

## 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 <u>3. Modify an existing fulfilled request for</u> <u>named resources</u> from a related downloadable titled <u>JOB AID - Reviewing and approving resource requests.</u>

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

#### Resource Manager

Resources > Resources > 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.

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

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

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

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

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**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)

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**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.

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**Important:** This *read-only* report displays the committed work and availability of <u>all</u> 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.

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

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- 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.

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

**IQ**) Job Aid

# Identifying Resource Overallocation and Allocation Variance

- 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.



I. 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.

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**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.

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

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≡	$\leftarrow  \fbox{Show Chart}  + \text{ New }  \fbox{Delete}  \lor  \r{D} \text{ Refresh}$	🖼 Email a Link	│ ∨   ≫ Flow	v 🔟 Run Rep	oort 🗸 🕮 Exe	cel Templates $~~$	Export to Exc	el 🛛 🗸 🚺 Im	port from Excel	∨ 🗟 Create	view :
6) ()	Resource Availability Heatmap (My Resources)	Ŷ							$\nabla$	Search this view	Q
\$		November 20	21 🛗 🎹 5	~ >				Zoom 🗔		● ~ E	
	Requests by person	Novemb Committed	er 2021 Availability	Decemb Committed	er 2021 Availability	Januar Committed	y 2022 Availability	Februar Committed	y 2022 Availability	N Tog Committed	gle Full Screen mode Avanability
	··· 🗡 Albert Connell	30.0	135.0	10.0	162.5	20.0	137.5	20.0	130.0	0.0	172.5
R	··· 🗡 Bill Collett	10.0	155.0	0.0	172.5	0.0	157.5	15.0	135.0	0.0	172.5
6	··· V Brice Center	30.0	135.0	10.0	162.5	15.0	142.5	20.0	130.0	0.0	172.5
0	··· Carl Executive	0.0	165.0	0.0	172.5	0.0	157.5	0.0	150.0	0.0	172.5
	$\cdots \hspace{0.1 cm} \hspace{0.1 cm} \hspace{0.1 cm} \hspace{0.1 cm} \hspace{0.1 cm} $ 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.

	4	November 2021	🛅 🛄 5 🛇					Zoom 🗔			
Requests by person		Novemb	er 2021 Availability	Decemb	er 2021 Availability	January Committed	/ 2022 Availability	Februa	ry 2022 Availability	Marc	Expand All
Albert Connoll		20.0	125.0	10.0	163.5	20.0	127.6	20.0	120.0	0.0	172 (
Sensei IQ Resource M	¢.~	30.0	133.0	10.0	102.0	20.0	137.3	20.0	150.0	0.0	176
△ Bill Collett		10.0	155.0	0.0	172.5	0.0	157.5	15.0	135.0	0.0	172.
$\mapsto$ 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.
→ 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.
△ Chris Thomas		190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0	0.0	172.
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.

													×
	4	November 2021	🛗 💷 5 🔻	× >					Zoom 🗔		⊙ ∨ . <b>∃</b>		7
		November	2021	Decembe	r 202	1	January	2022	Februa	ry 2022	March	2022	
Requests by person		Committed	Availability	Committed	Ava	ailability	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	<b>⊡</b> √	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	⊊ Sen	sei IO Resource	Management	Implement	22				15.0				
 △ Brice Center	Com	ments for Chris Th	omas		×	162.5	15.0	142.5	20.0	130.0	0.0	172.5	
 → Sensei IQ Resource	FL FL	Francis Luzuriaga	request Chris T	homas please as he	bet 7 E is		15.0		20.0				
 Carl Executive		capacity to wo	r with the proje rk on this proje	ct scope and ne has ct.	1	172.5	0.0	157.5	0.0	150.0	0.0	172.5	
 △ Chris Thomas	FL	Francis Luzuriaga	d the requested	d effort for Chris	oct 8	22.5	210.0	-52.5	40.0	110.0	0.0	172.5	
 Sensei IQ Implementa	05	due to a chang	ge in scope.	0 hours to 50 hours	1		100.0						
 Sensei IQ Resource M	A C FL Over	Fr allocated in this view original reque	vilithout any ar	o this project have mendment from the	ct 26 B		110.0		40.0				
	FL	F I have reduced November fro on leave for 3	I the committed m 50 to 30 hour days as per con	o I work of Chris in 's as he will be away versation.	зt 27 У								
				E	>								

**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.

		4	November 2021	iii 5 ×					Zoom 🗔		$\circ$ $\checkmark$ $\blacksquare$	O D
			Novemb	er 2021	Decemb	er 2021	January	/ 2022	Februa	iry 2022	March	2022
	Requests by person		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
	$\mapsto$ Sensei IQ Resource	$\square$	10.0						15.0			
	A Brice Center		30.0	135.0	10.0	162.5	15.0	142.5	20.0	130.0	0.0	172.5
	(I→)ensei IQ Resource	C	30.0		10.0		15.0		20.0			
	Is a fulfilment for another request.	[	The visible period	for this request is a	urrently Approved	some of which ha	s been overwritten	by an approver.	0.0	150.0	0.0	172.
•••	△ Chris Thomas		190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0	0.0	172.
•••	Sensei IQ Implementa	©₽~	140.0		130.0		100.0					
	Sensei IQ Resource M	001	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.



			Novemb	er 2021	Decemb	er 2021	Janua	ry 2022	February	2022	March	2022
	Requests by person		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	<b>⊠</b> √	30.0		10.0		Availability (Capacity n = 137.5 hours	ninus all Committed h	ours on all projects)			
	△ Bill Collett		10.0	155.0	0.0	172.	The Breakdown	157.5 hours		135.0	0.0	172.5
•	↔ Sensei IQ Resource	₽~	10.0				Committed Availability	- 20.0 hours = 137.5 hours				
•	△ Brice Center		30.0	135.0	10.0	162.	Days with capacity:	21 days		130.0	0.0	172.5
•	$\mapsto$ Sensei IQ Resource		30.0		10.0		Percentage available: Period Status:	87% Submitted				
•	Carl Executive		0.0	165.0	0.0	172.	In this case the availab Albert Connell.	ility is for the specific	resource:	150.0	0.0	172.5
•	△ Chris Thomas		190.0	-25.0	B 150.0	22.	Note: This number do fulfil this resource's rec	es not count any reso quests.	urces assigned to	110.0	0.0	172.5
•	Sensei IQ Implementa	🕚 🏳 Ava	lability (Capacity mi	nus all Committed h	ours on all projects)		100.0			Availability (C	apacity minus all Cor	nmitted hours on all
•	Sensei IQ Resource M	© 🗭 The Cap Cor Ava	Breakdown acity nmitted - ilability =	165.0 hours 190.0 hours -25.0 hours			110.0		40.0	The Breakdow Capacity Committed Availability	• 172.5 hou - 0.0 hou = 172.5 hou	rs rs
		Day Peri Peri	s with capacity: centage available: od Status: nis case the availabil	22 days -15% Approved ty is for the specific	resource:					Days with cap Percentage a In this case th Chris Thoma	vailable: 23 day vailable: 100 e availability is for th s.	rs % e specific resource:
		Chri Not fulfi	<b>is Thomas</b> . <b>e:</b> This number doe: I this resource's requ	not count any reso lests.	irces assigned to					Note: This nu fulfil this reso	mber does not count urce's requests.	any resources assign

# Availability Heatmap Legend:

190.0 -25.0	Committed work is at least 10% over the resource capacity for the visible period. It means that the resource is <b>overallocated</b> and has <b>negative availability</b> .
172.5 0.0	Committed work is equal to 100% of resource capacity for the visible period. It means that the resource is <b>fully allocated</b> and has <b>zero availability</b> .
A gradient of blue and green in 10% increments	Committed work is between 0% and 100% of the resource capacity for the visible period. It means that the resource is <b>under allocated</b> and has <b>low</b> to <b>high availability, they are under-utilized.</b>
40.0 110.0	
150.0 22.5	
0.0 172.5	There is no committed work for the visible period. It means that the resource is <b>not allocated (under-utilized)</b> and has <b>full availability</b> .

**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.

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র্মা Requests by person	=	÷	다 📓 Save 👹 Save & Close 🚽	New 📋	] Delete (	) Refresh	Check a	Access 🗹	Share D	령 Email a Li	nk 🔊 Flo	w v da	Word Tem	plates 🗸	💷 Run Re	eport 🗸				
Chris Thomas	6) () () ()	Se Pro Maj	oject · Resource Managemen	t Implen	nentation	- Saved						0—				Francis Lu Project Mar	zuriaga J ager S	Active itatus Po	rtfolio Pro	gram 🗸
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	©	5	Requests by Primary Role	Overa Proposed	ill Total ← Committed	Proposed	October 202 Committed	Availability	October 202 No Proposed	21 🛄 0 ovember 200 Committed	111 5 ∨ 21 Availability	D Proposed	ecember 20 Committed	Z 21 Availability	Proposed	January 2022 Committed	Availability	Proposed	Ebruary 202 Committed	2 Availability
	$\otimes$		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	1,070.0
	© %		△ DBA Generic □	<b>220.0</b> 220.0	0.0	<b>60.0</b> 60		0.0	<b>50.0</b>		0.0	<b>20.0</b> 20		0.0	<b>30.0</b> 30		0.0	<b>60.0</b>		0.0
	8		△ 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	410.0
	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	130.0
			™ Bill Collett		45.0		20.0	137.5		10.0	155.0			172.5			157.5		15.0	135.0
			™ Bob Melvin 💭 🗸		25.0		10.0	147.5		10.0	155.0			172.5			157.5		5.0	145.0
			△ 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	400.0
			Generic 🖾 🗸	200.0		50			50			20			30			50		
			T→ Brice Center 🖓 🗸		105.0		30.0	127.5		30.0	135.0		10.0	162.5		15.0	142.5		20.0	130.0
			Te Jason Huebner 🔤 🗸		40.0		10.0	147.5		10.0	155.0		0.0	172.5		10.0	147.5		10.0	140 😅

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**).

Netweilse         Note         Value         December 201         December 201         January 202         February 202         February 202         March 202			November 2021 III IIII 5 V	P				Zoom Le		101 V [H]	BUZ
Matrix Albert Connell       Sensei IQ Implementation Comments for Chris Thomas       162.5       20.0       137.5       20.0       130.0       0.0       172.5         M Bil Collett       Main Control       Incontrol       Incontro		Requests by person	November 2021 Committed Availability	December 202 Committed Av	1 ailability	January Committed	y 2022 Availability	Februa Committed	ry 2022 Availability	March Committed	2022 Availability
Image: Sense IQ Inglementa       Image: Sense II Inglementa		✓ Albert Connell	Sensei IQ Implementation Comments for Chris Thomas	×	162.5	20.0	137.5	20.0	130.0	0.0	172.5
Image: Sense IQ Resource M       Sense IQ Resource M       1625       150       1425       200       1300       0.0       1722         Image: Sense IQ Resource M       Image: Sense IQ Resou		✓ Bill Collett			172.5	0.0	157.5	15.0	135.0	0.0	172.5
Carl Executive     172.5     0.0     157.5     0.0     150.0     0.0     172.5            · Chris Thomas         · Sensei 1Q Implementa         · Sensei 1Q Implementa         · Sensei 1Q Resource M         · O         · O         · O		✓ Brice Center			162.5	15.0	142.5	20.0	130.0	0.0	172.5
Chris Thomas     22.5     2100     -52.5     40.0     110.0     0.0     172.2		Carl Executive			172.5	0.0	157.5	0.0	150.0	0.0	172.5
Sensei IQ Implementa         C         O         100.0         100.0           ····         Sensei IQ Resource M         O         110.0         40.0         100.0		^ Chris Thomas			22.5	210.0	-52.5	40.0	110.0	0.0	172.5
Sensei IQ Resource M         OC         110.0         40.0	••••	Sensei IQ Implementa	)			100.0					
		Sensei IQ Resource M				110.0		40.0			

# Identify resource allocation from the Resource Demand screen

#### Resource Manager

<sup>®</sup> 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.

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Resou	irces			Requests by Resource	Overa Proposed	II Total ← Committed	N Proposed	ovember 20 Committed	21 Availability	Proposed	ecember 20 Committed	21 Availability	Proposed	January 202 Committed	2 Availability	Proposed	February 202 Committed	2 Availability	Proposed	March 202 Committee
ai ⊨ ⊡	nsights			Totals	2,285.0	1,015.0	730.0	290.0	565.0	490.0	180.0	692.5	715.0	255.0	542.5	130.0	130.0	655.0		
EA P	tesources interprise Calendar:	5		✓ Albert Connell	570.0	180.0	190.0	50.0	135.0	110.0	10.0	162.5	170.0	20.0	137.5	40.0	40.0	130.0		
වේ ව	tesource Demand	1		A Bill Collett	360.0	0.0	100.0		155.0	100.0		172.5	160.0		157.5			135.0		
⊗ A	wailability Heatmap	<sup>2</sup> 1		✓ Brice Center	385.0	0.0	140.0		135.0	100.0		162.5	145.0		142.5			130.0		
Know	ledge		•••	✓ Carl Executive	130.0	0.0	60.0		165.0	10.0		172.5			157.5			150.0		
ОТ По V	raining Vhat's New			✓ Chris Thomas	640.0	640.0	190.0	190.0	-25.0	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		20.0	20.0		30.0	25.0		50.0	50.0			
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b. Change the selected **date** for the first period that you want to review resource availability from.

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0	Search O		4 Octol	per 2021	B b		Zoom 🗔		o∨ ⊫∨ ⊡ E	102
ai a	Requests by Resource	Overall Total ← Proposed Committed	October 202 Proposed Committed	1 Availabilit	Change selected date October 2021	for first period. ↓ 2021	↑ ↓ ility Proposed	January 2022 Committed Availability	February 202 Proposed Committed	2 Availability
B.	Totals	2,285.0 1,015.0	220.0 160.0	657.5	S M T W T F 26 27 28 29 30 1	S Jan Feb	Mar Apr 2.5 715.0	255.0 542.5	130.0 130.0	655.0
84	🗡 Albert Connell	570.0 180.0	60.0 60.0	127.5	3 4 5 6 7 8 10 11 12 13 14 15	9 May Jun	Jul Aug 1.5 170.0	20.0 137.5	40.0 40.0	130.0
•	$\cdots$ $\checkmark$ Bill Collett	360.0 0.0		137.5	17 18 19 20 21 22	23 Sep Oct	Nov Dec 1.5 160.0	157.5		135.0
() ()	···· 🖂 Brice Center	385.0 0.0		127.5	24 25 26 27 28 29 31 1 2 3 4 5	6	Go to today 2.5 145.0	142.5		130.0
	···· 🗡 Carl Executive	130.0 0.0	60.0	157.5	60.0	165.0 10.0	172.5	157.5		150.0
	🗡 Chris Thomas	640.0 640.0	50.0 50.0	107.5	190.0 190.0	-25.0 150.0	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	

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

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ŵ	Resource Demand ~						$\bigcap$											7
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<i>4</i> 1	Requests by Resource	Overall Proposed	Total ← Committed	Proposed	October 2021 Committed	Availability	Pri		ity	D Proposed	ecember 20 Committed	21 Availability	Proposed	January 2022 Committed	2 Availability	Proposed	February 202 Committed	2 Availability
B	Totals	2,285.0	1,015.0	220.0	160.0	657.5	✓ 5 7		D	490.0	180.0	692.5	715.0	255.0	542.5	130.0	130.0	655.0
R R	··· V Albert Connell	570.0	180.0	60.0	60.0	127.5	10		D	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	12		D	100.0		172.5	160.0		157.5			135.0
	🗡 Brice Center	385.0	0.0			127.5	20		D	100.0		162.5	145.0		142.5			130.0
	🗠 Carl Executive	130.0	0.0	60.0		157.5	25		D	10.0		172.5			157.5			150.0
	$\cdots$ $\checkmark$ Chris Thomas	640.0	640.0	50.0	50.0	107.5	31		p	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	

Job Aid

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

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ଜ	Resource Demand $\sim$																	Y	
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	Requests by Resource	Overa Proposed	Ill Total ← Committed	Proposed	October 202 Committed	Availability	Proposed	lovember 20 Committed	21 Availability	D Proposed	ecember 202 Committed	21 Availability	Proposed	Committee	h Availability	Proposed	February 202 Committed	2 Availabilit	ý
දී	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	
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	
	$\cdots$ $\checkmark$ 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.

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Bà	Requests by Resource	Committed	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availai	how Committed	ity
	Totals	1,015.0	160.0	657.5	290.0	565.0	180.0	692.5	255.0	! √ s	how Availability	5.0
ઉત્	🗸 Albert Connell	180.0	60.0	127.5	50.0	135.0	10.0	162.5	20.0	'√ s	how Overall Row Total	s 0.0
°o	··· Bill Collett	0.0		137.5		155.0		172.5		, H	ide Total Columns	5.0
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	··· 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	

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

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<i>s</i> ii	Requests by Resource	Overall Total ← Committed	Octobe Committed	r 2021 Availability	Novemb Committed	er 2021 Availability	Decemb Committed	er 2021 Availability	Januar Committed	y 2022 Availability	Committee	Full Screen mode
B	Totals	1,015.0	160.0	657.5	290.0	565.0	180.0	692.5	255.0	542.5	130.0	655.0
R R	V 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
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
	$\dots$ $\checkmark$ 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	

Job Aid

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.

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-	Requests by Project	Committed	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	- Hoject	
臣	Totals	1,015.0	160.0	1,100.0	290.0	1,030.0	180.0	1,200.0	255.0	1,005.0	Resource 130.0	1,070.0
BR	···· 💛 Sensei IQ Implementation	370.0		500.0	140.0	400.0	130.0	520.0	100.0	385.0		505.0
@ 0	$\cdots$ $\checkmark$ 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

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<i></i>	Requests by Resource	Overall Total ← Committed	Octobe Committed	er 2021 Availability	Novemb Committed	er 2021 Availability	Decemb Committed	er 2021 Availability	Januar Committed	y 2022 Availability	Project	
殿前	Totals	1,015.0	160.0	657.5	290.0	565.0	180.0	692.5	255.0	542.5	<ul> <li>Resource</li> <li>130.0</li> </ul>	655.0
ß	🖂 Albert Connell	180.0	60.0	127.5	50.0	135.0	10.0	162.5	20.0	137.5	40.0	130.0
6	··· Bill Collett	0.0		137.5		155.0		172.5		157.5		135.0
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	🗡 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.

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© \$		Search D		⊲ o	tober 2021	∄ IIII 5 ∨	Þ			Zoom 🕻		<b>⊡</b>		) <b>H</b> 2
<i>i</i> ii		Requests by Resource		Overall Total ← Committed	- Octobe Committed	er 2021 Availability	Novemb Committed	er 2021 Availability	Decemb Committed	Availability	Januar Committed	y 2022 Availability	Febru Committed	Expand All Availability
國		Totals		1,015.0	160.0	657.5	290.0	565.0	180.0	692.5	255.0	542.5	130.0	655.0
8		△ 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	<b>1</b>	110.0	30		30		10		20		20	
0		<sup>T</sup> → Bill Collett		45.0	20	137.5	10	155.0		172.5		157.5	15	135.0
		T→ 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
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		Sensei IQ Resource M	<u>o</u> ,	270.0	50		50		20		110		40	
		△ Consultant		195.0	50.0		50.0		20.0		25.0		50.0	
		Sensei IQ Resource M	¢≊.√											
		T₄ Brice Center		105.0	30	127.5	30	135.0	10	162.5	15	142.5	20	130.0

Job Aid

# 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.

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Â		Requests by Resource		Overall Total ← Committed	October 2 Committed	2021 Availab	ility	Novemb Committed	er 2021 Availability	Decemb Committed	er 2021 Availability	Janua Committed	y 2022 Availability	Februa Committed	ry 2022 Availability
B		Albert Connell		180.0	60.0	12	27.5	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	
æ		<sup>T</sup> → Bill Collett	<b>P</b> ~	45.0	20	1	37.5	10	155.0		172.5		157.5	15	135.0
•		T→ Bob Melvin		25.0	10	1	47.5	10	155.0		172.5		157.5	5	145.0
0		Bill Collett	Sen Com	25.0     10     1       Sensei IQ Resource Management Implement     X       Comments for Chris Thomas     X					155.0		172.5		157.5		135.0
		Brice Center	FL	Francis Luzuriaga	Thomas please as h	oa 7 he is	7.5		135.0		162.5		142.5		130.0
		Carl Executive		capacity to work on this proj	ect scope and he n ect.		7.5		165.0		172.5		157.5		150.0
		△ Chris Thomas	A	Francis Luzuriaga I have increased the requeste Thomas for November from	ed effort for Chris	Oct 8	7.5	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0
		Sensei IQ Implementa	<u>A</u>	due to a change in scope.				140		130		100			
		Sensei IQ Resource M	A (0 🖾 )	Francis Luzuriaga	n this project have	Oct 26		50		20		110		40	
		△ Consultant	over a	illocated in this view! without any a original request.	amendment from ti	he		50.0		20.0		25.0		50.0	
	•••	Sensei IQ Resource M	FL FL	Francis Luzuriaga	And Action 1	Oct 27									
		<sup>™</sup> Brice Center	<b>P</b>	November from 50 to 30 hou on leave for 3 days as per co	irs as he will be aw	ay	7.5	30	135.0	10	162.5	15	142.5	20	130.0
		<sup>™</sup> → Jason Huebner	ي ا	or name for 5 days as per co	THE MEDIC		7.5	10	155.0	0	172.5	10	147.5	10	140.0
		<sup>T</sup> → Walt Nickel				⊳	7.5	10	155.0	10	162.5	0	157.5	20	130.0
													Autofill	Save	Cancel

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.

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สมั		Requests by	Resource		Overall Total ← Committed	Octobe	er 2021 Availability	Novemb	per 2021 Availability	December	2021 Availability	Januar	y 2022 Availability	Februar Committed	y 2022 Availability
Bà		^ 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	<b>1</b>	110.0	30		30		10		20		20	
R.		T→ Bill	Collett	<b>~</b>	45.0	20	137.5	10	155.0		172.5		157.5	15	135.0
6		T→ Bob	Melvin		25.0	10	147,5	10	155.0		172.5		157.5	5	145.0
0		Bill Coll	ett		0.0		137.5		155.0		172.5		157.5		135.0
		Brice G	enter		0.0		127.5		135.0		162.5		142.5		130.0
		Carl Exe	ecutive		0.0		157.5		$\cap$		172.5		157.5		150.0
		△ Chris TI	nomas		640.0	50.0	107.5	190.0	-25.0		22.5	210.0	-52.5	40.0	110.0
		Sensei	IQ Implementa	୍ତ୍ର 🖾 🗸	370.0		Avai	lability (Capacity mir	nus all Committed h	ours on all projects)		100	$\bigcirc$		
		Sensei	IQ Resource M	0 <sup>11</sup> ~	270.0	50	= ·2 The	Breakdown				110		40	
		^ Consult	ant		195.0	50.0	Con	nmitted -	190.0 hours			25.0		50.0	
		Sensei	IQ Resource M	<b>⊡</b> ~			Avai	ilability =	-25.0 hours						
		T→ Bric	e Center		105.0	30	12 Day 12 Perc	s with capacity: entage available:	22 days -15%		162.5	15	142.5	20	130.0
		T→ Jase	on Huebner	<b>1</b>	40.0	10	14 Peris	od Status: iis case the availabili	Approved ty is for the specific	resource:	172.5	10	147.5	10	140.0
		™ Wal	t Nickel	<b>₽</b> √	50.0	10	14 Chri Not	s Thomas. e: This number does	not count any reso	urces assigned to	162.5	0	157.5	20	130.0
								uns resource's requ	E 213.				Autofill	Save	Cancel

Job Aid

**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.

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Sensei IQ Resource M	\$7	Majo Activ	e for 19 days		Planning	g (19 D)					Exe	cution				Clo	sing		>
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G	9	1	Requests by Primary Role	Overa Proposed	Il Total ← Committed	Proposed	October 2021 Committed	Availability	No Proposed	Committed	21 Availability	D Proposed	committed Availab	ity Proposed	January 2022 Committed	Availability	Proposed	February 202 Committed	2 Availability
6	•	1	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
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j.	¢.	-	^ 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
d	0		Generic 🖓 📾	160.0		40			-30			20		30			40		
in the second			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	C	0 30.0		0.0	50.0		0.0
			Generic 📴 📾	200.0		50			50			20		30			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		150.0
			Carl Executive	170.0	0.0	60		157.5	60		165.0	10	172	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		150.0

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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 availability (**recommended**).

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			Overall Total ←	Octobe	r 2021		Novemb	er 2021	Decembe	er 2021	Janua	rv 2022	Februar	TV 2022
	Requests by Resource		Committed	Committed	Availa	bility	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.
	Sensei IQ Resource M	<b>1</b>	110.0	30			30		10		20		20	
	T→ Bill Collett		45.0	20		137.5	10	155.0		172.5		157.5	15	135
	<sup>T</sup> → Bob Melvin		25.0	10		147.5	10	155.0		172.5		157.5	5	145
	Bill Collett	Sens	ei IQ Resource Managemente ments for Chris Thomas	nt Implement	×	7.5		155.0		172.5		157.5		135.
	Brice Center	FL	Francis Luzuriaga I would like to request Chris	s Thomas please a	od 7 is he is	7.5		135.0		162.5		142.5		130
	Carl Executive		already familiar with the pro capacity to work on this pro	bject scope and hi bject.	e has	7.5		165.0		172.5		157.5		150
	^ Chris Thomas	FL	Francis Luzuriaga I have increased the request	ted effort for Chri	Oct 6	7.5	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110
	Sensei IQ Implementa	00	Thomas for November from due to a change in scope.	1 40 hours to 50 h	ours		140	$\bigcirc$	130		100	$\smile$		
	Sensei IQ Resource M	60	Francis Luzuriaga		Oct 26		50		20		110		40	
	△ Consultant	V	All proposed work for Chris been approved without any original request.	in this project ha amendment from	ve n the		50.0		20.0		25.0		50.0	
	Sensei IQ Resource M		Francis Luzuriaga		Oct 27									
	T→ Brice Center		I have reduced the committ November from 50 to 30 ho	ed work of Chris ours as he will be	in away	7.5	30	135.0	10	162.5	15	142.5	20	130.
	T+ Jason Huebner	<u>1</u>	on teave for 3 days as per o	onversation.		7.5	10	155.0	0	172.5	10	147.5	10	140.
	T→ Walt Nickel	We	have to discuss how we can bal	lance the	A	7.5	10	155.0	10	162.5	0	157.5	20	130
		and	January 2022.		-									
												Autofill	Save	Cance

**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 <u>3. Modify an existing fulfilled request</u> for named resources from a related downloadable titled <u>JOB AID - Reviewing and approving resource</u> requests.

# Identify resource overallocation from Insights

Resource Manager

Resources > Resources > 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.

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- 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**).

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

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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.

Year	2021	2022											Total	
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			8 100	373	181								1,9	
			1 150										1,9	
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Total	6,705		6,080		6,615	6,930	6,930	6,6		6,930	6,615	6,930		



#### Availability Heatmap Legend:

0	Committed work is equal to 100% of resource capacity for the visible period. It means that the resource is <b>fully allocated</b> and has <b>zero availability</b> .
-52	Committed work is at least 10% over the resource capacity for the visible period. It means that the resource is <b>overallocated</b> and has <b>negative availability.</b>
173	There is no committed work for the visible period. It means that the resource is <b>not allocated (under-utilized)</b> and has <b>full availability.</b>
A gradient of red, amber, and green in 10% increments)	Committed work is between 0% and 100% of the resource capacity for the visible period. It means that resource is <b>under allocated</b> and has <b>low</b> to <b>high availability, the resource is (under-utilized)</b> .

**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.



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# Identify resource allocation from the Allocation tab

#### Resource Manager

Resources > Resources > Allocation

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- 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.

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Resources	Chris Thomas (Project for the Web)	External					
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d. Once the **bookable resource record** is open, click the **Allocation** tab to display the **Committed** hours of the named resource across all projects.

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

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

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

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## 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.

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	··· Sensei IQ Resource M	O C A Original request.	50.0	20.0	110.0	40.0	
		Over allocated in this view!         the committed work of Chris in Roveilluber from 50 to 30 hours as he will be away on leave for 3 days as per conversation.           Ref         Ner 3           Ve have to discuss how we can balance the workload of Chris fromas 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.

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											Days with capacity Percentage availal Period Status: In this case the av	r: 22 days Je: -15% Approved ilability is for the selec	cted resource.							

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.

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	T+ Jason Huebner		40.0		10.0	147.5		10.0	155.0		0.0	172.5		10.0	147.5		10.0	140

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 availability (**recommended**).

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		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										

**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 <u>3. Modify an existing fulfilled request</u> for named resources from a related downloadable titled <u>JOB AID - Reviewing and approving resource</u> requests.

# Identify resource allocation from the Resource Plan tab

Resource Manager

Projects > Leadership > Projects > Resources > Resource Plan

#### 1. SET THE RESOURCE PLAN HORIZON

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



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

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

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

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		<sup>™</sup> Bob Melvin	/	25.0		10.0	147.5		10.0	155.0			172.5			157.5		5.0	145.0	D

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.

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

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		△ Consultant	195.0	50.0	422.5	50.0	445.0	20.0	497.5	25.0	447.5	50.0	400.0
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		$$ Brice Center $\square \checkmark$	105.0	30.0	127.5	30.0	135.0	10.0	162.5	15.0	142.5	20.0	130.0
		ti→ Jason Huebner 🔤 🗸	40.0	10.0	147.5	10.0	155.0	0.0	172.5	10.0	147.5	10.0	140 🤤

## 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.

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P		ver allocated in this view! e committed work of Chris in November from 50 to 30 hours as he will be away on leave for 3 days as per conversation.										
0		FI Nov S										
68		We have to discuss how we can balance the workload of Chris Thomas in November 2021 and January 2022.										
		⊳										

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.

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**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.

Job Aid



**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.

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d. 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 availability (**recommended**).

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	wo	Algorithm and the second secon										



**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 <u>3. Modify an existing fulfilled request</u> for named resources from a related downloadable titled <u>JOB AID - Reviewing and approving resource requests</u>.



# Identify resource allocation from the Resource View

Project Manager

Projects > Leadership > Projects > Tasks > 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 Gannt chart window to apply the **Resource View** on the page.

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**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.

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**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 Gannt chart.

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

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Job Aid

- e. Drag the **vertical splitter bar** and drop it to the right edge of the **Calculated Effort Remaining Hours** ensuring that the Gannt 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 Gannt chart displayed on the right-hand side of the screen.

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## 2. EVALUATE WORK ASSIGNMENTS OF NAMED RESOURCES

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

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**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 Gannt 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 Gannt chart bar where overallocation is displayed.

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**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.

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**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

Resource Manager

Resources > Resources > 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.

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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

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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**).

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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.

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# 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, <u>**not**</u> 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

Job Aid

- 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)

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**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.

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**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.