

Overview

This Job Aid defines the steps to follow for Managing Resource Capacity and Demand in Sensei IQ. Resource Capacity is calculated at the individual resource level based on the work hours defined by the resource's enterprise calendar and any resource exceptions for non-working time, such as vacations. Resource Demand is defined by the Project Resource Requests which identify all the resources, either Generic or Named, and the level of effort required for each to complete the project. This Job Aid is focused on ensuring that project resource requests are approved based on availability of resources and the ongoing monitoring of resource utilization in the organization to optimize resource assignments for your entire team.

There are two (2) actions required for managing resource capacity and demand. Both should be applied consistent with your organization's policies for resource capacity and demand management.

- 1. Review and Approve Resource Requests
- 2. Identify and Resolve Resource Overallocations

Review and Approve Resource Requests

Resource Manager

Resources

1. REVIEW AND APPROVE RESOURCE REQUESTS

- a. Ensure you are in the **Resources area**, click **Resource Demand** in the **Resources** section.
- b. Use the buttons on the **sub-grid tool bar** to define **the start date**, **number of periods and view zoom level** (typically monthly).

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Note - This date range not only sets the visible time periods on the screen, it is also used by the resource availability heat map for each named resource to help you quickly validate that resource's availability and constrains dates used by the Autofill and Resource allocation functionality.

c. For all **resource requests** that require **approval and/or replacement** of a generic resource with a named resource, **expand the resource** to see the list of the **projects** requesting this resource.

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d. Click the **ellipsis** to the left of the project request and select **Add Resource**.

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e. Select the most appropriate resource from your team who has the skills and availability to work in the project,



- f. This will automatically **commit the selected resource** to the project **based on availability and the request details**.
- g. Adjust the committed hours by adjusting the amount in any of the time-based Committed columns.

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h. Click Save once all Resource Requests have been committed.

2. CREATE NEW RESOURCE REQUESTS

- a. Ensure you are in the **Resources area**, click **Resource Demand** in the **Resources** section.
- b. Select Add Resource from the sub-ribbon.

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- c. Define the **project** the new resource requests are to **be added to**.
- d. Define the resources who will be added to the project.

Add Resource Request	\times
Locate the project and one or more resources to add the request for.	
Project AA Tenant Renewal R300 ×	
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e. Define the number of hours the resource will be committed to the project.

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Resource Manager

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1. IDENTIFY AND RESOLVE RESOURCE OVERALLOCATIONS

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

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Tip - First, it's important to understand the color coding of the heatmap. Starting at the overallocated end of the scale, any resource commitment that is more than 10% over the resource's capacity will be red and should be resolved. Resources that are between 100 and 110% of their capacity are dark green in recognition that a little over allocation is probably acceptable as resource requests are estimates only, and then on the underutilized side of things the color ranges from dark blue for not used at all to a lighter green for near full utilization.

b. Use the buttons on the **sub-grid tool bar** to define **the start date**, **number of periods and view zoom level** (typically monthly).

Resource Availability Heatmap \vee					Q
December 2021	☐ December 2021 IIII 31 ∨ ▷ January 2022 February 2022 March 2022	April 2022 May 2022	B Zoom 🛱 🛅 🗄 June 2022 July 2022	Ē Ē ⊙ ∨ .∓ August 2022	September 2

c. Review any **red or overallocated resources** by **hovering** over the red cells and **reviewing the calculations** to better understand the cause of the overallocation.



Managing Resource Capacity and Demand



d. Click the **ellipsis** (...) to the left of the **resource name** and select **Open Resource** and/or click the **ellipsis** (...) to the left of the **project name** and select **Open Project** to see more details about the resource's allocation.

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\cdots Halifax Data Cente (e) 💭 🗸	200.0
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Note - The Availability Heatmap does not support updates as you will typically need to work with the project managers to identify the appropriate corrective actions to remove over-allocations by updating the resource requests to reduce hours for that resource and creating new resource requests for an under-allocated resource to keep the total level of resource commitment to the project consistent.