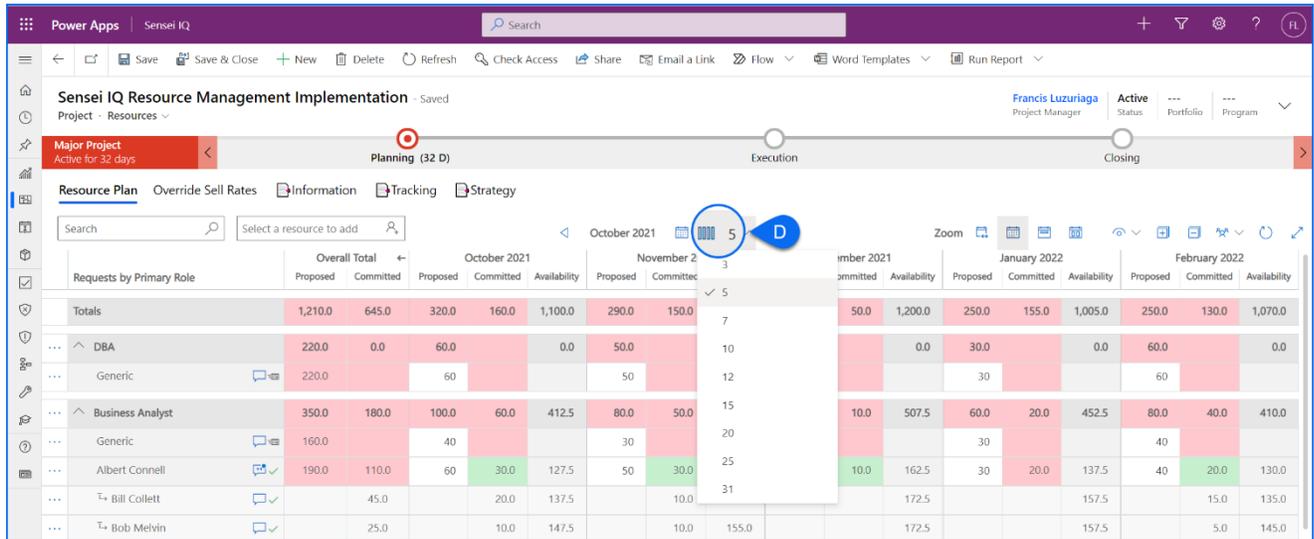
Requests by Primary Role	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022	
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed
Totals	1,210.0	645.0	320.0	160.0	1,100.0	290.0	150.0	1,030.0	100.0	50.0	1,200.0	250.0	155.0	1,005.0	250.0	130.0
DBA	220.0	0.0	60.0		0.0	50.0		0.0	20.0		0.0	30.0		0.0	60.0	
Generic	220.0		60			50			20			30			60	
Business Analyst	350.0	180.0	100.0	60.0	412.5	80.0	50.0	445.0	30.0	10.0	507.5	60.0	20.0	452.5	80.0	40.0
Generic	160.0		40			30			20			30			40	
Albert Connell	190.0	110.0	60	30.0	127.5	50	30.0	135.0	10	10.0	162.5	30	20.0	137.5	40	20.0
Bill Collett		45.0		20.0	137.5		10.0	155.0			172.5			157.5		15.0
Bob Melvin		25.0		10.0	147.5		10.0	155.0			172.5			157.5		5.0
Consultant	200.0	195.0	50.0	50.0	422.5	50.0	50.0	445.0	20.0	20.0	497.5	30.0	25.0	447.5	50.0	50.0
Generic		200.0		50			50			20		30			50	
Brice Center		105.0		30.0	127.5		30.0	135.0		10.0	162.5		15.0	142.5		20.0
Jason Huebner		40.0		10.0	147.5		10.0	155.0			172.5		10.0	147.5		

- Change the selected **date** for the first period that you want to review the resource planning from.

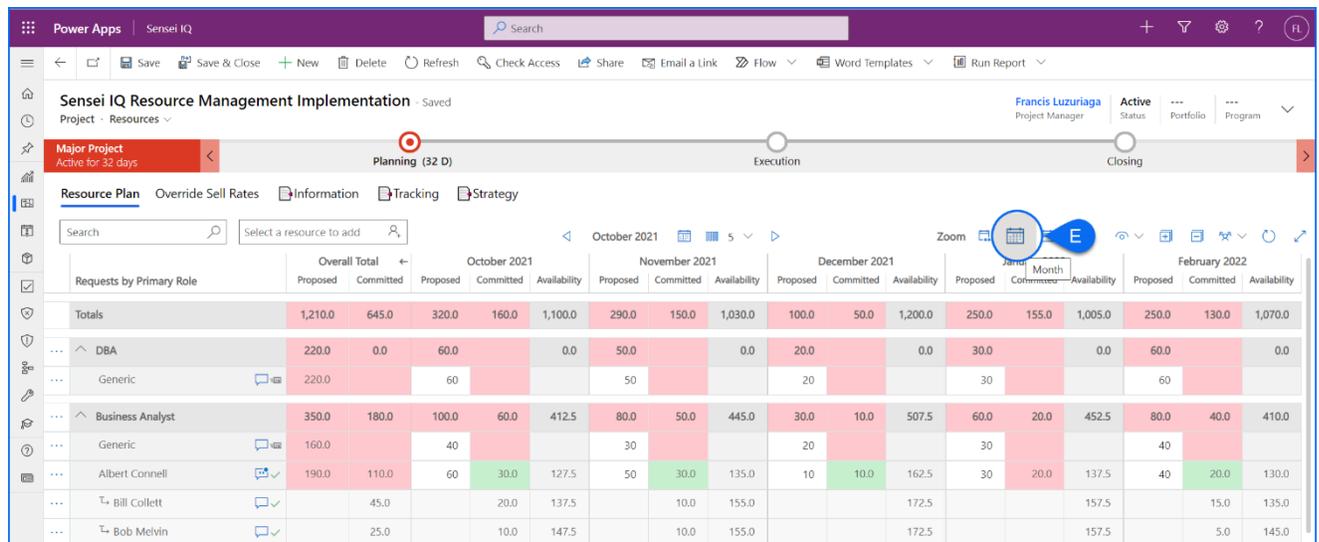
The screenshot shows the 'Resource Plan' tab with a calendar view overlay. The calendar is set to October 2021, and the date '1' is selected. The underlying data table is partially visible behind the calendar.



d. Set the number of **periods** you want to be visible on the page.



e. Set the **timescale** of the requested period using the **Zoom** feature.



f. Ensure that only **Show Committed**, **Show Availability**, **Show Overall Row Totals** and **Show Full Column Heading** options are selected from the **View Options** menu.



The screenshot shows the Sensei IQ Resource Management Implementation interface. The main table displays resource requests by primary role across months from October 2021 to January 2022. A context menu is open over the 'Expand All' button, listing options such as 'Show Proposed', 'Show Committed', 'Show Availability', 'Show Overall Row Totals', 'Hide Total Columns', and 'Show Full Column Heading'.

Requests by Primary Role	Overall Total Committed	October 2021		November 2021		December 2021		January 2022		Availability
		Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	
Totals	645.0	160.0	1,100.0	150.0	1,030.0	50.0	1,200.0	155.0	1,005.0	1,070.0
DBA	0.0		0.0		0.0		0.0		0.0	0.0
Generic										
Business Analyst	180.0	60.0	412.5	50.0	445.0	10.0	507.5	20.0	452.5	410.0
Generic										
Albert Connell	110.0	30.0	127.5	30.0	135.0	10.0	162.5	20.0	137.5	130.0
Bill Collett	45.0	20.0	137.5	10.0	155.0		172.5		157.5	135.0
Bob Melvin	25.0	10.0	147.5	10.0	155.0		172.5		157.5	145.0
Consultant	195.0	50.0	422.5	50.0	445.0	20.0	497.5	25.0	447.5	400.0
Generic										
Brice Center	105.0	30.0	127.5	30.0	135.0	10.0	162.5	15.0	142.5	130.0
Jason Huebner	40.0	10.0	147.5	10.0	155.0	0.0	172.5	10.0	147.5	140.0

g. Click the **Expand All** button to display the second level of rows outlining the resources under each primary role row.

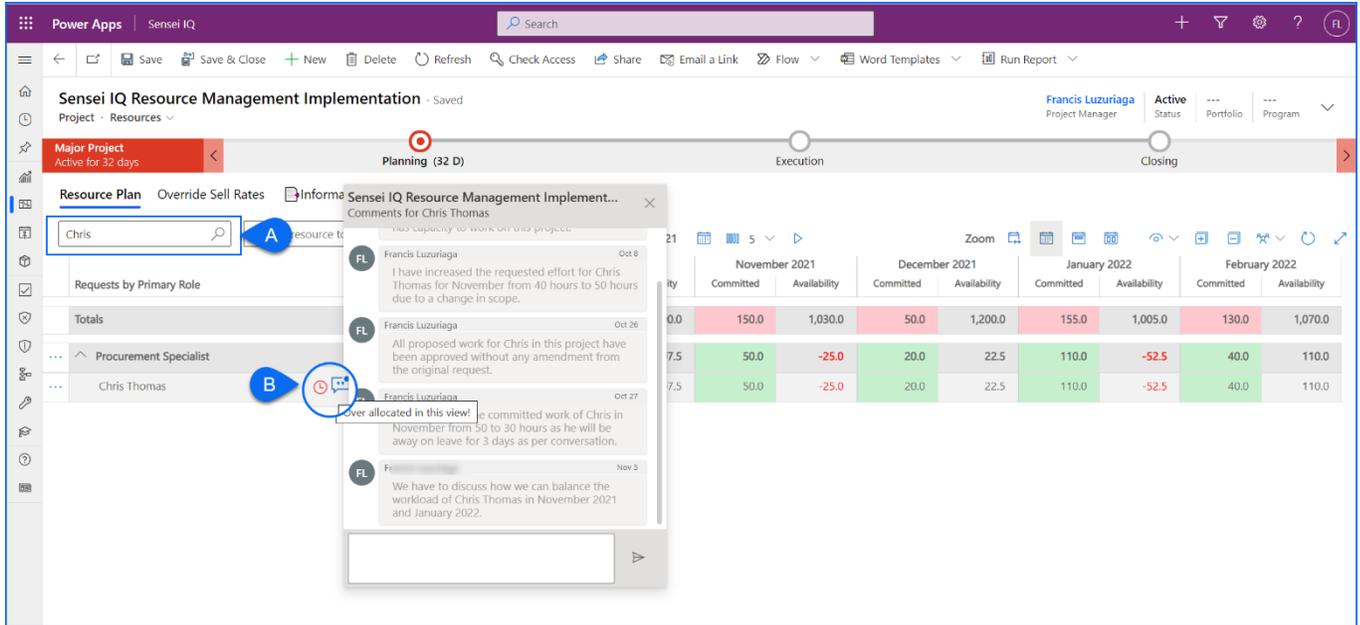
The screenshot shows the same Sensei IQ Resource Management Implementation interface, but with the 'Expand All' button highlighted. The table now displays a second level of rows, showing individual resources under each primary role.

Requests by Primary Role	Overall Total Committed	October 2021		November 2021		December 2021		January 2022		Availability
		Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	
Totals	645.0	160.0	1,100.0	150.0	1,030.0	50.0	1,200.0	155.0	1,005.0	1,070.0
DBA	0.0		0.0		0.0		0.0		0.0	0.0
Generic										
Business Analyst	180.0	60.0	412.5	50.0	445.0	10.0	507.5	20.0	452.5	410.0
Generic										
Albert Connell	110.0	30.0	127.5	30.0	135.0	10.0	162.5	20.0	137.5	130.0
Bill Collett	45.0	20.0	137.5	10.0	155.0		172.5		157.5	135.0
Bob Melvin	25.0	10.0	147.5	10.0	155.0		172.5		157.5	145.0
Consultant	195.0	50.0	422.5	50.0	445.0	20.0	497.5	25.0	447.5	400.0
Generic										
Brice Center	105.0	30.0	127.5	30.0	135.0	10.0	162.5	15.0	142.5	130.0
Jason Huebner	40.0	10.0	147.5	10.0	155.0	0.0	172.5	10.0	147.5	140.0

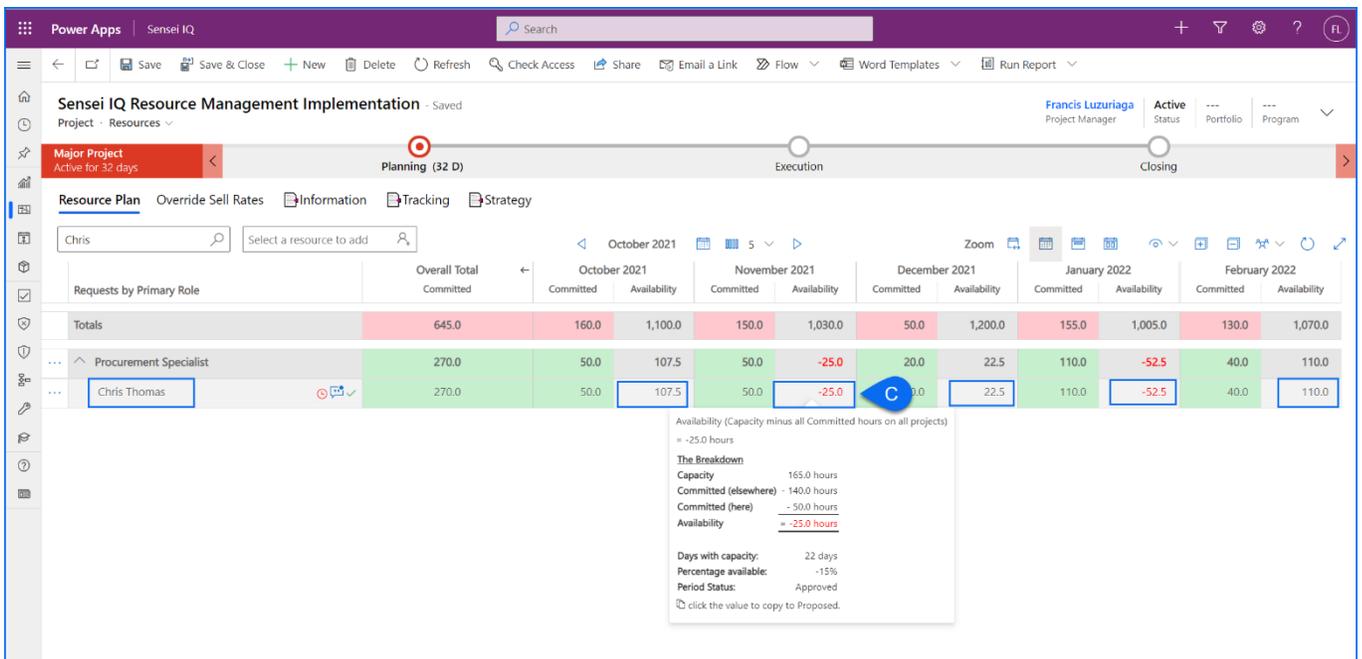


2. EVALUATE WORK ALLOCATION VERSUS AVAILABILITY OF NAMED RESOURCES

- a. Use the **Search** field to look up the named resource from the **Resource Plan** screen.
- b. Pick the named resource from the search results displayed on the page and review the **attached comments** where the overallocation indicator appears for contextual information.



- c. Hide the comments and evaluate the overall remaining availability of the named resource under its **Primary Role** row, particularly where a **negative red** value appears in the **Availability** column or the **tooltip text** when you hover the mouse over each visible period.



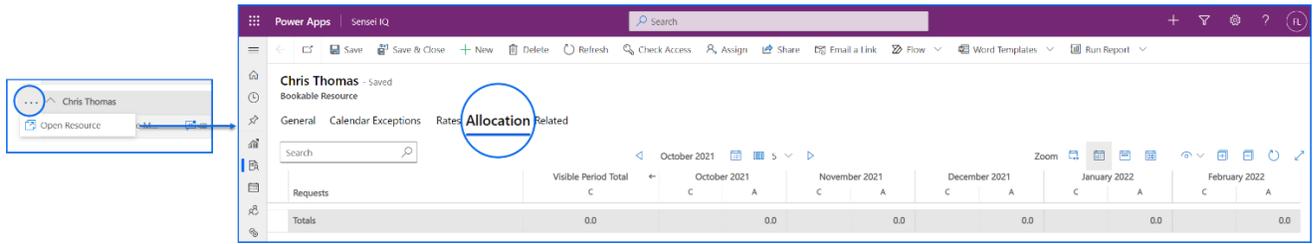


Important: The overall availability is calculated from the overall resource capacity for the visible period minus the total committed hours on all projects where the breakdown of which is also displayed in the tooltip text.

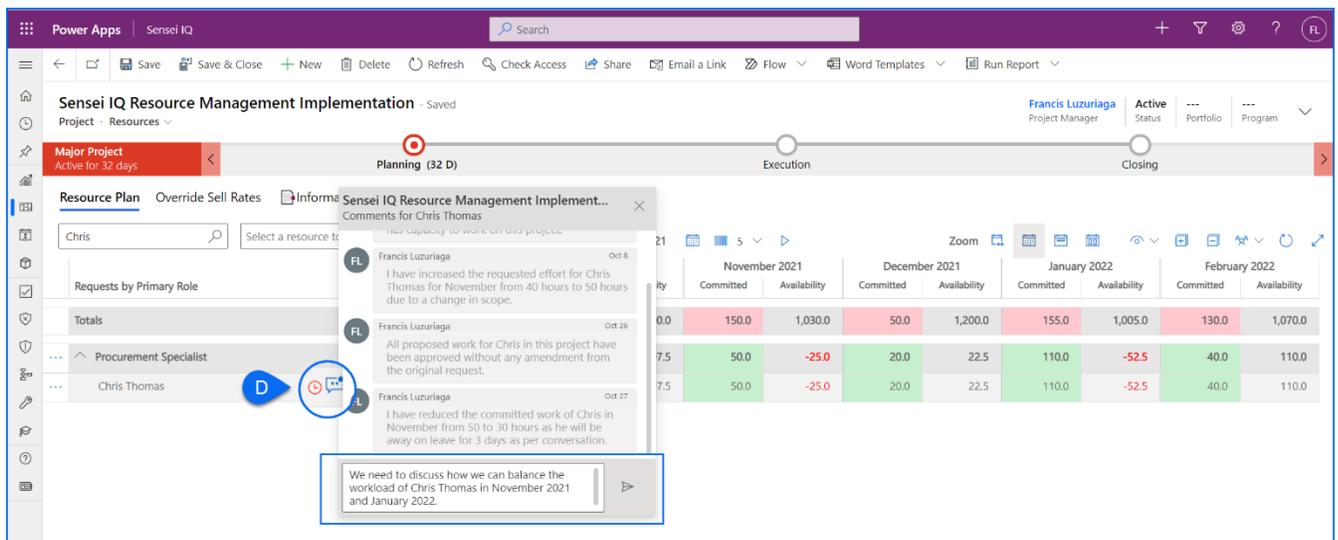
Period	Committed	Availability	Committed	Availability
November 2021	150.0	1,030.0	50.0	1,070.0
December 2021	50.0	1,030.0	50.0	1,070.0
January 2022	50.0	1,030.0	50.0	1,070.0

The Breakdown	
Capacity	165.0 hours
Committed (elsewhere)	140.0 hours
Committed (here)	50.0 hours
Availability	25.0 hours

Tip: If you want to further understand the allocation of the selected named resource across other projects, you can click the **Primary Role Menu** button (...) in front of the primary resource role name and then the **Open Resource** button to access the **Allocation** tab of the named resource in a separate window.



- d. Attach **comments** to the resource request of the project/s with **overalllocation** to balance the resource workload with the respective project managers by either reallocating a portion of the committed work to someone else and/or moving it to another period when the allocated resource has more availability (**recommended**).



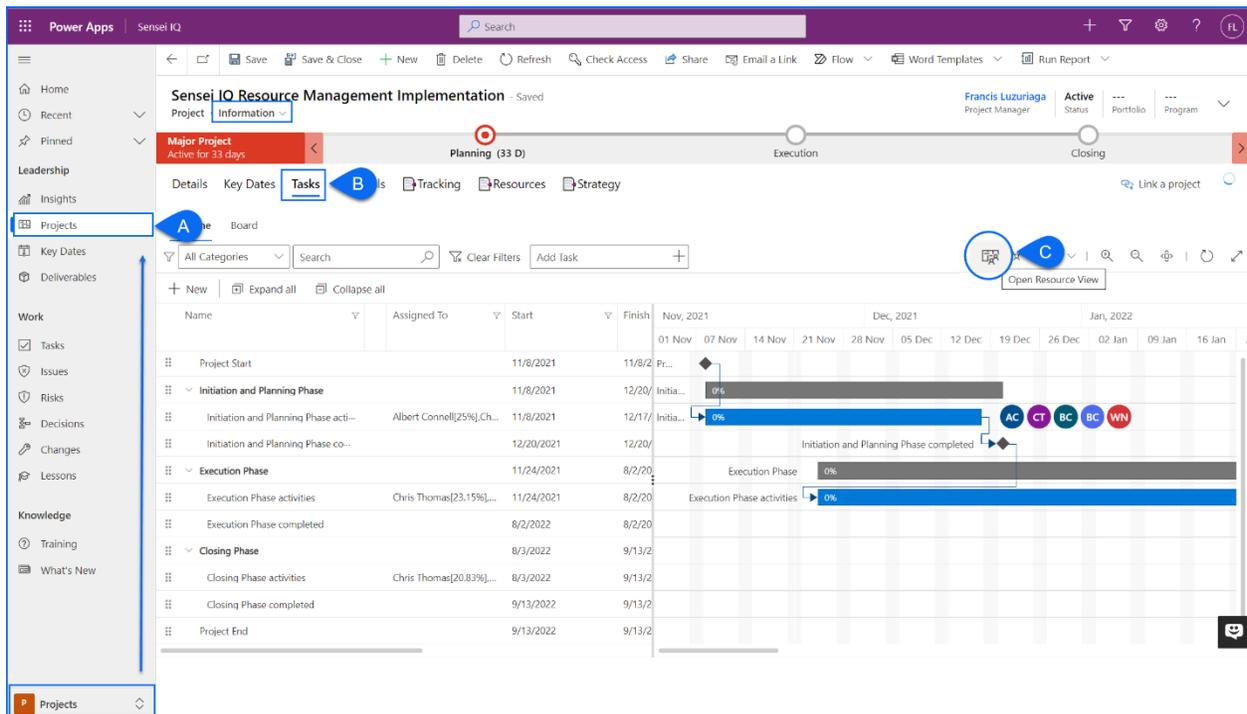


Tip: Once the resource overallocation is identified, you can resolve, if not minimize, the overallocation in agreement with the respective project managers by following the steps outlined in section **3. Modify an existing fulfilled request for named resources** from a related downloadable titled [JOB AID - Reviewing and approving resource requests](#).

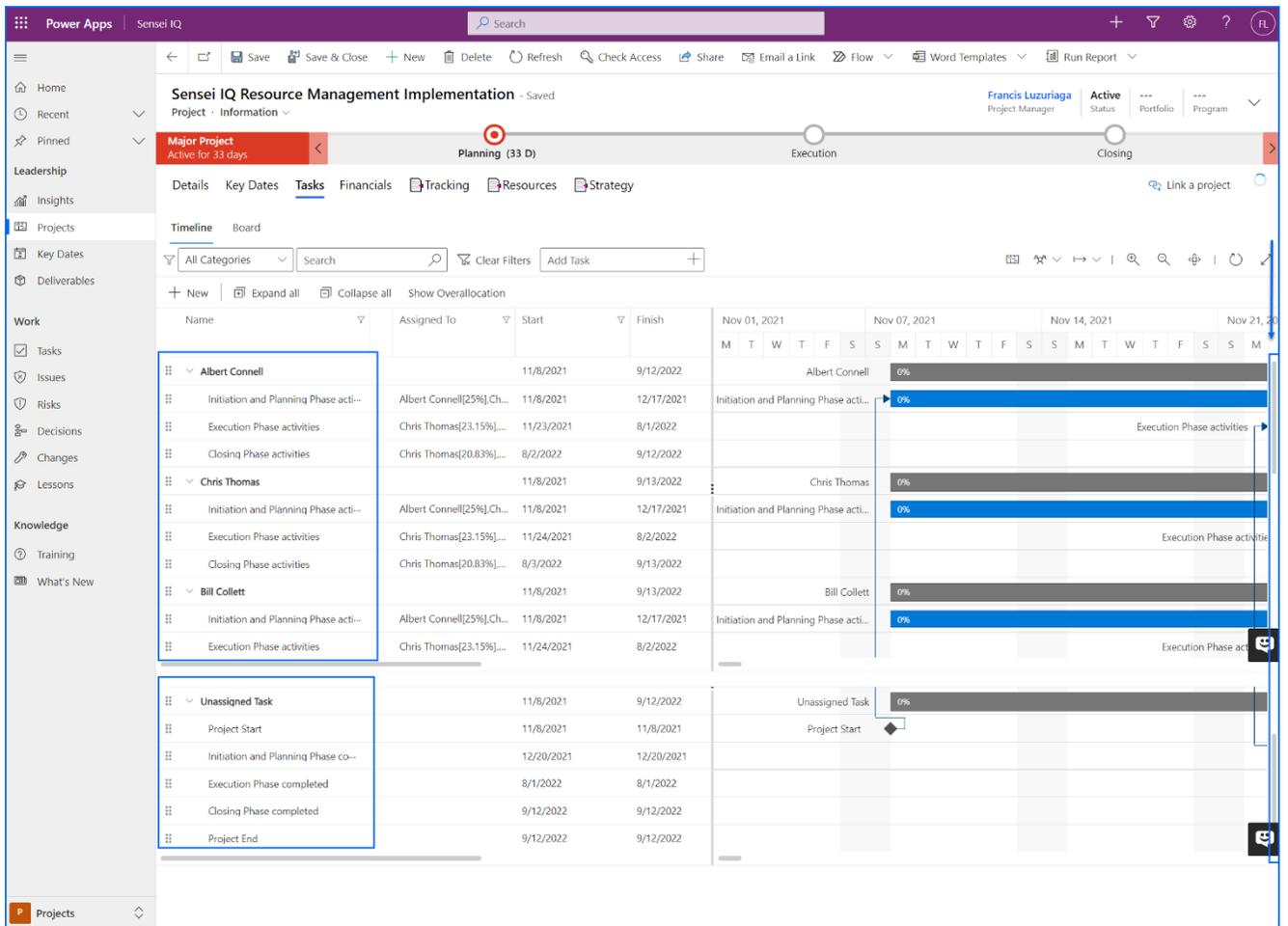
Identify resource allocation from the Resource View

1. APPLY THE RESOURCE VIEW IN THE PROJECT PLAN

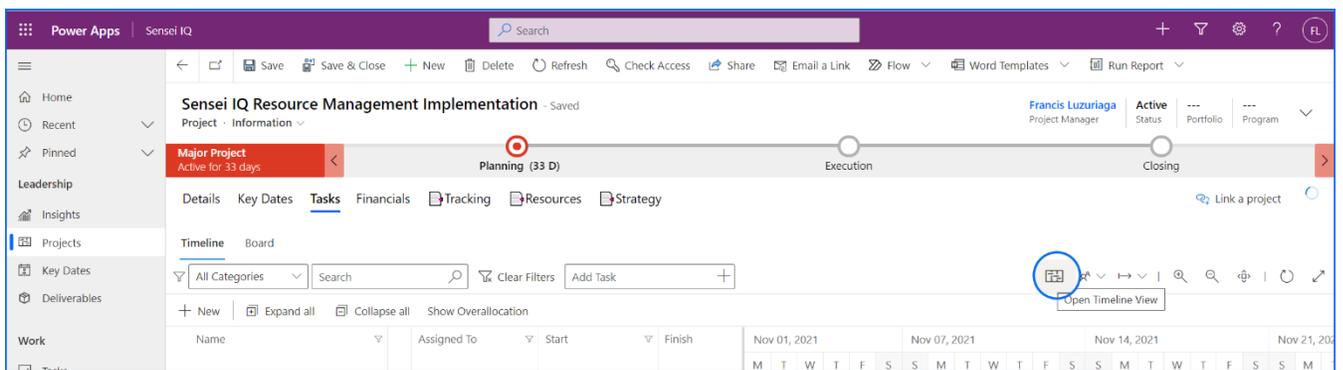
- a. Ensure you are in the **Project** area and click **Projects** in the **Leadership** section.
- b. Open the project record then navigate to the **Tasks** tab of the **Information** segment.
- c. Select the **Open Resource View** option from the command bar above the Gantt chart window to apply the **Resource View** on the page.



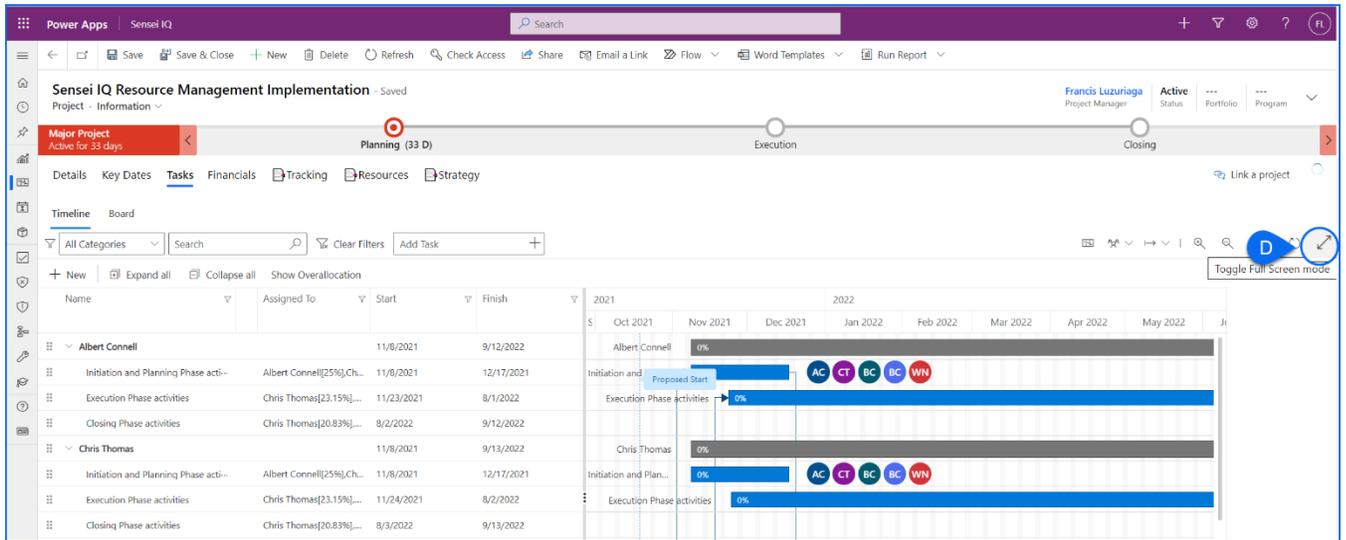
Important: The **Resource View** switches the default **Timeline View** displaying a *work breakdown structure* to a *resource breakdown view* with a Gantt chart that visualizes the list of tasks assigned to each resource in a hierarchical manner on task editing mode. Use the vertical scroll bar to view the tasks that are not assigned to any resources displayed under the **Unassigned Task** category which also includes milestone tasks that are not normally assigned to resources in the project plan.



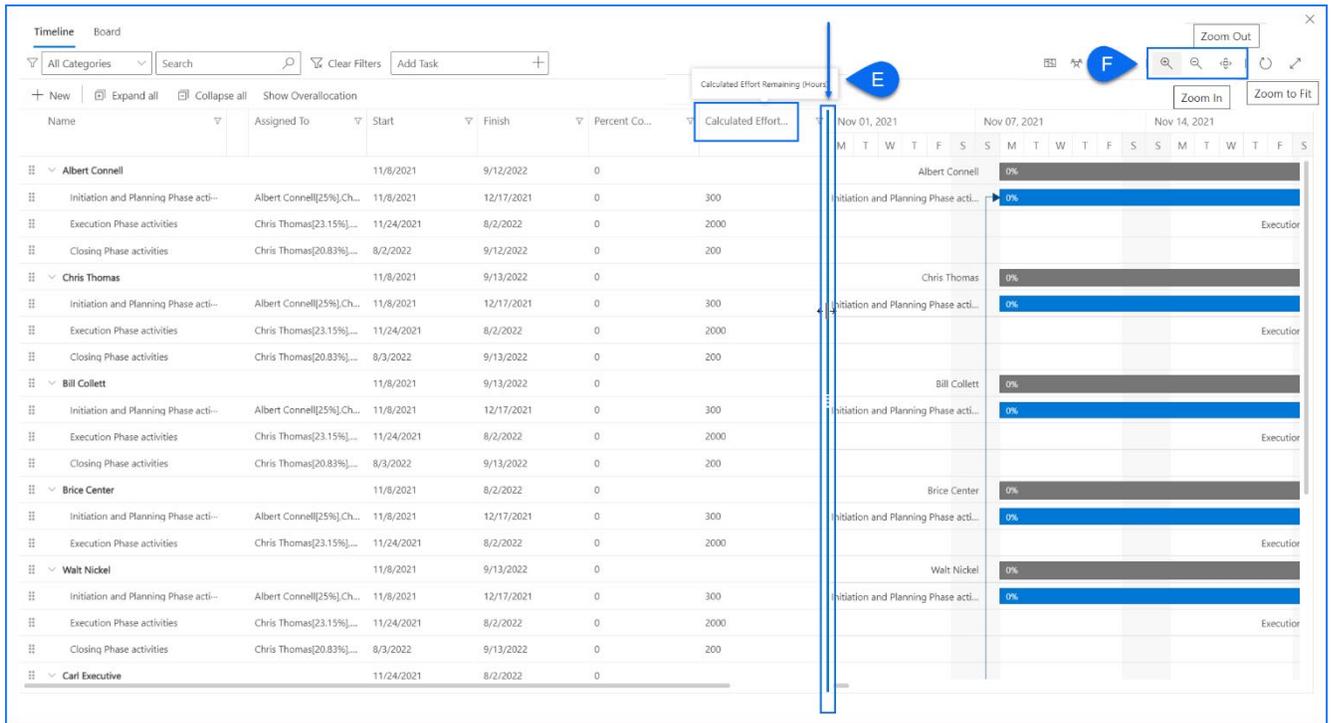
Tip: Selecting the **Open Timeline View** option from the command bar switches the **Resource View** back to the default view displaying the *work breakdown structure* and a Gantt chart.



d. Enable the **Toggle Full Screen Mode** option to switch the **Resource View** screen to focus mode.



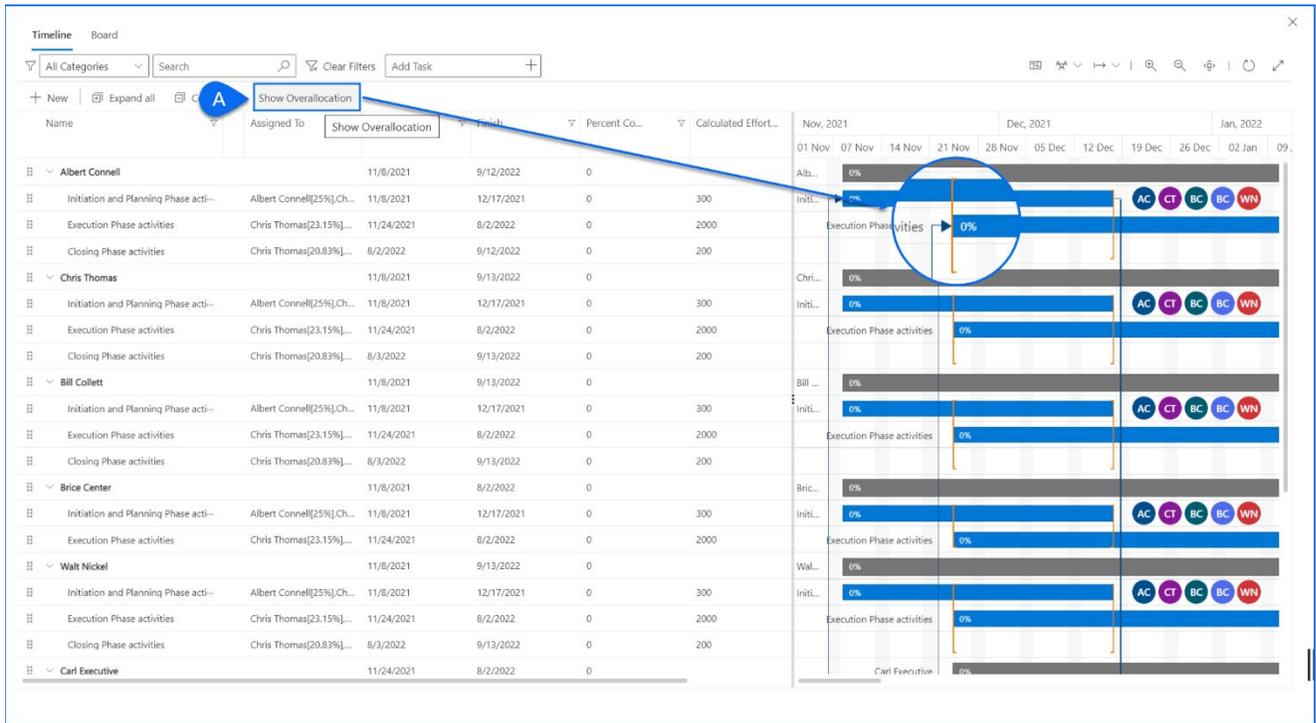
- e. Drag the **vertical splitter bar** and drop it to the right edge of the **Calculated Effort Remaining Hours** ensuring that the Gantt chart remains visible on the other half of the screen.
- f. Use the **Zoom In, Zoom Out** or **Zoom to Fit** buttons to control the timescale of the Gantt chart displayed on the right-hand side of the screen.





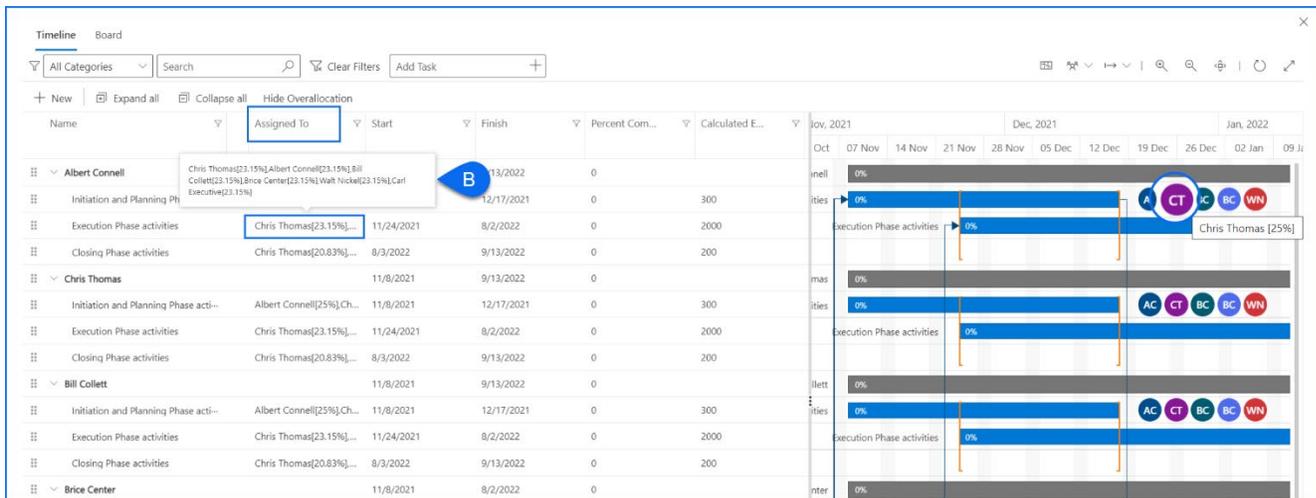
2. EVALUATE WORK ASSIGNMENTS OF NAMED RESOURCES

a. Click the **Show Overallocation** button from the command bar above the resource breakdown table.



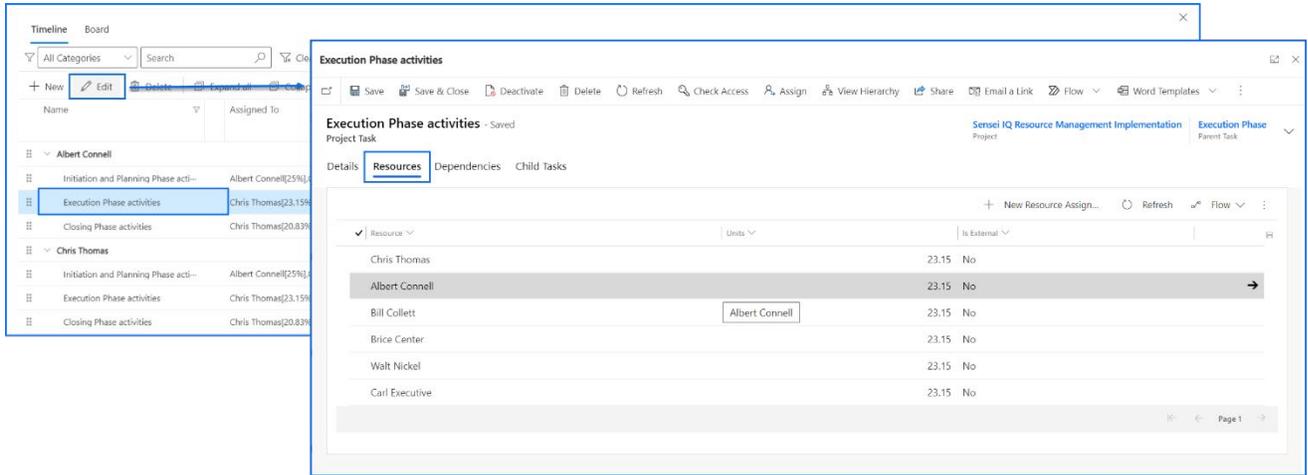
Important: When a resource is assigned with two or more tasks which are scheduled on the same date or period, effectively **overlapping work assignments** (regardless of the *target utilization rate*, *calculated effort*, *resource capacity*, and *committed work by the line manager*), it is automatically displayed as **resource overallocation** in the project plan. The date ranges with resource overallocation are highlighted with a **red** square bracket in the Gantt chart on the right-hand side of the screen.

b. To investigate the resource overallocation against a work assignment, either hover the mouse over the names displayed in **Assigned To** column of the current view or over the initials of each named resource displayed at the end of the Gantt chart bar where overallocation is displayed.





Tip: Alternatively, highlighting the work assignment of the resource that is causing the overallocation then clicking the **Edit** button from the command bar displays the **Task Information** dialog box where the user can access the list of named resources assigned to the task with their calculated rate of utilization displayed in the **Units** column of the **Resources** tab.

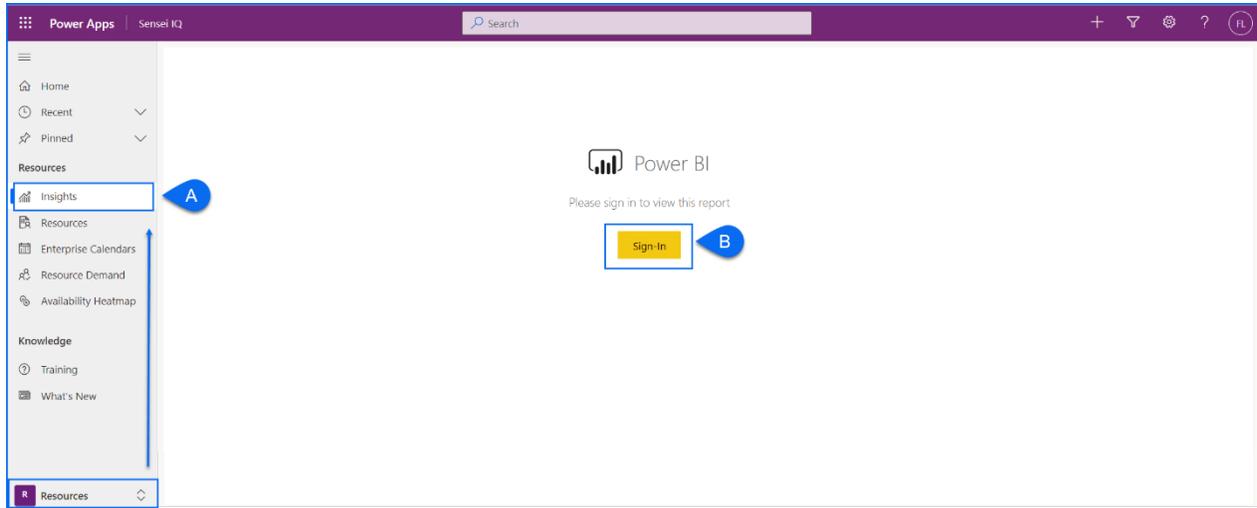


Important: It is important to remember that the **project plan** where tasks with effort estimates are assigned to allocated named resources (*work assignments*) is **not** controlled by the **resource plan** where *committed hours* from approved resource requests are allocated to named resources. Depending on your organizational rules, the project manager may be required to consistently optimize the project plan (*schedule*), cut scope, or negotiate for additional resources or changed dates to ensure that calculated total effort from the *work assignments* in the project plan remains aligned to the *committed hours* approved by the respective line managers recorded in the **Resource Plan** tab.

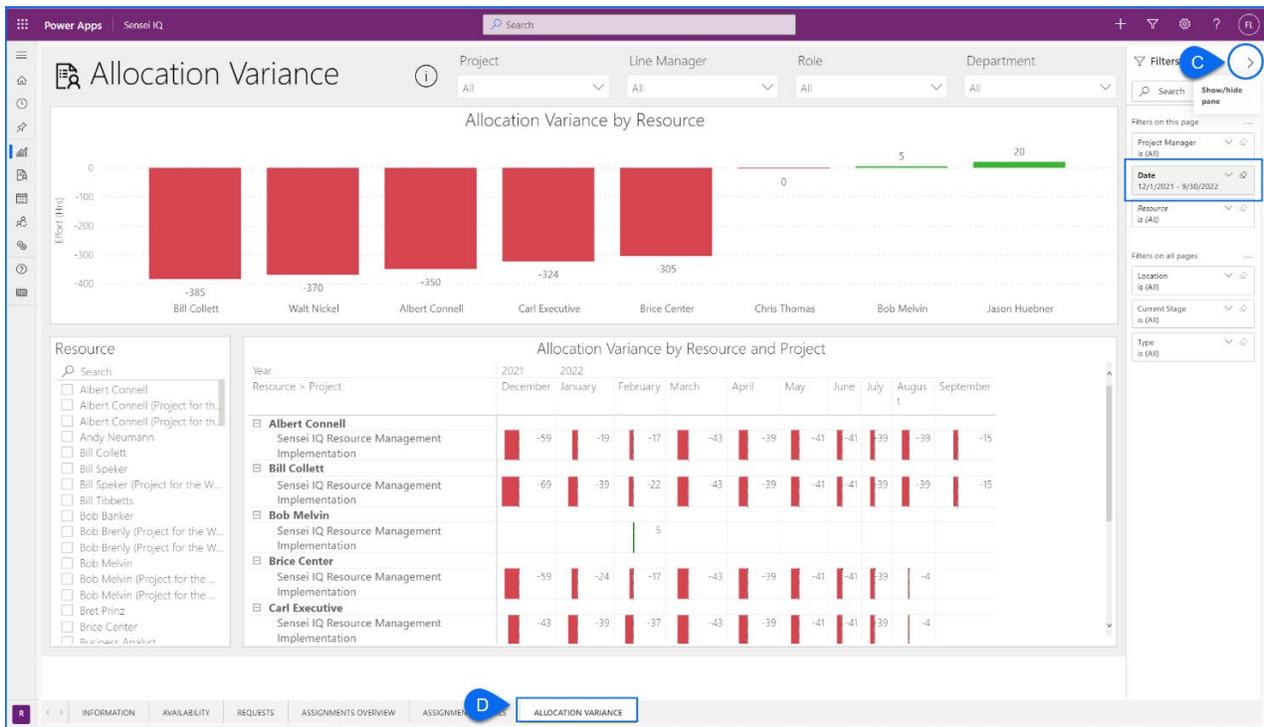
Identify resource allocation variance from Insights

1. SET THE FILTERS IN THE ALLOCATION VARIANCE REPORT PAGE

- a. Ensure that you are in the **Resources** area and click **Insights** in the **Resources** section.
- b. Click the **Sign-in** button (if prompted) to load the pre-configured Power BI report on the page.

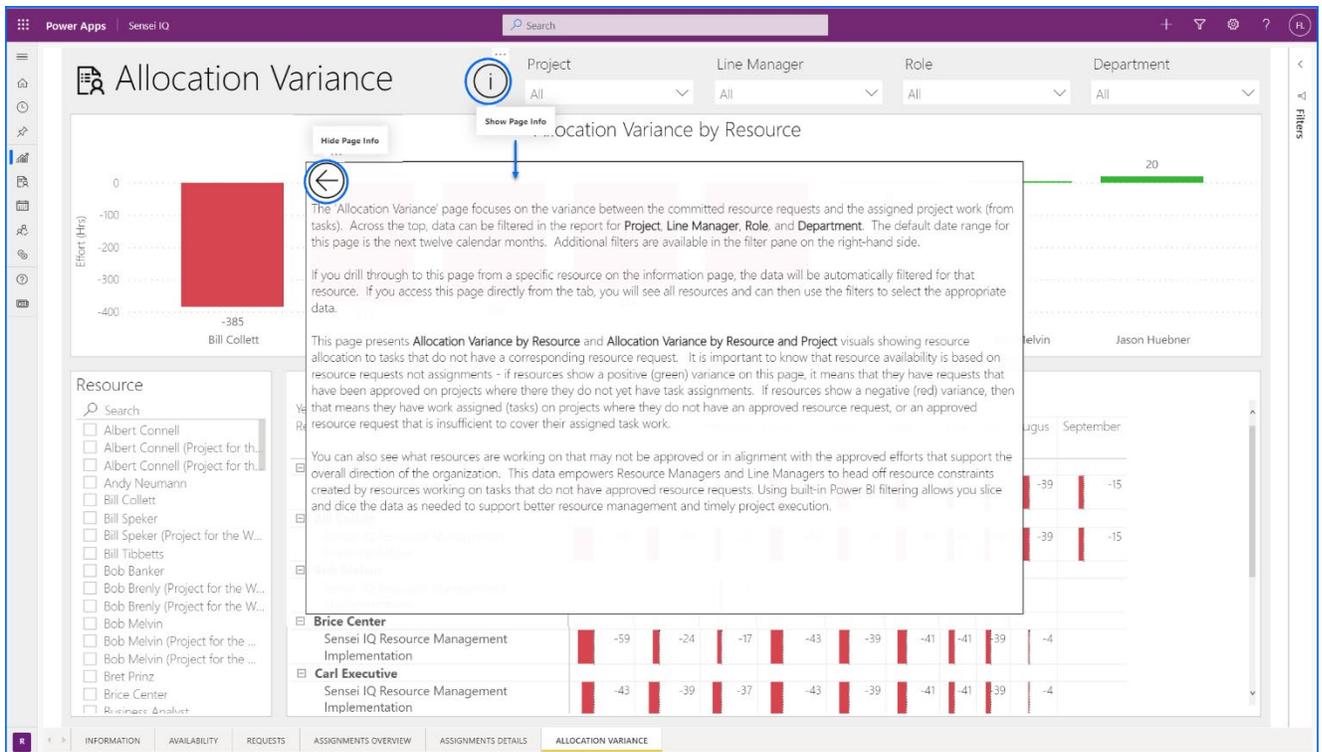


- d. Click the **Show/Hide pane** chevron button to display the **Filters** pane on the right-hand side and validate the **date** range of the data displayed on the page

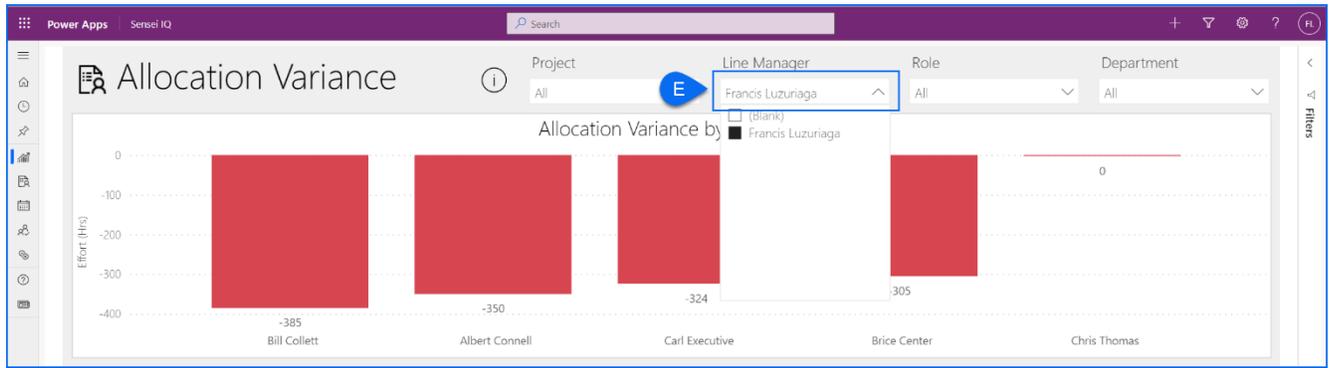


Important: The default date range for this page is the next twelve (12) calendar months.

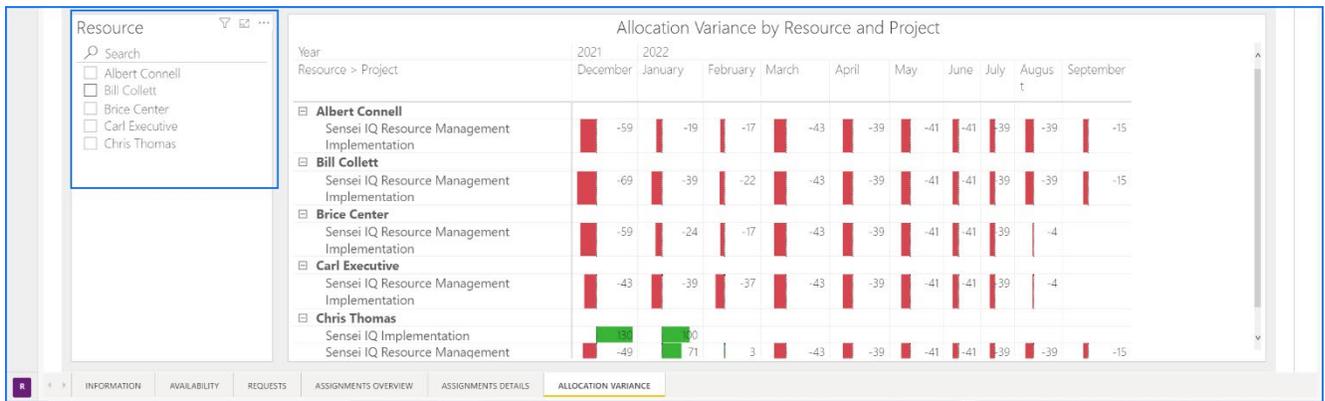
Tip: Clicking the **Show Page Info** button on each report page allows the user to view a description of the report page (**recommended**).



e. Select a name from the **Line Manager** filter to display only named resources that the user is the line manager for.

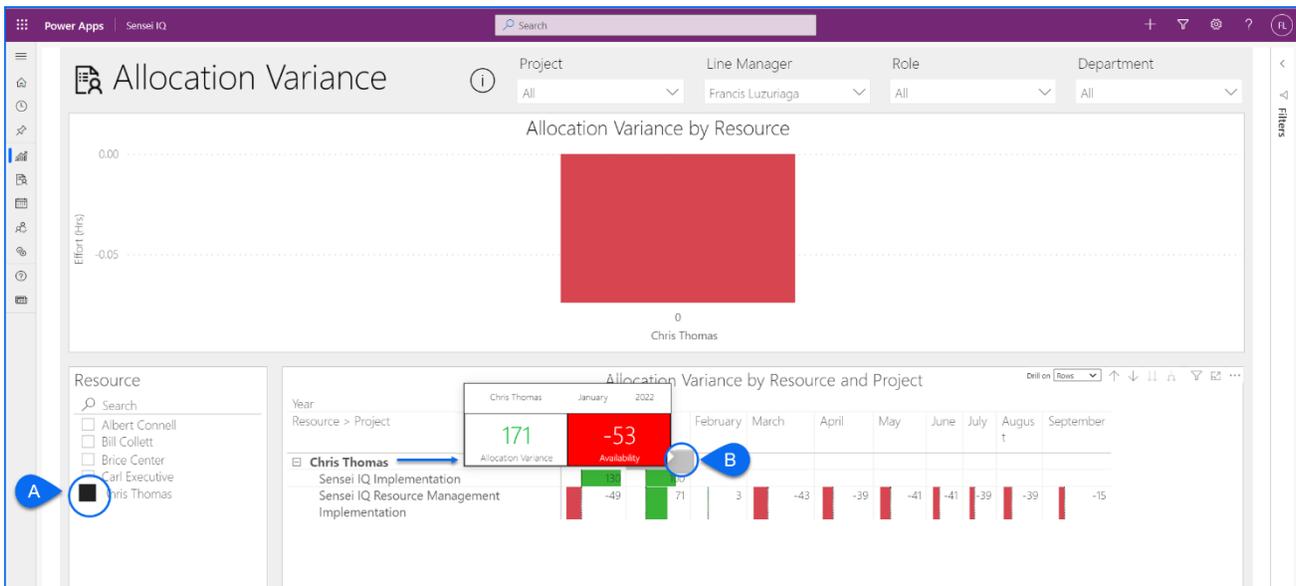


Tip: Across the top of the page, data can also be filtered in the report by **Project**, **Role** and/or **Department**. Additionally, you can use the **Resource** filter on the left-hand side of the screen to select named resource/s to focus on.



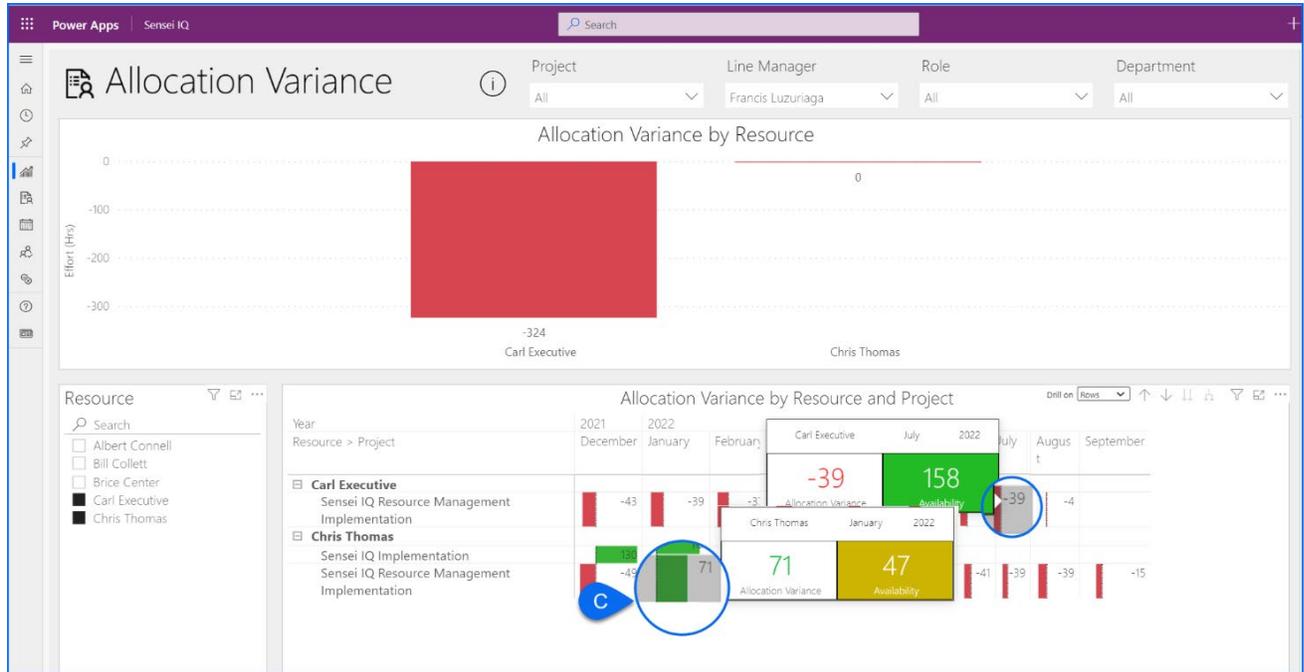
2. EVALUATE ALLOCATION VARIANCE OF NAMED RESOURCES

- a. Ensure that you have selected a named resource to evaluate the allocation variance of in the **Resource** filter.
- b. From the **Allocation Variance by Resource and Project** visuals, hover the mouse over the **blank cell** across the named resource row for each visible period to display the **tooltip visual** that reveals the following insights:
 - Name of the bookable resource
 - Highlighted period in the timescale
 - Allocation variance for the period (i.e., *total committed work in the resource plans versus total calculated effort from assignments in the project plan*)
 - Availability for the period (i.e., *overall resource capacity for the period versus total committed work in the resource plans*)



Important: The **Allocation Variance by Resource and Project** visual shows the resource allocation to tasks in the project plan that do not have a corresponding approved request in the resource plan. It is also important to know that resource availability is based on the approved resource requests (*committed hours*) in the resource plan, **not** work assignments from the project plan.

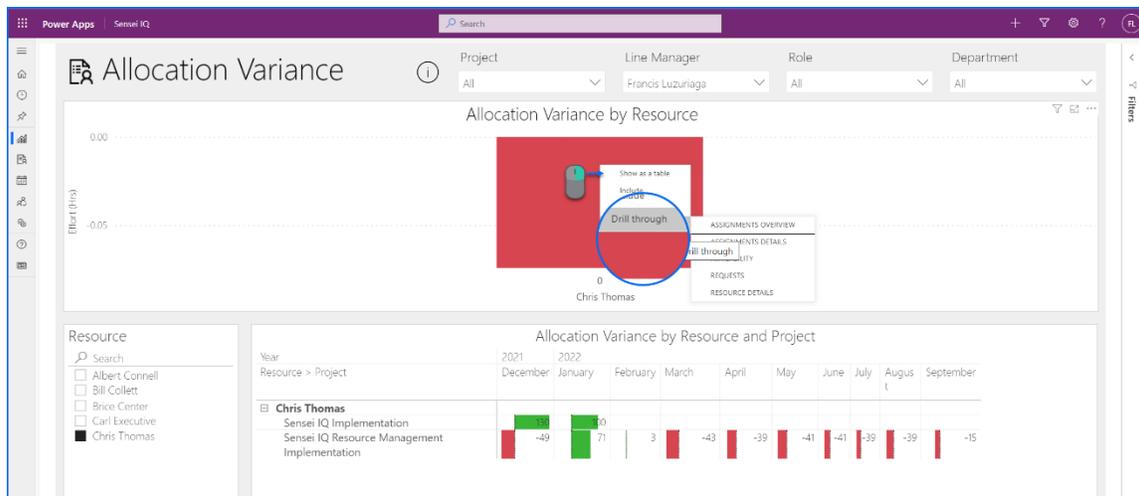
- c. Next, hover the mouse over the cells with **positive values** (highlighted in **green**) or **negative values** (highlighted in **red**) across the project name row under a named resource row for each visible period to display the **tooltip visual** that reveals the following insights:
- Name of the bookable resource
 - Highlighted period in the timescale
 - Allocation variance for the period (i.e., *total committed work in the resource plan of the highlighted project versus total calculated effort from assignments in the project plan*)
 - Availability for the period (i.e., *overall resource capacity for the period versus total committed work in the resource plan of the highlighted project*)

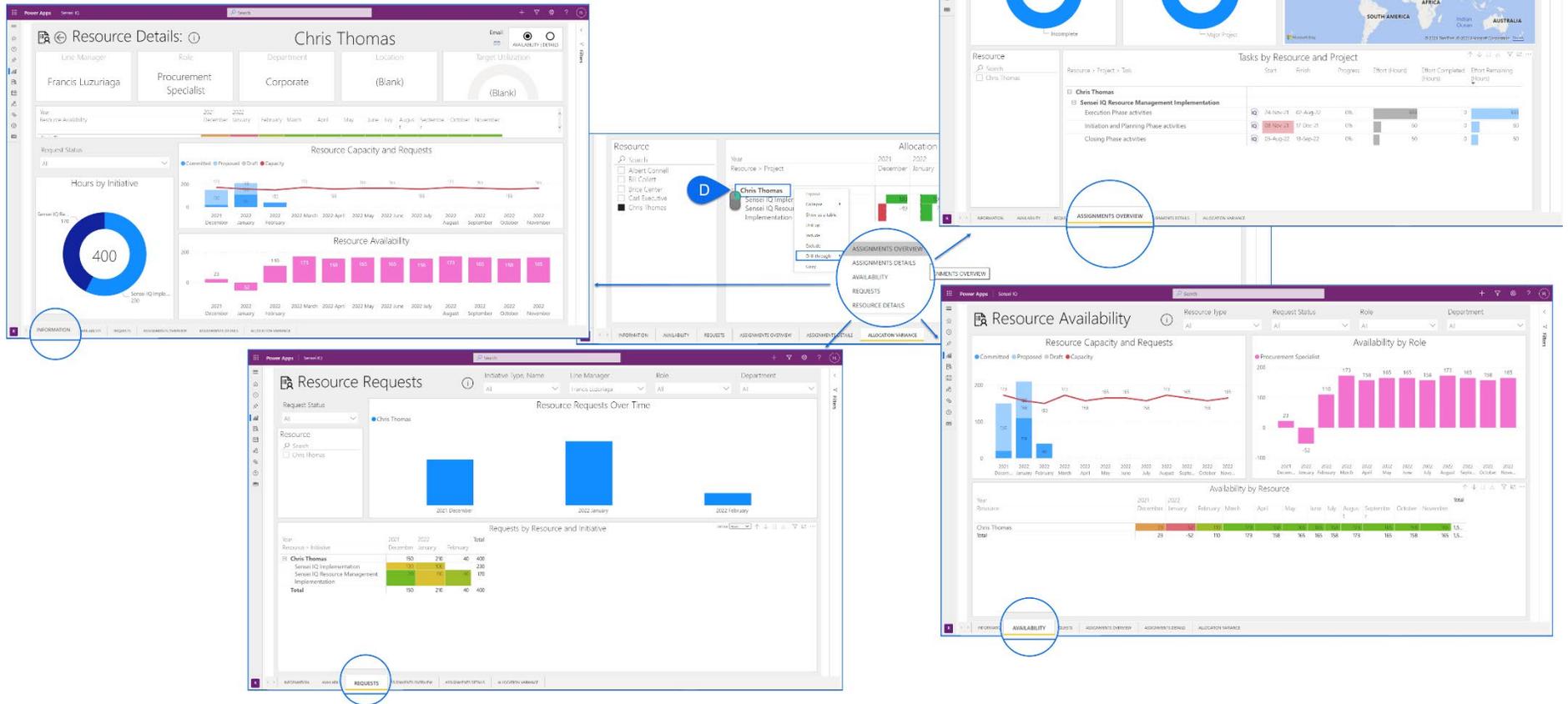


Tip: If the resource allocation shows a **positive green** variance against the project for the highlighted period, it means that they have resource requests that have been approved on the project’s resource plan where they do not yet have task work assigned to them (*work assignments*) in the project plan. If the resource allocation shows a **negative red** variance, then that means they have tasks assigned (*work assignments*) in the project plan where they do not have an approved resource request, or an approved resource request in the project’s resource plan that is insufficient to cover their assigned task work in the project plan.

- d. If you want to further investigate on the allocation variance, right-click on the named resource from the **Allocation Variance by Resource and Project** visual and select a report page from the **Drill through** options depending on your area of interest.

Tip: Alternatively, right-clicking on the chart bar from the **Allocation Variance by Resource** visual also reveals the same **Drill through** options.





Tip: If you drill through to each of these report pages from the **Allocation Variance** report page, the data will be automatically filtered for that selected resource only across the selected page from the **Drill through** options.

Important: Depending on your organizational rules, the line managers may have to use such insights from the **Allocation Variance** report page to regularly work with the respective project managers and ensure that their project plans (*schedules*) are constantly optimized, or additional resources and/or changed dates are re-negotiated so that resources are **not** working on project tasks that may not be approved or in alignment with the approved efforts that support the overall direction of the organization. Additionally, this allows line managers to head off resource constraints created by resources working on tasks that do not have approved resource requests for better resource management and timely project execution.