

Overview

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

Work resources have defined availability and may have their time scheduled by a line manager in your organisation. 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 organisational 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 organisation to make sure that the workload of resources is balanced appropriately.

Important: Resource availability is the difference between the overall resource capacity (based on the resource calendar and target utilisation) 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 customised in your organisation's 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 minimise, 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**.

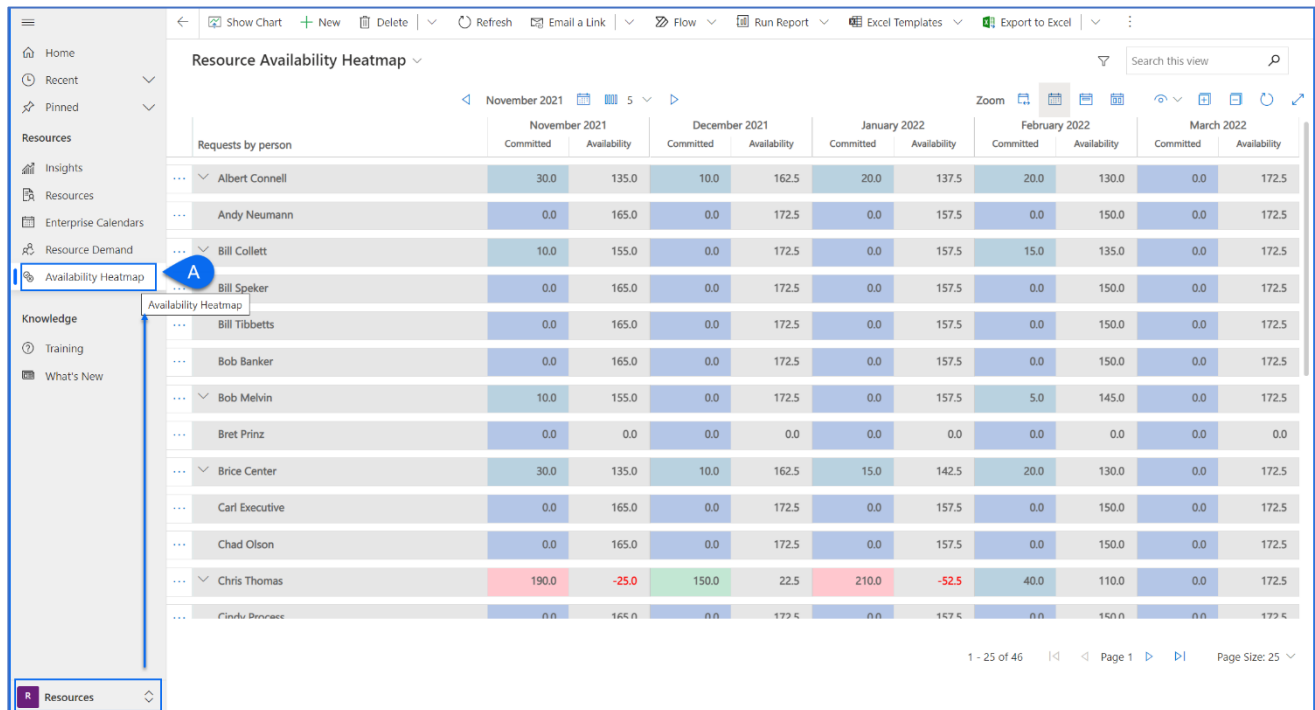
If there is a significant variance in the resource allocation between the resource plan (*committed work*) and the project plan (*work assignments*), the project manager will have to work to optimise the schedule, cut scope, or negotiate for additional resources or changed dates to remain aligned to the committed work approved by the respective line managers.

Identify resource overallocation using the Availability Heatmap

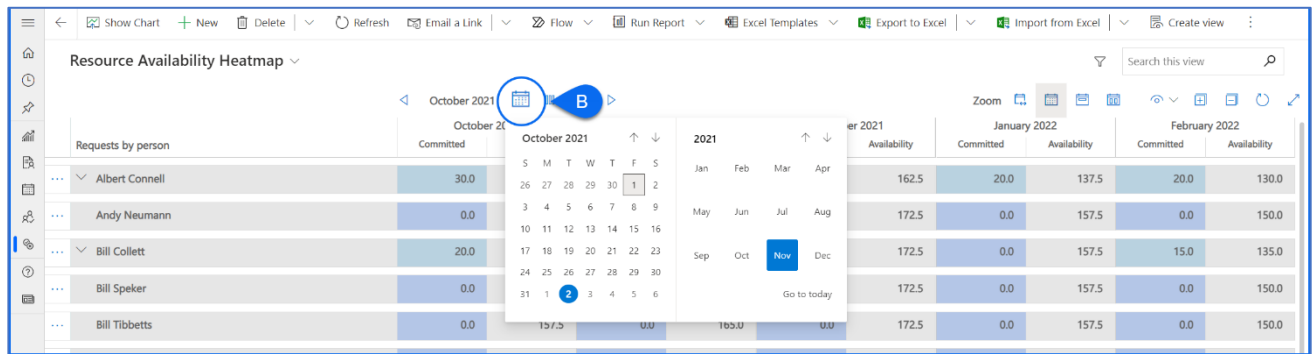
 Resource Manager  Resources > Resources > Availability Heatmap

1. SET THE RESOURCE AVAILABILITY HORIZON

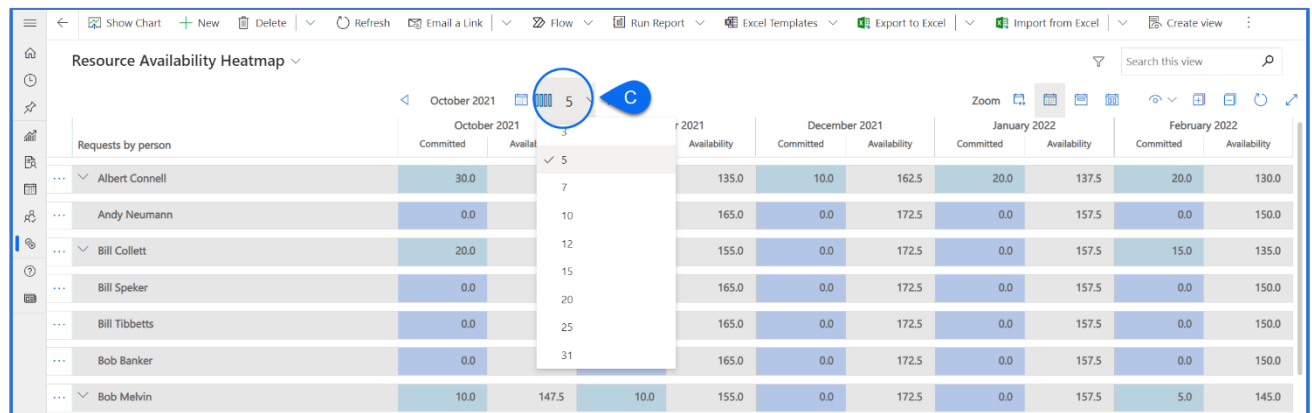
- Ensure that you are in the **Resources** area and click **Availability Heatmap** in the **Resources** section.



- 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.

Requests by person	November 2021		December 2021		January 2022		February 2022	
	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
Andy Neumann	0.0	165.0	0.0	172.5	0.0	157.5	0.0	150.0
Bill Collett	10.0	155.0	0.0	172.5	0.0	157.5	15.0	135.0

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).

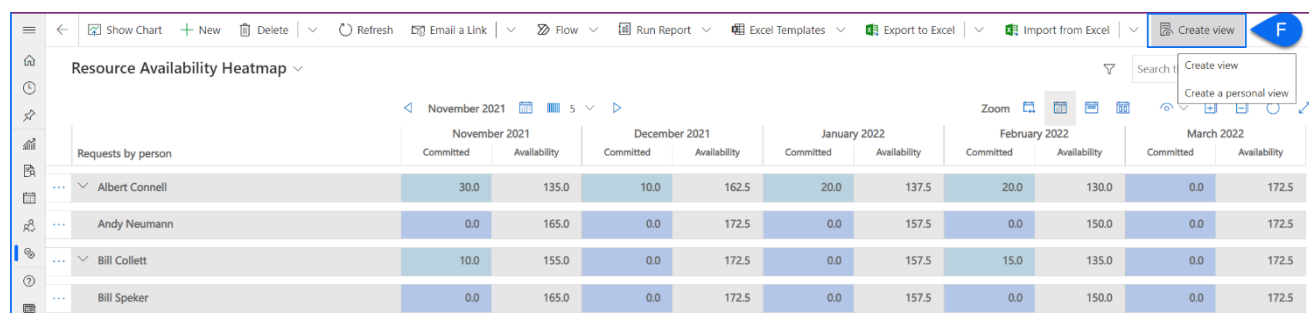
Requests by person	November 2021		December 2021		January 2022		February 2022	
	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed
Albert Connell	190.0	30.0	135.0	110.0	10.0	162.5	170.0	20.0
Andy Neumann	0.0	0.0	165.0	0.0	0.0	172.5	0.0	157.5
Bill Collett	0.0	0.0	155.0	100.0	0.0	172.5	0.0	157.5
Bill Speker	0.0	0.0	165.0	0.0	0.0	172.5	0.0	157.5
Bill Tibbetts	0.0	0.0	165.0	0.0	0.0	172.5	0.0	157.5
Bob Banker	0.0	0.0	165.0	0.0	0.0	172.5	0.0	157.5
Bob Melvin	0.0	10.0	155.0	0.0	0.0	172.5	0.0	157.5

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.

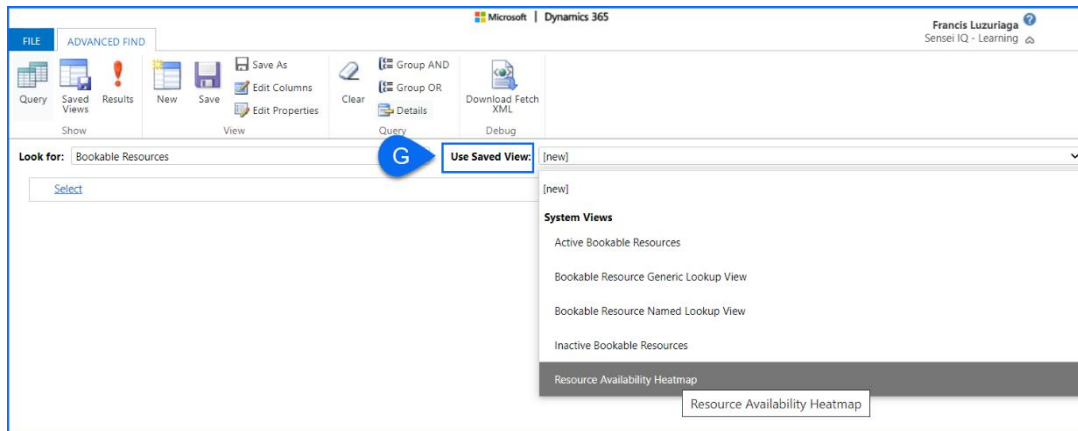


Important: This *read-only* report displays the committed work and availability of all named resources (also referred to as **bookable resources**) by default. Unless the default system view is customised in your organisation's solution, a personal view can be created with custom filters by the users 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.



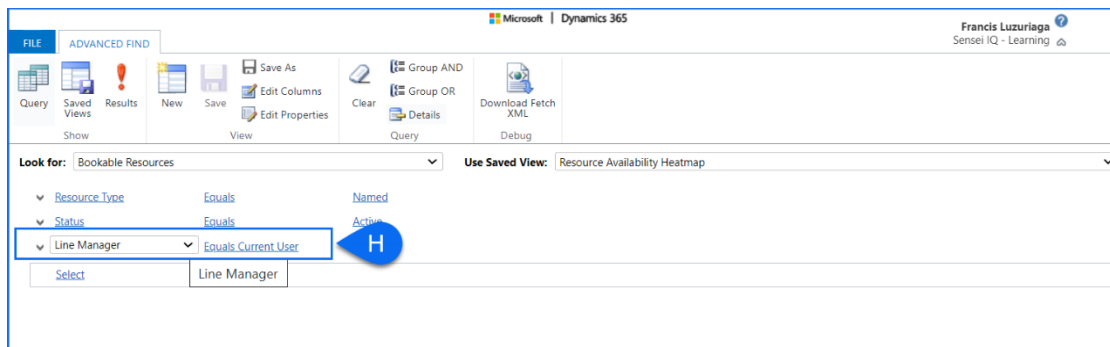
- g. In the dialog box, select **Resource Availability Heatmap** from the **Use Saved View** drop-down list.



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

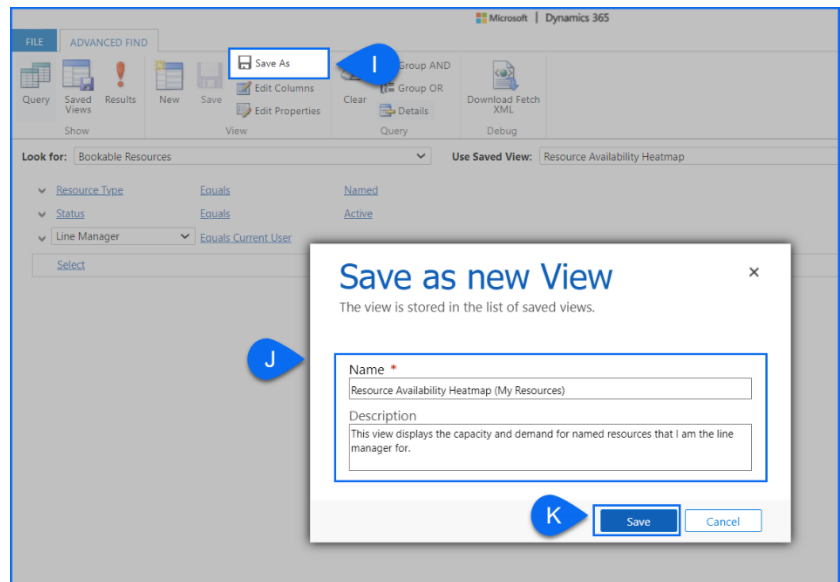
- **Line Manager – Equals Current User**

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

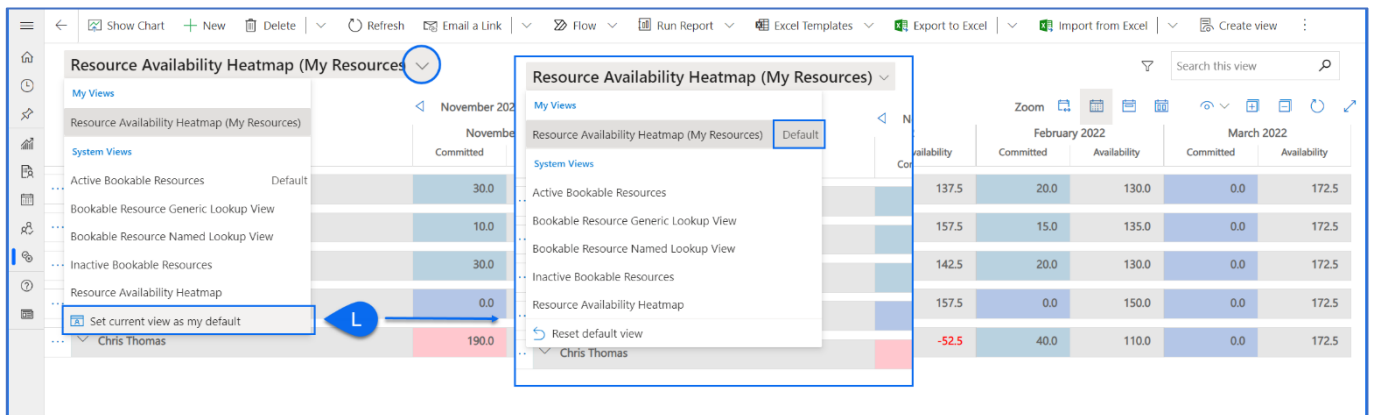


i. Once you have set the custom filter, click the **Save As** button from the **Advanced Find** ribbon.

- 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.



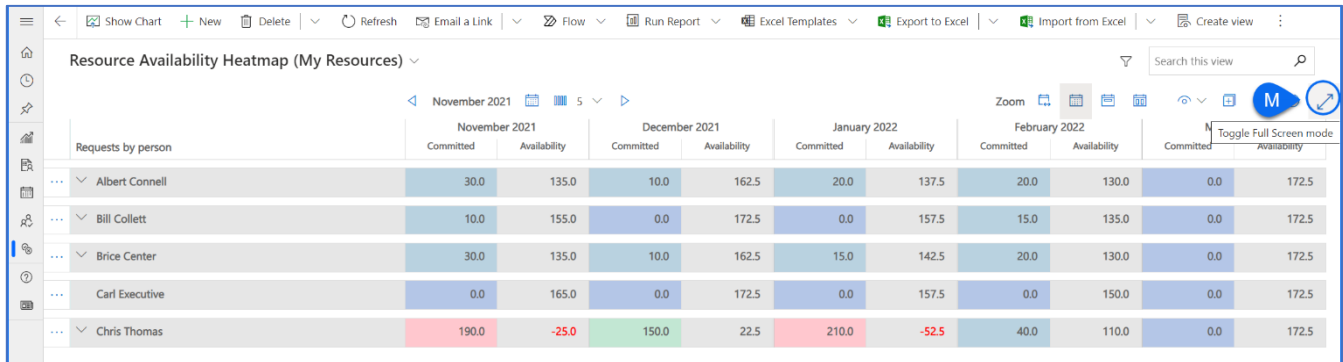
- l. Apply the newly added custom personal view from the **My Views** list on the main **Resource Availability Heatmap** page and select **Set current view as my default** from the menu options.



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.

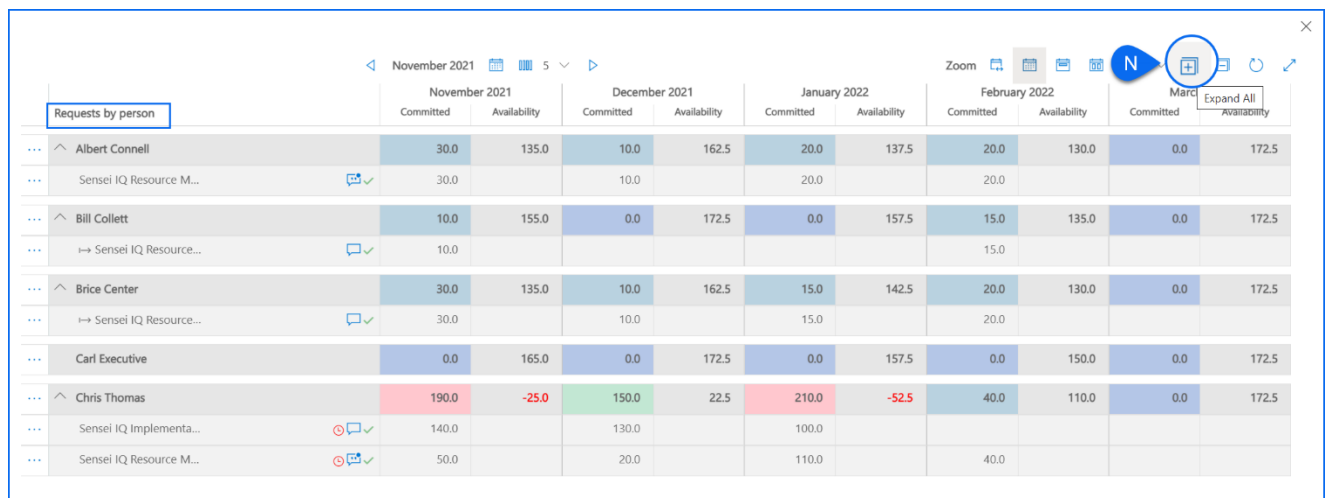
Requests by person	November 2021		December 2021		January 2022		February 2022		March 2022	
	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Albert Connell	30.0	135.0	10.0	162.5	20.0	137.5	20.0	130.0	0.0	172.5
Bill Collett	10.0	155.0	0.0	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 tooltip for 'Chris Thomas' is open, showing comments from Francis Luzuriaga dated Oct 7, Oct 8, and Oct 26. The tooltip text includes: '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.', 'I have increased the requested effort for Chris Thomas for November from 40 hours to 50 hours due to a change in scope.', and 'All the work for Chris in this project have been allocated in this view without any amendment from the original request.'.

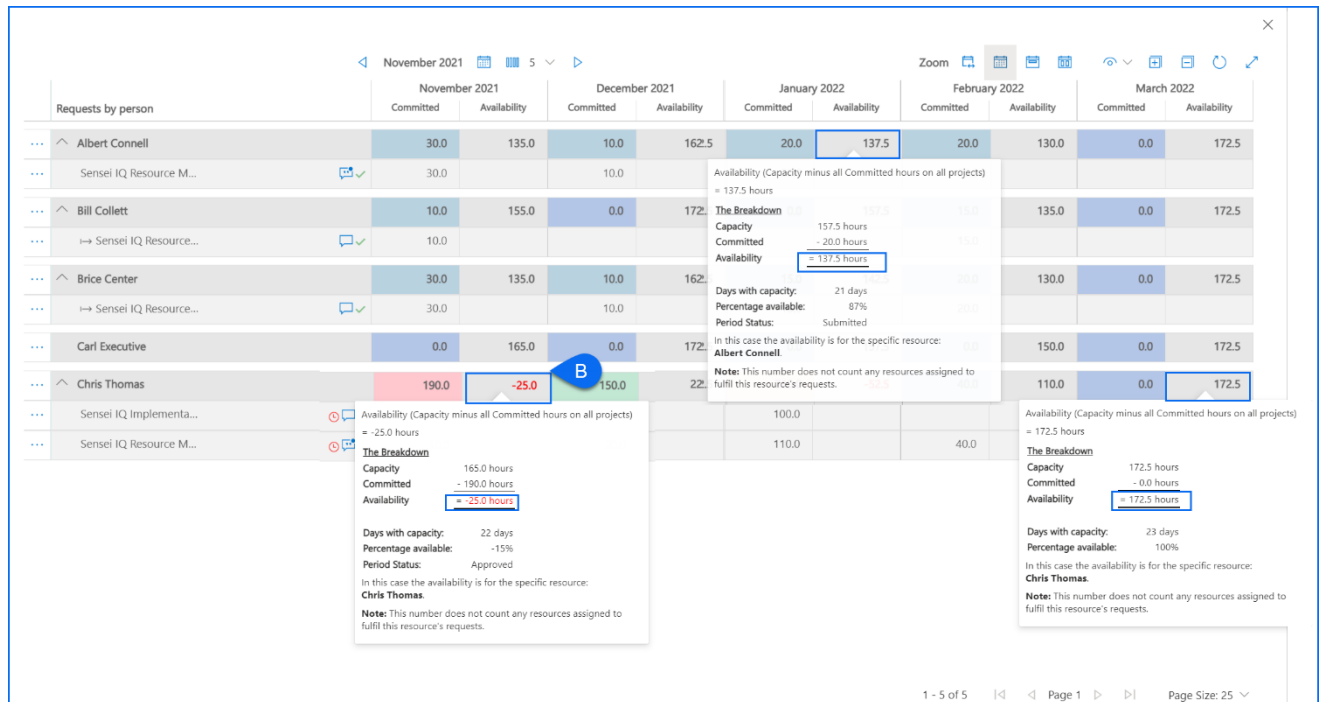
Requests by person	November 2021		December 2021		January 2022		February 2022		March 2022	
	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Albert Connell	30.0	135.0	10.0	162.5	20.0	137.5	20.0	130.0	0.0	172.5
Sensei IQ Resource M...	30.0		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 before. A tooltip for 'Brice Center' is open, showing a comment from Francis Luzuriaga dated Oct 26. The tooltip text includes: '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.', 'I have increased the requested effort for Chris Thomas for November from 40 hours to 50 hours due to a change in scope.', and 'All the work for Chris in this project have been 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	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			

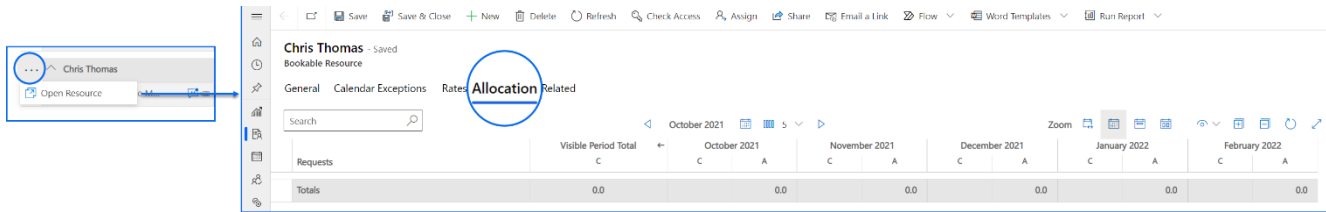
- Hide the comments and evaluate the overall remaining availability of the named resources individually, particularly where a **negative red** value appears in the **Availability** column or the **tooltip text** when you hover the mouse over each visible period.



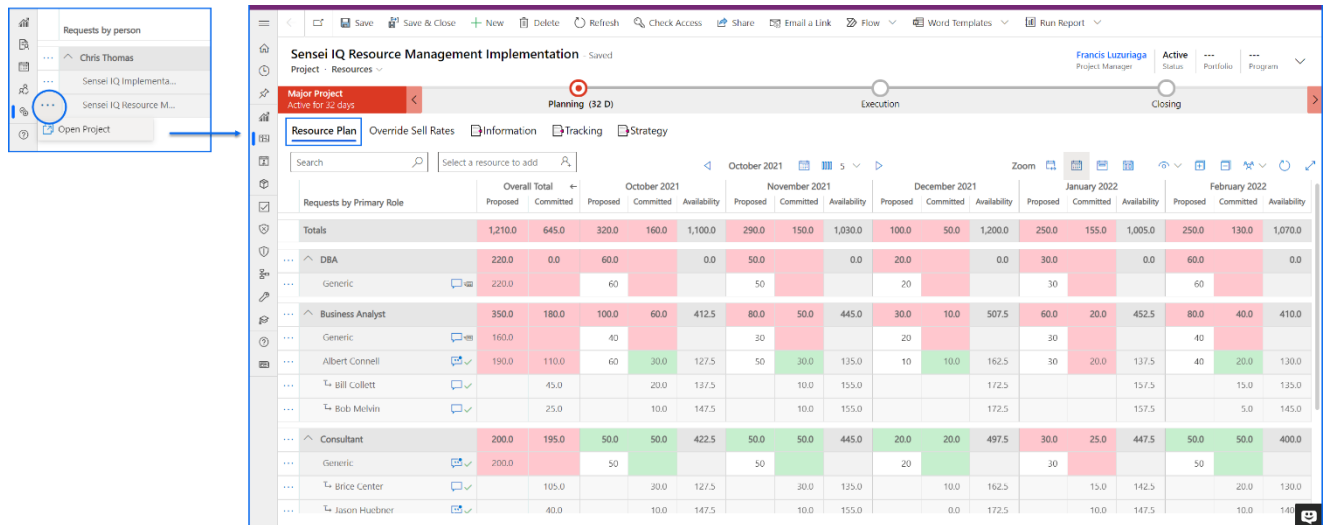
Availability Heatmap Legend:

	<p>Committed work is at least 10% over the resource capacity for the visible period.</p> <p>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.</p> <p>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-utilised.</p>
	<p>There is no committed work for the visible period. It means that the resource is not allocated (under-utilised) and has full availability.</p>

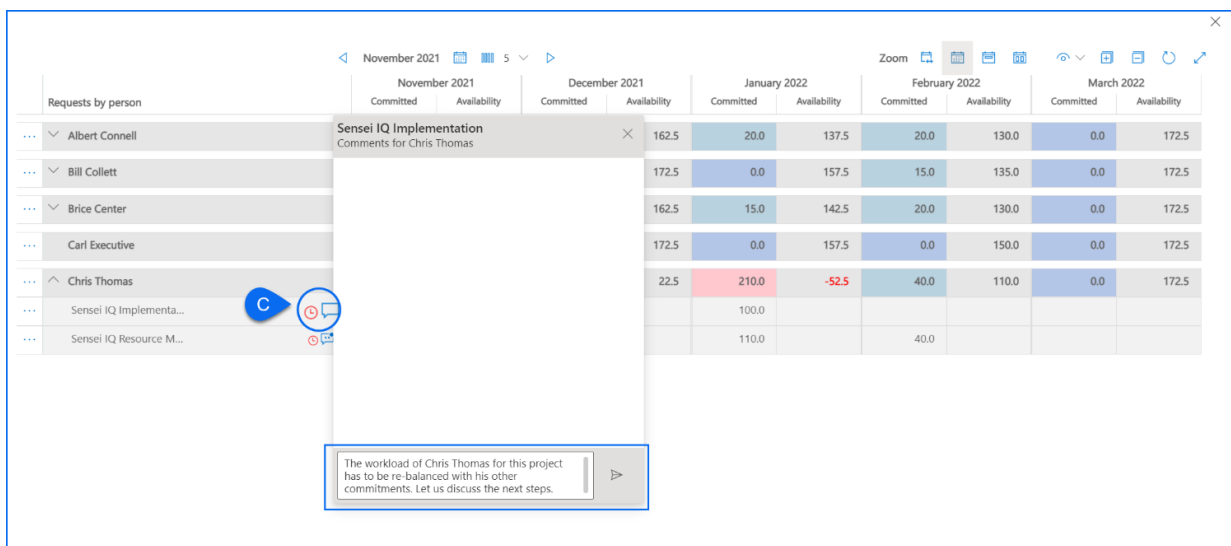
Tip: If you want to further understand the allocation of the selected named resource across other projects, you can click the **Primary Role Menu** button (...) in front of the primary resource role name and then the **Open Resource** button to access the **Allocation** tab of the named resource in a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

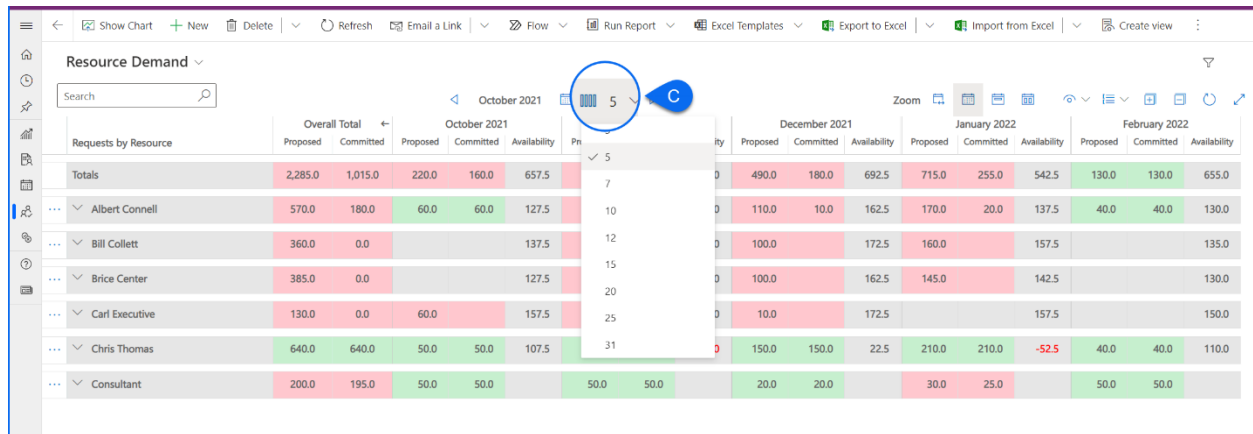
- Ensure that you are in the **Resources** area and click **Resource Demand** in the **Resources** section.

Overall Total		November 2021			December 2021			January 2022			February 2022			March 2022	
Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed
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		
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		
360.0	0.0	100.0		155.0	100.0		172.5	160.0		157.5			135.0		
385.0	0.0	140.0		135.0	100.0		162.5	145.0		142.5			130.0		
130.0	0.0	60.0		165.0	10.0		172.5			157.5			150.0		
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		
200.0	195.0	50.0	50.0		20.0	20.0		30.0	25.0		50.0	50.0			

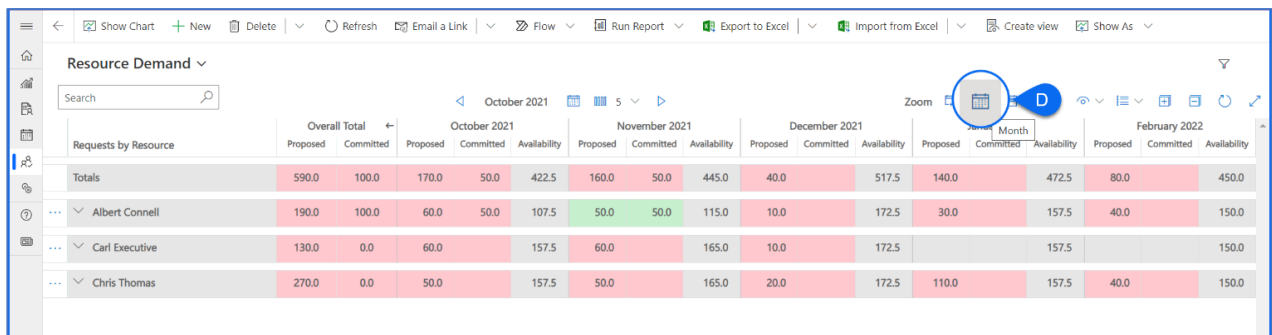
- Change the selected **date** for the first period that you want to review resource availability from.

Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022			March 2022	
Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed
2,285.0	1,015.0	220.0	160.0	657.5	490.0	180.0	692.5	715.0	255.0	542.5	130.0	130.0	655.0					
570.0	180.0	60.0	60.0	127.5	110.0	10.0	162.5	170.0	20.0	137.5	40.0	40.0	130.0					
360.0	0.0			137.5	100.0		172.5	160.0		157.5			135.0					
385.0	0.0			127.5	100.0		162.5	145.0		142.5			130.0					
130.0	0.0	60.0		157.5	10.0		172.5			157.5			150.0					
640.0	640.0	50.0	50.0	107.5	150.0	150.0	-25.0	210.0	210.0	-52.5	40.0	40.0	110.0					
200.0	195.0	50.0	50.0		20.0	20.0		30.0	25.0		50.0	50.0						

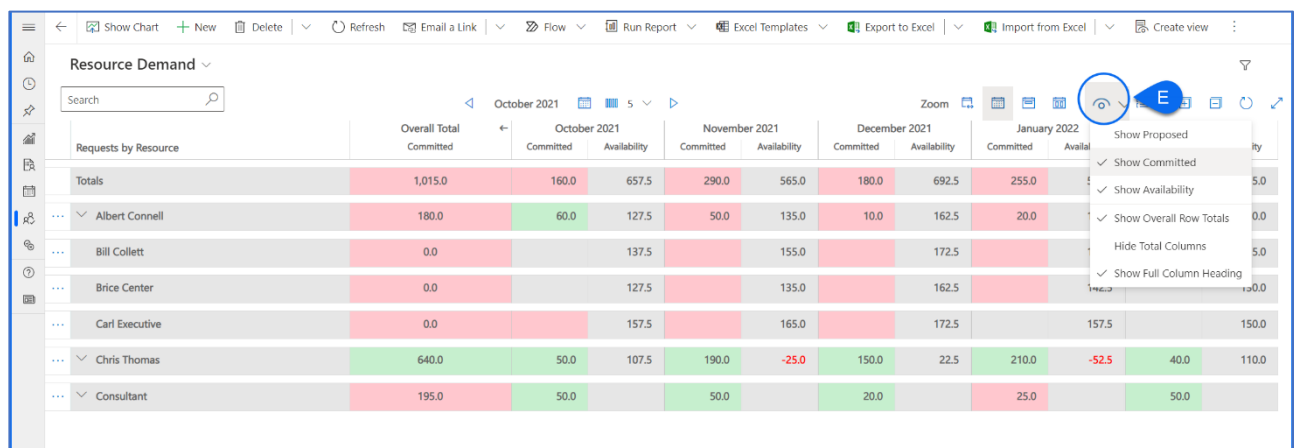
- Set the number of **periods** you want to be visible on the page.



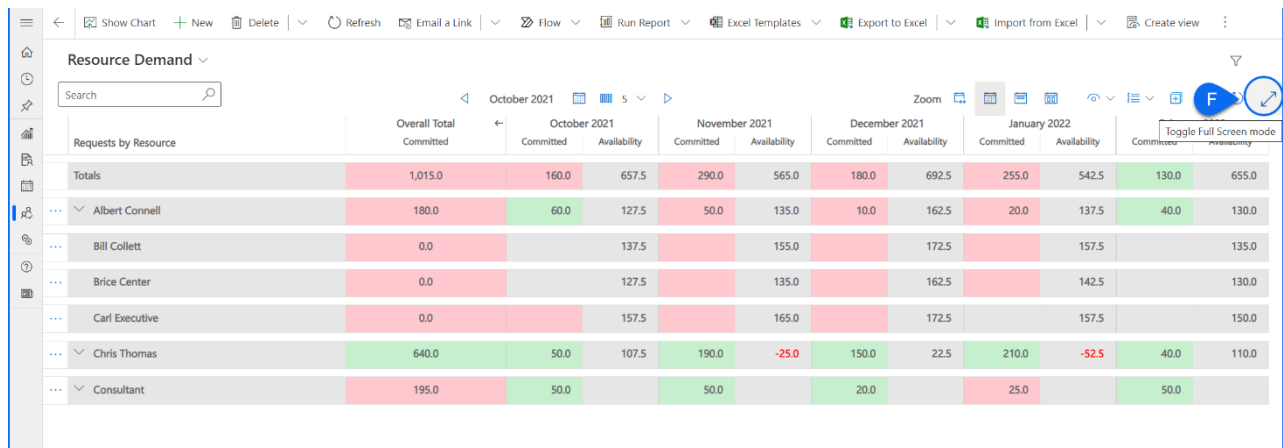
d. Set the **timescale** of the period that you want to review resource availability from using the **Zoom** feature.



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



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



The screenshot shows the 'Resource Demand' view with the 'Requests by Resource' tab selected. The table displays resource allocation data across five months from October 2021 to January 2022. Resources listed include Albert Connell, Bill Collett, Brice Center, Carl Executive, Chris Thomas, and Consultant. Values are shown for Overall Total Committed, and monthly Committed and Availability. Chris Thomas shows a negative availability of -25.0 in November 2021, indicating overallocation.

	Overall Total Committed	October 2021 Committed	October 2021 Availability	November 2021 Committed	November 2021 Availability	December 2021 Committed	December 2021 Availability	January 2022 Committed	January 2022 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.

Show Chart

New

Delete

Refresh

Email a Link

Flow

Run Report

Excel Templates

Export to Excel

Import from Excel

Create view

Resource Demand

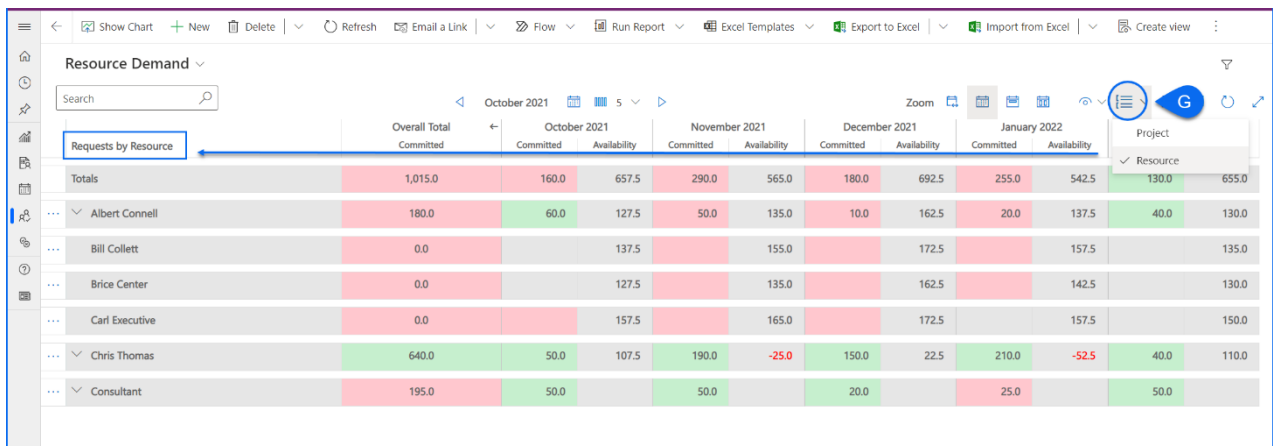
Search

October 2021

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Zoom

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The screenshot shows the 'Resource Demand' view with the 'Requests by Resource' tab selected. This view is identical to the one shown in the first screenshot, displaying resource allocation data for various resources across five months.

	Overall Total Committed	October 2021 Committed	October 2021 Availability	November 2021 Committed	November 2021 Availability	December 2021 Committed	December 2021 Availability	January 2022 Committed	January 2022 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.

Resource Demand		Overall Total Committed	October 2021 Committed	October 2021 Availability	November 2021 Committed	November 2021 Availability	December 2021 Committed	December 2021 Availability	January 2022 Committed	January 2022 Availability	February 2022 Committed	February 2022 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

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

Resource Demand		Overall Total Committed	October 2021 Committed	October 2021 Availability	November 2021 Committed	November 2021 Availability	December 2021 Committed	December 2021 Availability	January 2022 Committed	January 2022 Availability	February 2022 Committed	February 2022 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				137.5		155.0		172.5		157.5		135.0
Brice Center				127.5		135.0		162.5		142.5		130.0
Carl Executive				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												
Walt Nickel												

Sensei IQ Resource Management Implement...

Comments for Chris Thomas

Francis Luzuriaga 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 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 associated work for Chris in this project have been allocated in this view without any amendment from the original request.

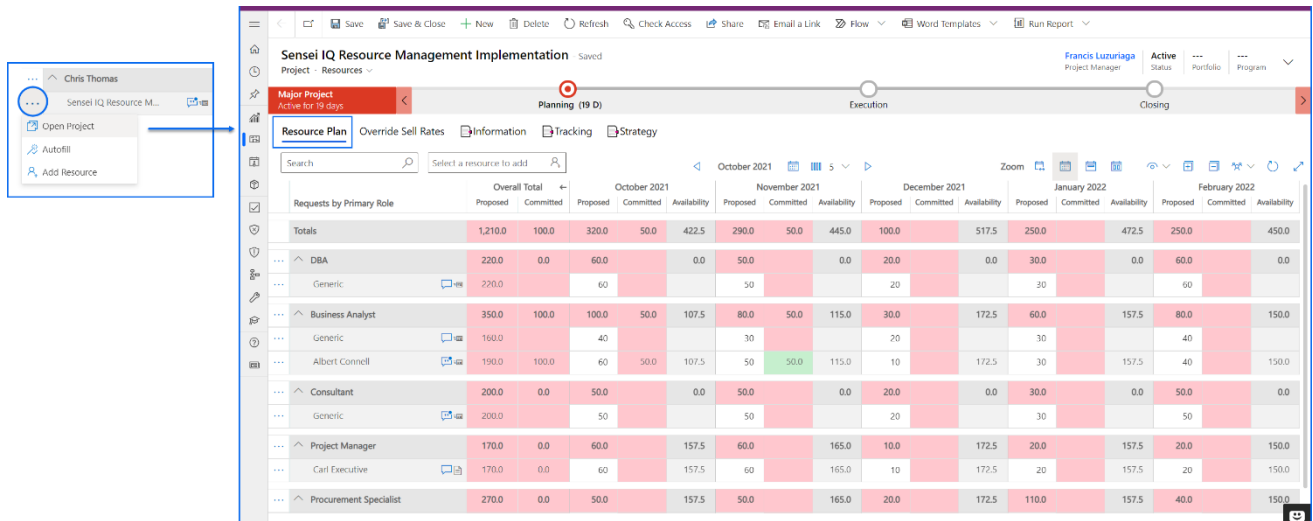
Francis Luzuriaga Oct 27
I have reduced the committed work of Chris in November from 50 to 30 hours as he will be away on leave for 3 days as per conversation.

- 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.

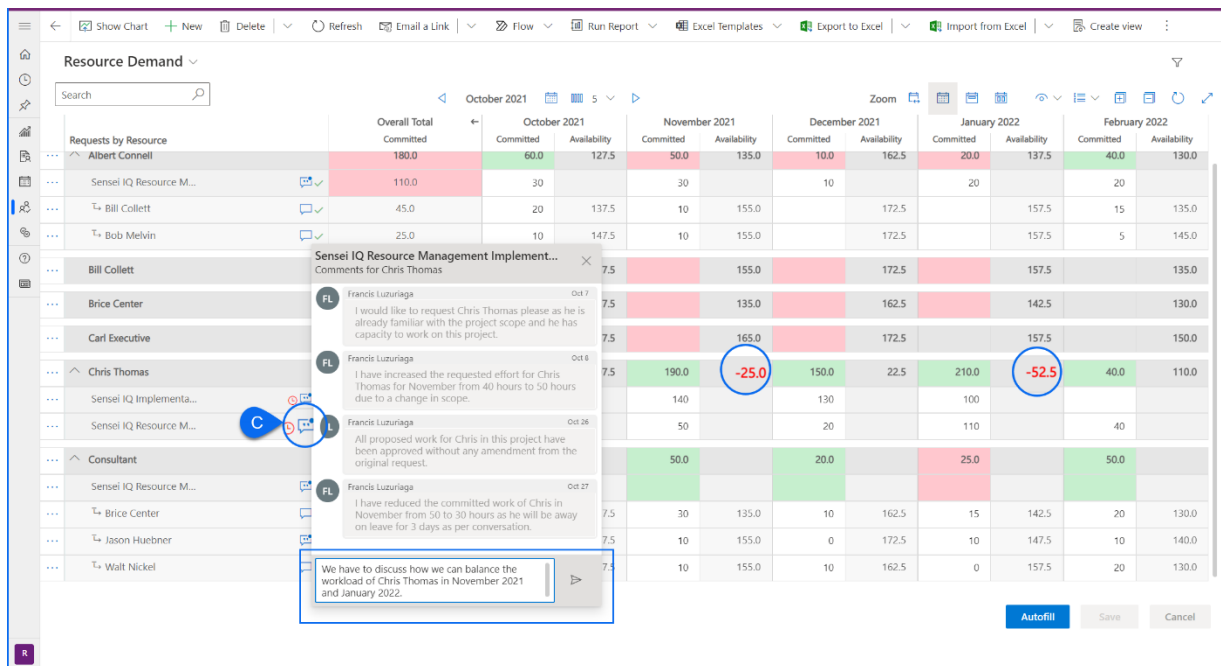
Tip: If you want to further understand the allocation of the selected named resource across other projects, you can click the **Primary Role Menu** button (...) in front of the primary resource role name and then the **Open Resource** button to access the **Allocation** tab of the named resource in a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

Requests	Visible Period Total	October 2021		November 2021		December 2021		January 2022		February 2022	
		C	A	C	A	C	A	C	A	C	A
Totals	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.



- 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**).



Tip: Once the resource overallocation is identified, you can resolve, if not minimise, 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



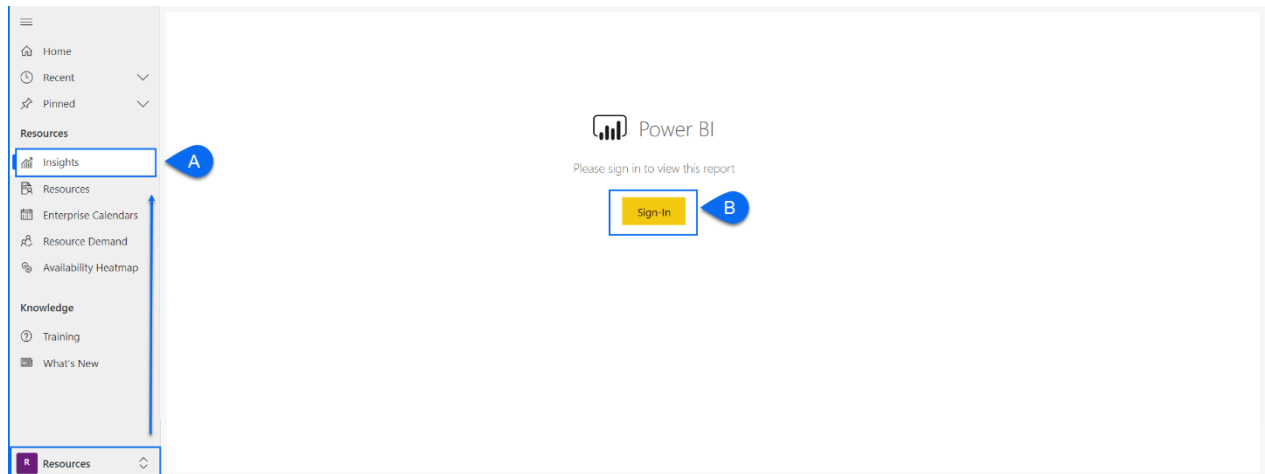
Resource Manager



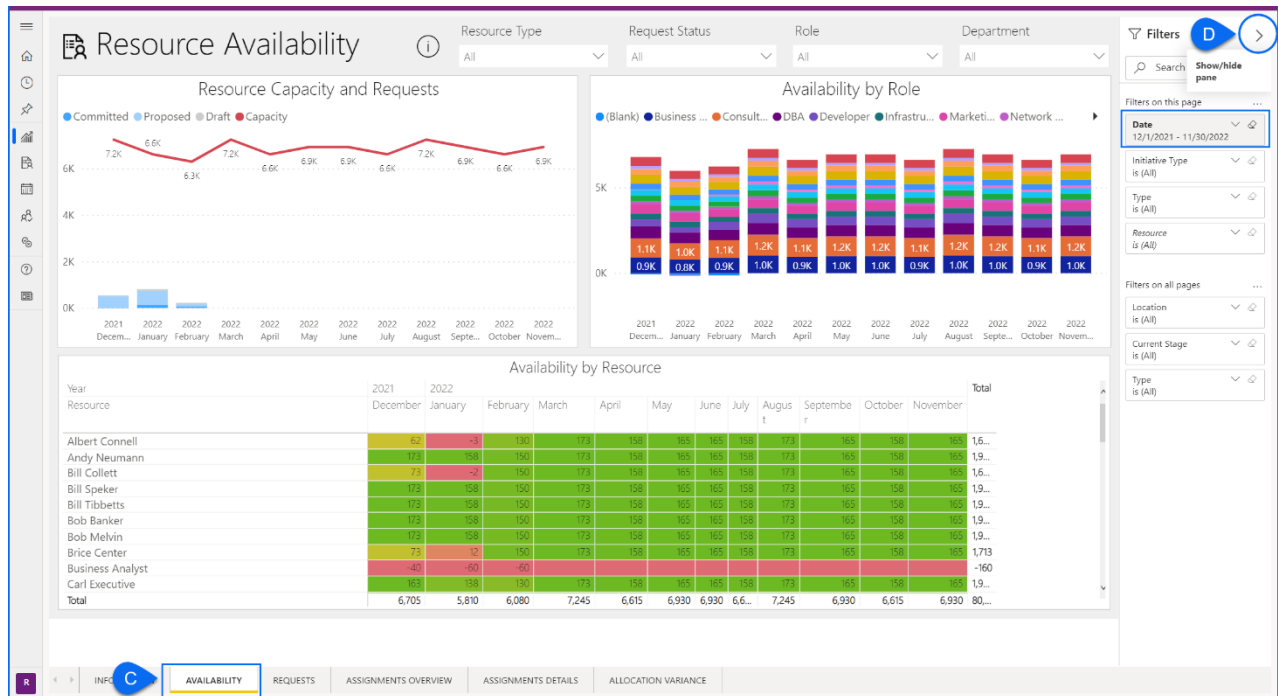
Resources > Resources > Insights

1. SET THE FILTERS IN THE AVAILABILITY REPORT PAGE

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

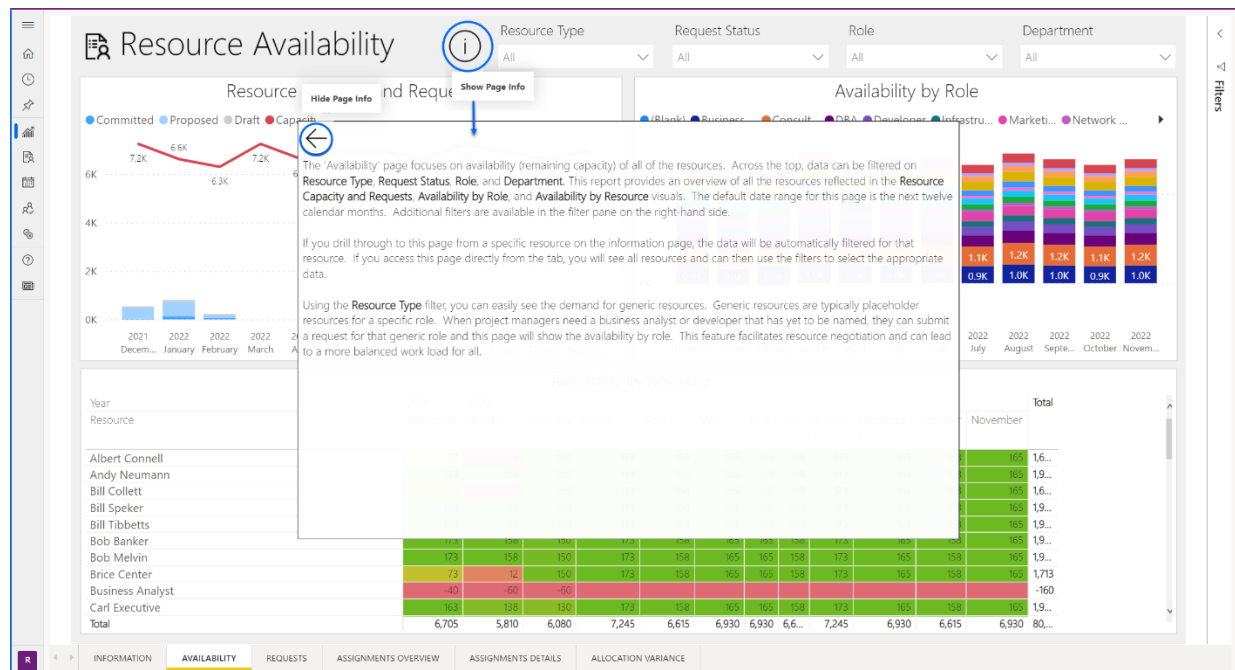


- Select the **Availability** report page using the page navigation menu at the bottom of the page.
- Click the **Show/Hide pane** chevron button to display the **Filters** pane on the right-hand side and validate the **date** range of the data displayed on the page.

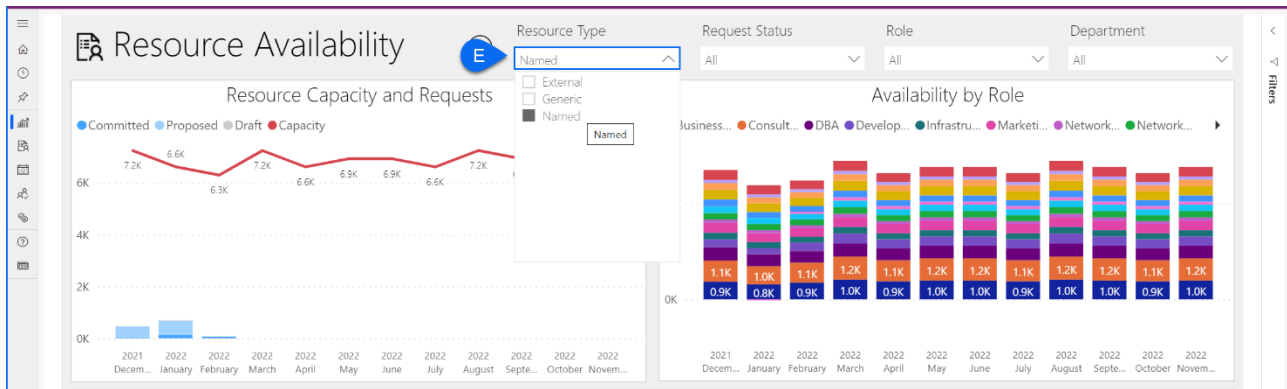


Important: The default date range for this page is the next twelve (12) calendar months.

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



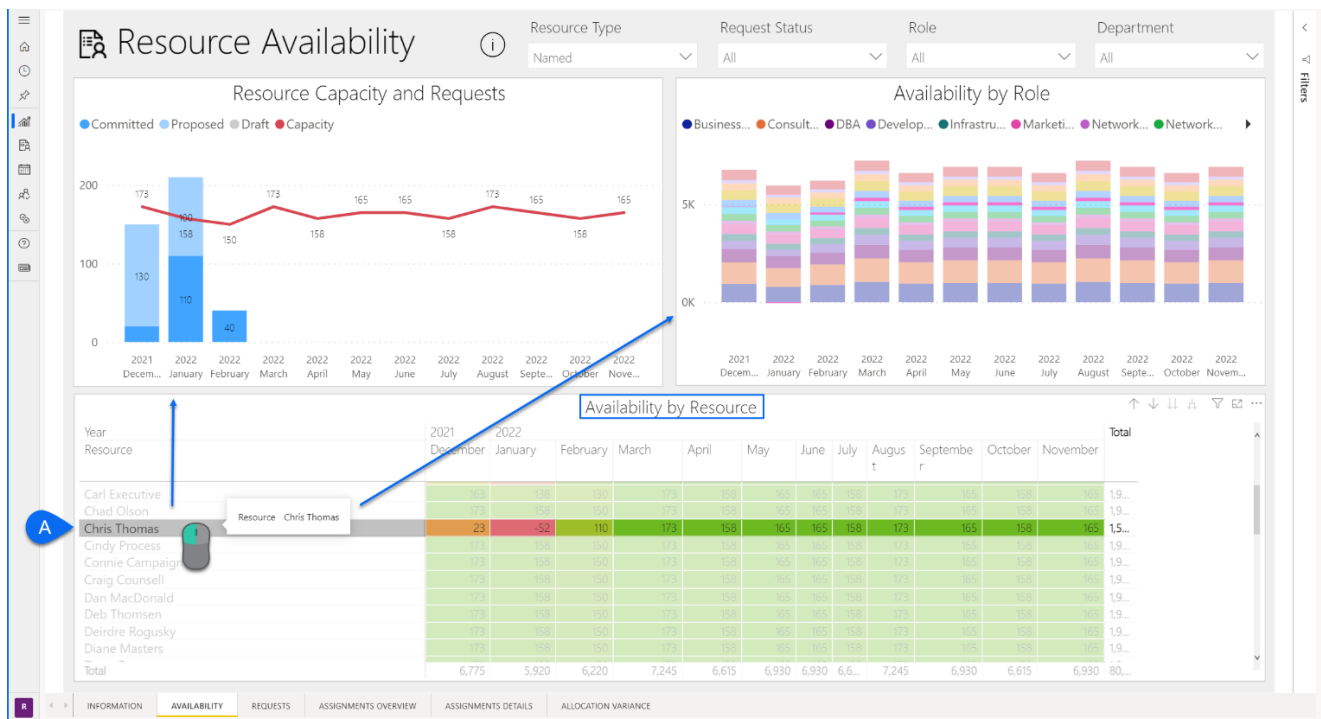
- Select **Named** from the Resource Type filter to focus on the availability of named resources only.



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

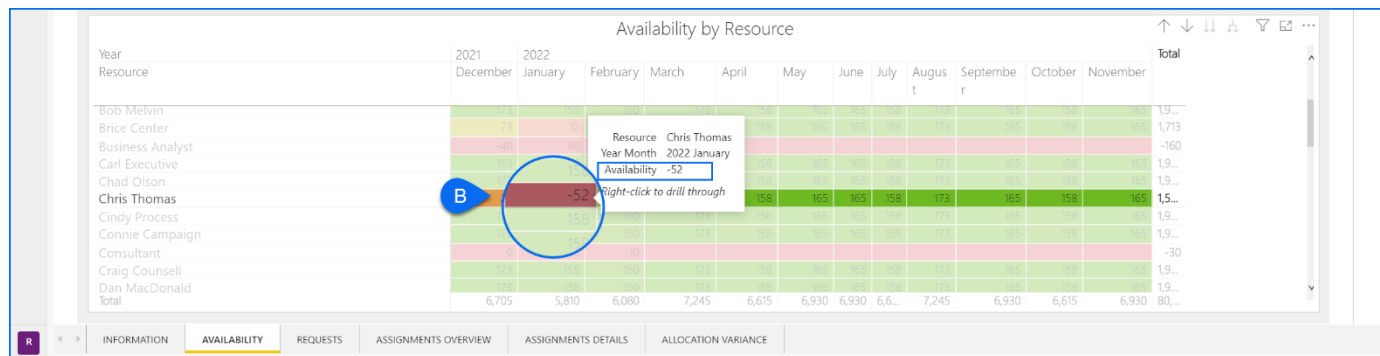
2. EVALUATE WORK ALLOCATION VERSUS AVAILABILITY OF NAMED RESOURCES

- 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.

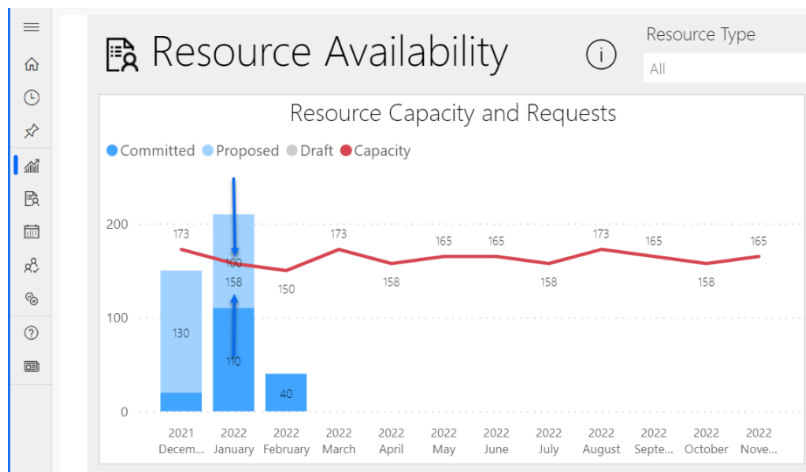
- b. Evaluate the overall remaining availability of the selected named resource/s individually, particularly where a **negative value** in a cell highlighted in **red** appears in a **visible period** or the **tooltip text** when you hover the mouse over each visible period.



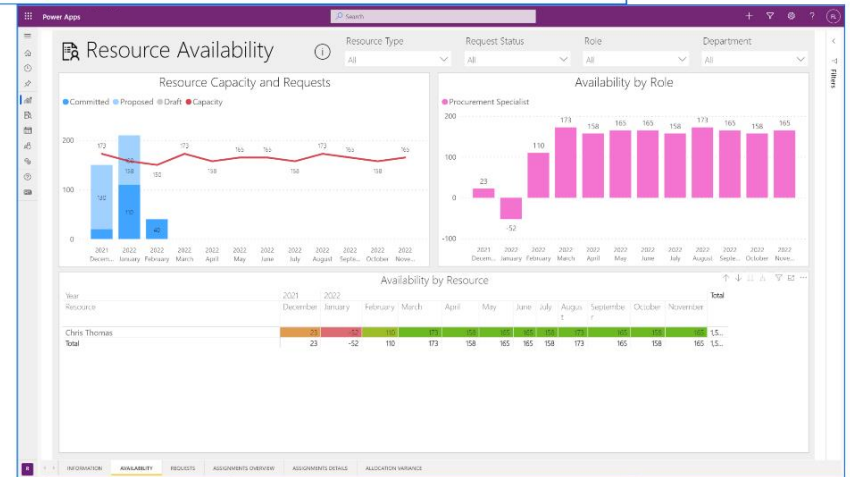
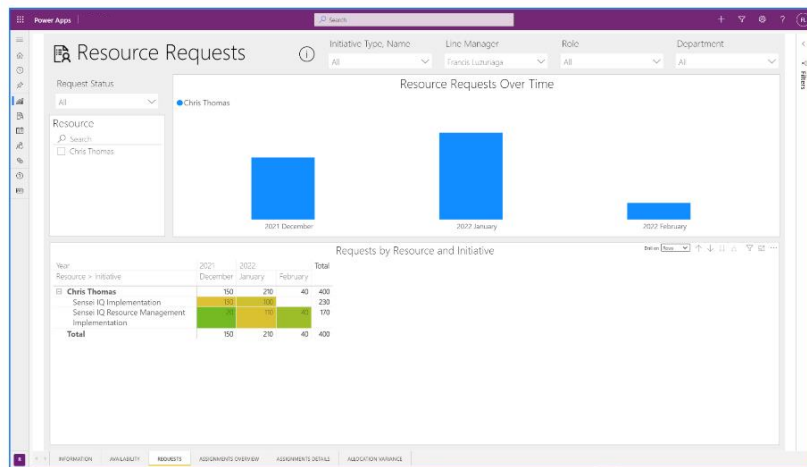
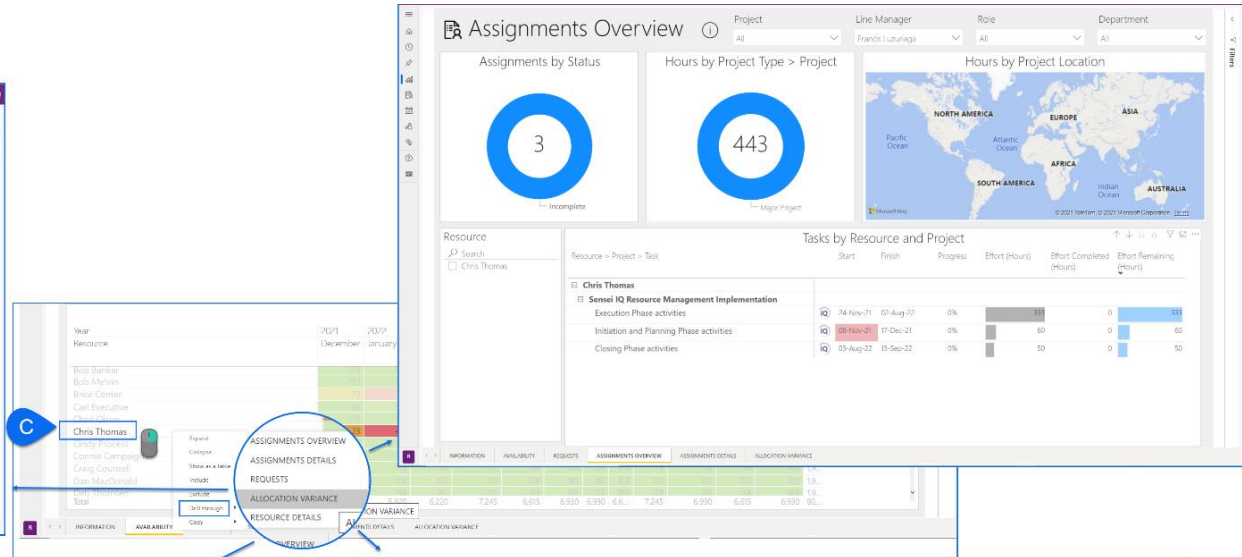
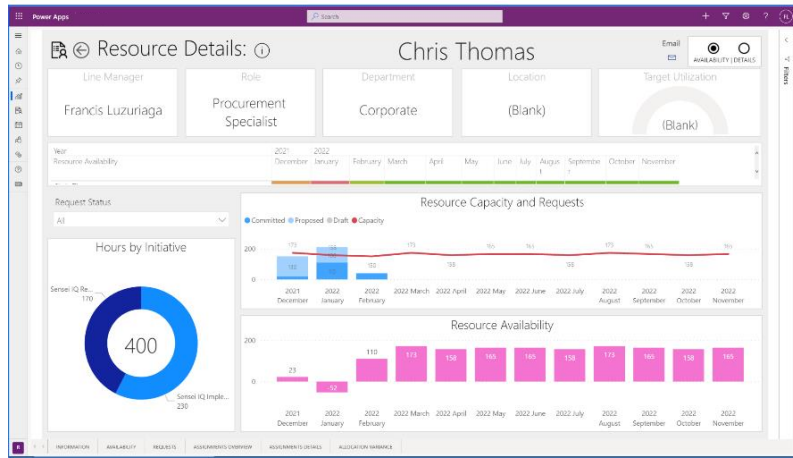
Availability Heatmap Legend:

	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 .
	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 .
	There is no committed work for the visible period. It means that the resource is not allocated (under-utilised) and has full availability .
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 under allocated and has low to high availability, the resource is (under-utilised) .

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 organisational rules, line managers are typically required to monitor the balanced workload against the capacity of their resources across all projects.

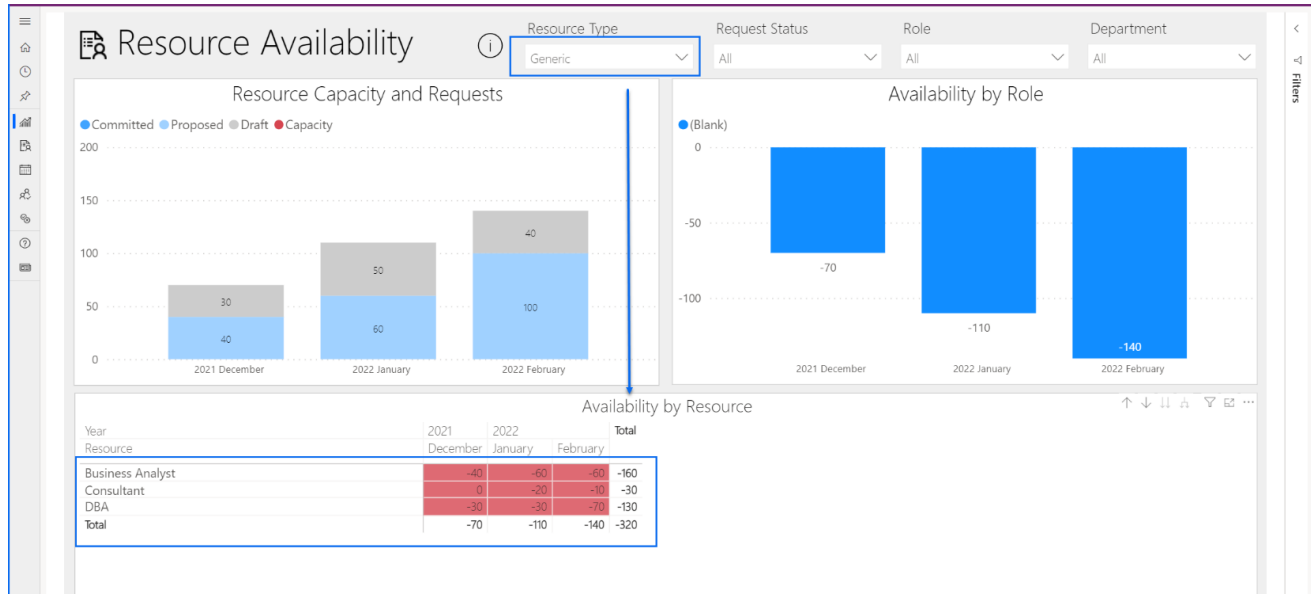


- c. If you want to further investigate on the resource overallocation, right-click on the named resource from the **Availability by Resource** visual and select a report page from the **Drill through** options depending on your area of interest.

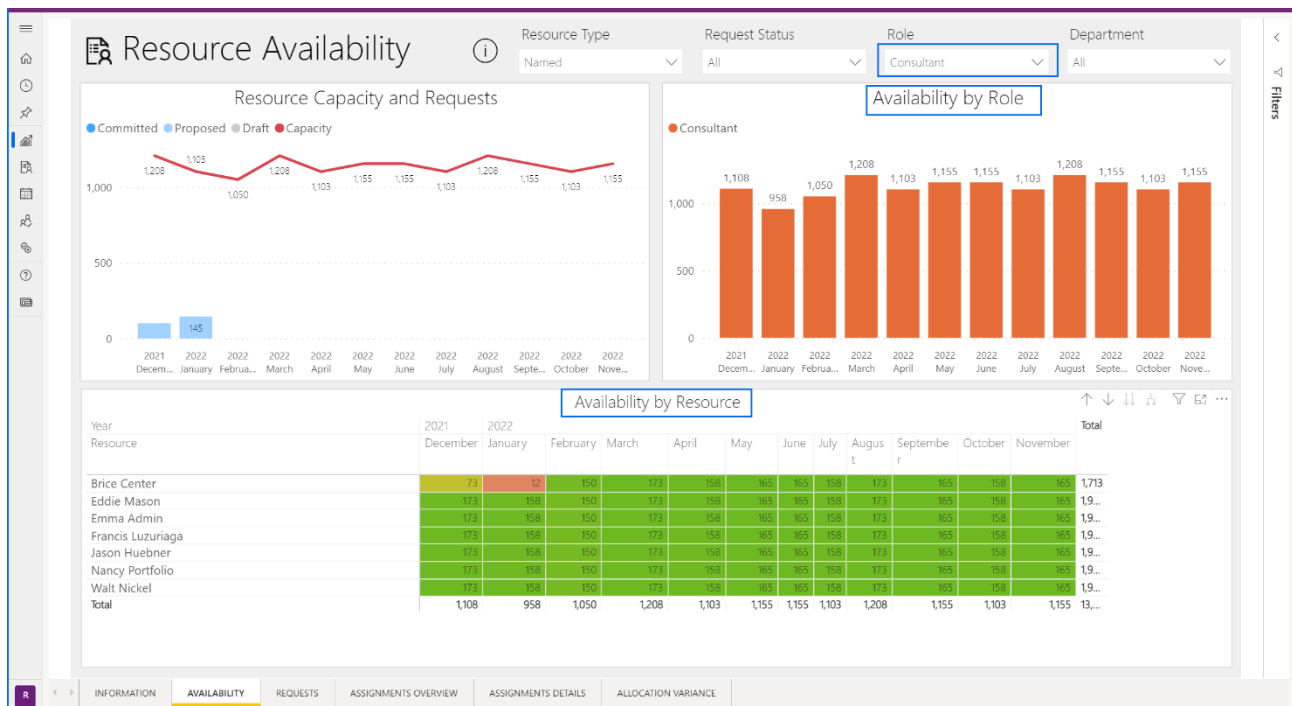


Tip: If you drill through to each of these report pages from the **Availability** report page, the data will be automatically filtered for that selected resource only across the selected page from the **drill-through** options.

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 organisation 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

Resource Manager



Resources > Resources > Allocation

1. SET THE RESOURCE ALLOCATION HORIZON

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

Name	Resource Type	Line Manager	Primary Role	User	Enterprise Calendar
Albert Connell	Named	Francis Luzuriaga	Business Analyst	Albert Connell	Default Calendar
Albert Connell (Project for the Web - Default)	External	---	---	---	---
Albert Connell (Project for the Web)	External	---	---	---	---
Albert Connell (Project Online - PPM Beacon)	External	---	---	---	---
Andy Neumann	Named	---	Project Manager	Andy Neumann	Default Calendar
Bill Collett	Named	Francis Luzuriaga	Developer	Bill Collett	Default Calendar
Bill Speker	Named	---	DBA	Bill Speker	Default Calendar
Bill Speker (Project for the Web)	External	---	---	---	---
Bill Tibbetts	Named	---	Infrastructure Developer	Bill Tibbetts	Default Calendar
Bob Banker	Named	---	Network Architect	Bob Banker	Default Calendar
Bob Brenly (Project for the Web - Default)	External	---	---	---	---
Bob Brenly (Project for the Web)	External	---	---	---	---
Bob Melvin	Named	---	Business Analyst	Bob Melvin	Default Calendar
Bob Melvin (Project for the Web - Default)	External	---	---	---	---
Bob Melvin (Project for the Web)	External	---	---	---	---
Bret Prinz	Named	---	Marketing	Bret Prinz	---
Bret Prinz (Project Online - PPM Beacon)	External	---	---	---	---

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

Name	Resource Type	Line Manager	Primary Role	User	Enterprise Calendar
Chris Thomas	Named	Francis Luzuriaga	Procurement Specialist	Chris Thomas	Default Calendar
Chris Thomas (Project for the Web - Default)	External	---	---	---	---
Chris Thomas (Project for the Web)	External	---	---	---	---

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

Requests	Overall Total Committed	November 2021 Committed	November 2021 Availability	December 2021 Committed	December 2021 Availability	January 2022 Committed	January 2022 Availability	February 2022 Committed	February 2022 Availability	March 2022 Committed	March 2022 Availability
Totals	640.0	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0	172.5	
Projects	640.0	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		20.0		110.0		40.0			

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

Requests	Overall Total Committed	October 2021 Committed	October 2021 Availability	November 2021 Committed	November 2021 Availability	December 2021 Committed	December 2021 Availability	January 2022 Committed	January 2022 Availability	February 2022 Committed	February 2022 Availability
Totals	640.0	50.0	50.0	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0
Projects	640.0	50.0	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	50.0		20.0		110.0		40.0	

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

Requests	Overall Total Committed	October 2021 Committed	October 2021 Availability	November 2021 Committed	November 2021 Availability	December 2021 Committed	December 2021 Availability	January 2022 Committed	January 2022 Availability	February 2022 Committed	February 2022 Availability
Totals	640.0	50.0	50.0	190.0	-25.0	150.0	22.5	210.0	-52.5	40.0	110.0
Projects	640.0	50.0	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	50.0		20.0		110.0		40.0	

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 Committed	October 2021 Availability	November 2021 Committed	November 2021 Availability	December 2021 Committed	December 2021 Availability	January 2022 Committed	January 2022 Availability	February 2022 Committed	February 2022 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 Committed	October 2021 Availability	November 2021 Committed	November 2021 Availability	December 2021 Committed	December 2021 Availability	January 2022 Committed	January 2022 Availability	February 2022 Committed	February 2022 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.

Requests	Overall Total Committed	October 2021 Committed	October 2021 Availability	November 2021 Committed	November 2021 Availability	December 2021 Committed	December 2021 Availability	January 2022 Committed	January 2022 Availability	February 2022 Committed	February 2022 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	

- 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.

Chris Thomas - Saved
Bookable Resource

General Calendar Exceptions Rates **Allocation** Related

Search

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		50.0	22.5		210.0	-52.5		40.0	110.0
Projects	640.0	50.0									210.0			40.0	
Sensei IQ Implementa...	370.0										100.0				
Sensei IQ Resource M...	270.0	50.0									110.0			40.0	

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 selected 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.

Power Apps

Sensei IQ Resource Management Implementation - Saved
Project - Resources

Francis Luzuriaga Project Manager Active Status Portfolio Program

Major Project Active for 32 days Planning (32 D) Execution Closing

Resource Plan Override Sell Rates Information Tracking Strategy

Search Select a resource to add

Requests by Primary Role	Proposed	Committed	October 2021			November 2021			December 2021			January 2022			February 2022		
			Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
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	220.0	0.0	60.0	0.0	0.0	50.0	0.0	0.0	20.0	0.0	0.0	30.0	0.0	0.0	60.0	0.0	0.0
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	410.0
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		
Brice Center		105.0		30.0	127.5		30.0	135.0		10.0	162.5		15.0	142.5		20.0	130.0
Jason Huebner		40.0		10.0	147.5		10.0	155.0			172.5		10.0	147.5		10.0	140.0

- 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**).

Chris Thomas - Saved
Bookable Resource

General Calendar Exceptions Rates **Allocation** Related

Search

Requests

Totals

Projects

Sensei IQ Implementa...

Sensei IQ Resource M...

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
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
5	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			

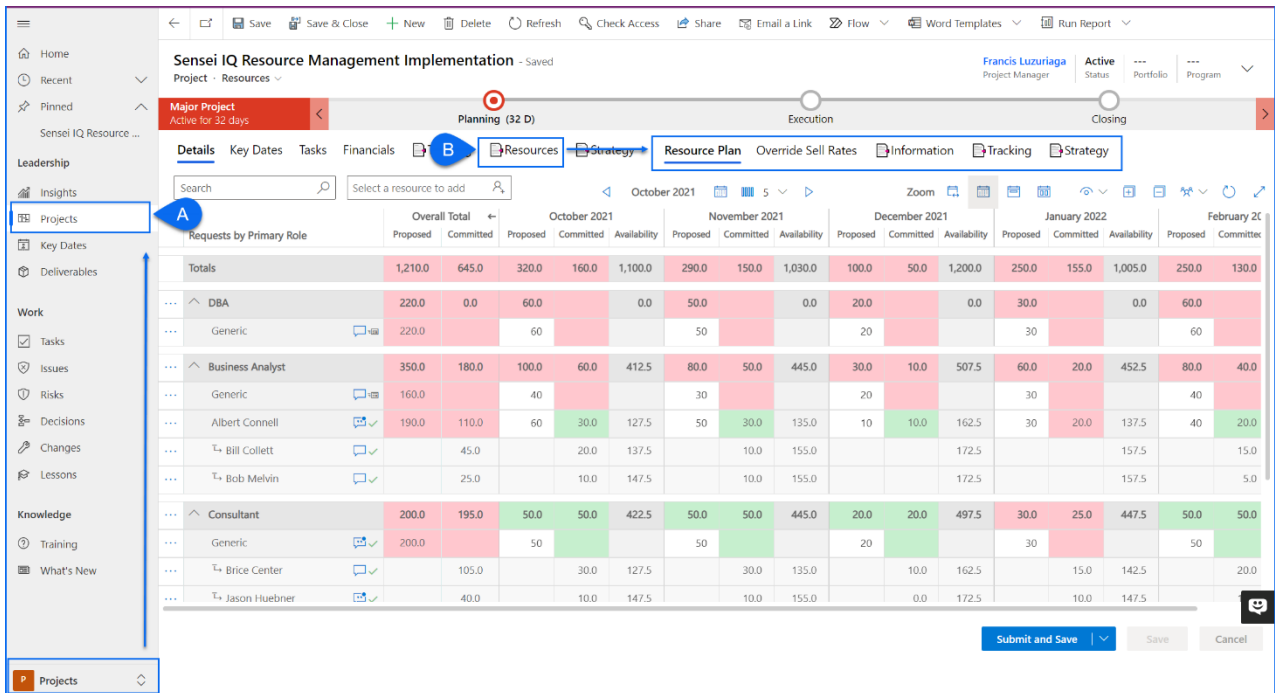
Tip: Once the resource overallocation is identified, you can resolve, if not minimise, the overallocation in agreement with the respective project managers by following the steps outlined in section **3. Modify an existing fulfilled request for named resources** from a related downloadable titled **JOB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

Identify resource allocation from the Resource Plan tab

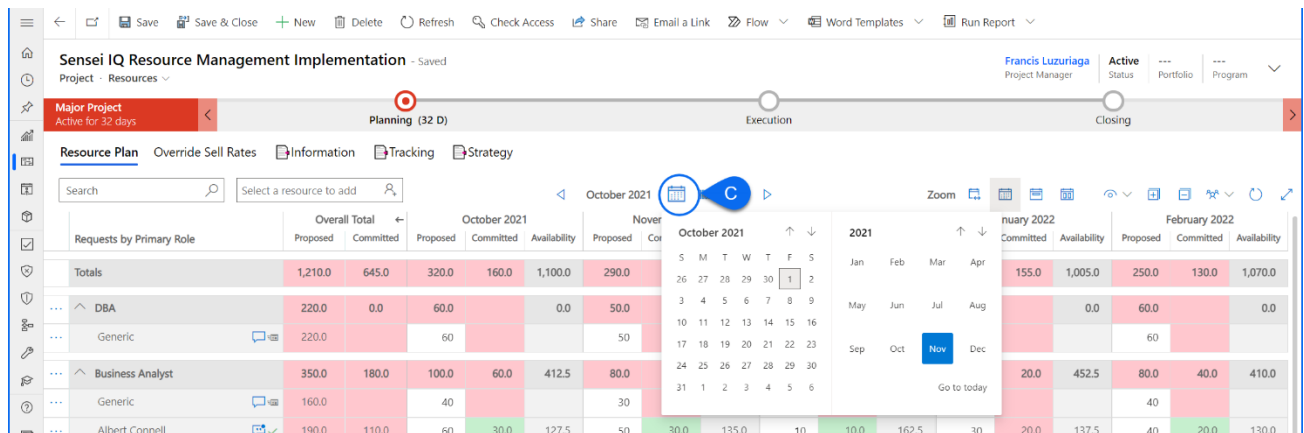
Resource Manager Projects > Leadership > Projects > Resources > Resource Plan

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.



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



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.

Save

Save & Close

New

Delete

Refresh

Check Access

Share

Email a Link

Zoom

Word Templates

Run Report

Sensei IQ Resource Management Implementation

Saved

Francis Luzuriaga

Project Manager

Active

Status

Portfolio

Program

Project - Resources

Major Project

Active for 32 days

Planning (32 D)

Execution

Closing

Resource Plan

Override Sell Rates

Information

Tracking

Strategy

Search

Select a resource to add

October 2021

November 2021

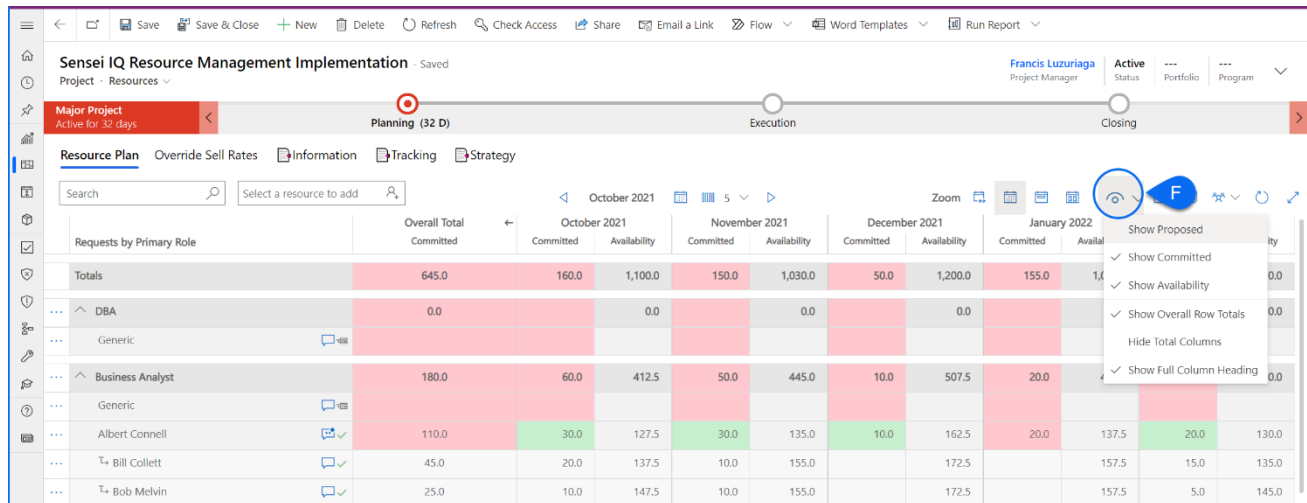
December 2021

January 2022

February 2022

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	Availability
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	220.0	0.0	60.0		0.0	50.0		0.0	20.0		0.0	30.0		0.0	60.0		0.0
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	410.0
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

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.



Sensei IQ Resource Management Implementation - Saved

Project - Resources

Major Project Active for 32 days

Planning (32 D) Execution Closing

Resource Plan Override Sell Rates Information Tracking Strategy

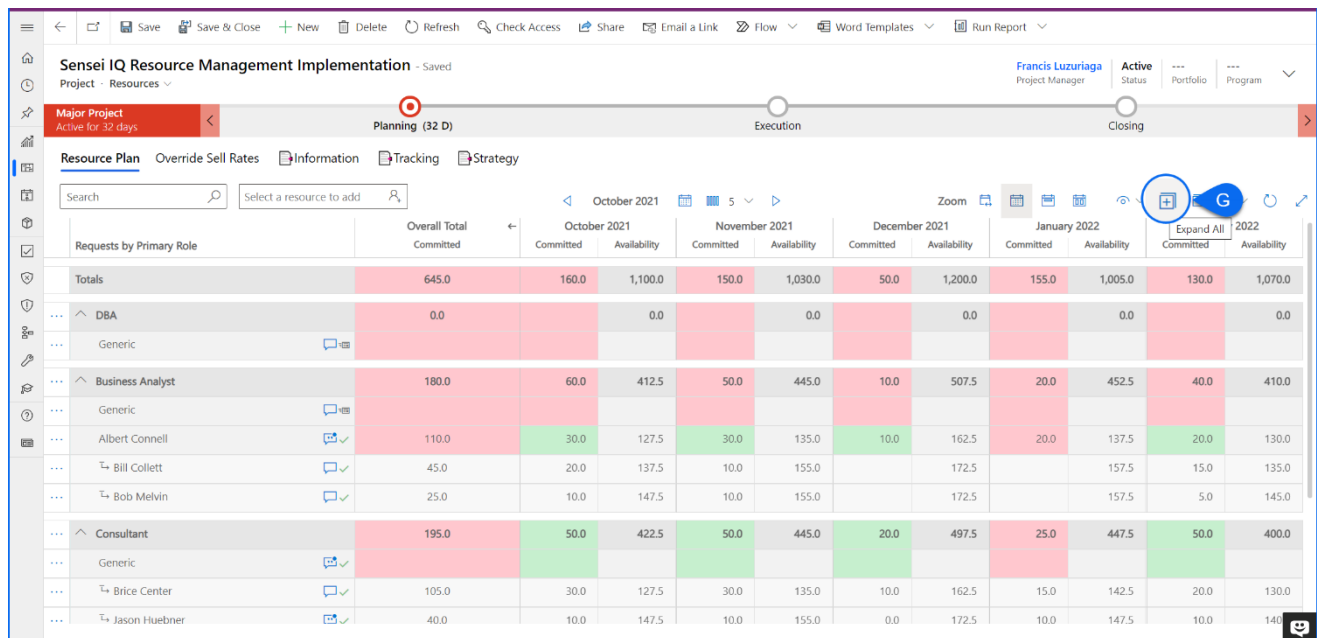
Search Select a resource to add

October 2021 November 2021 December 2021 January 2022

Requests by Primary Role	Overall Total Committed	October 2021 Committed	October 2021 Availability	November 2021 Committed	November 2021 Availability	December 2021 Committed	December 2021 Availability	January 2022 Committed	January 2022 Availability
Totals	645.0	160.0	1,100.0	150.0	1,030.0	50.0	1,200.0	155.0	1,005.0
DBA	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
Generic									
Albert Connell	110.0	30.0	127.5	30.0	135.0	10.0	162.5	20.0	137.5
Bill Collett	45.0	20.0	137.5	10.0	155.0		172.5		157.5
Bob Melvin	25.0	10.0	147.5	10.0	155.0		172.5		157.5

Expand All

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



Sensei IQ Resource Management Implementation - Saved

Project - Resources

Major Project Active for 32 days

Planning (32 D) Execution Closing

Resource Plan Override Sell Rates Information Tracking Strategy

Search Select a resource to add

October 2021 November 2021 December 2021 January 2022

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

Expand All

2. EVALUATE WORK ALLOCATION VERSUS AVAILABILITY OF NAMED RESOURCES

- Use the **Search** field to look up the named resource from the **Resource Plan** screen.
- 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.

Sensei IQ Resource Management Implementation - Saved

Project: Resources

Major Project: Active for 32 days

Planning (32 D)

Execution

Closing

Resource Plan

Override Sell Rates

Information

Comments for Chris Thomas

Chris Thomas

Requests by Primary Role

Totals

Procurement Specialist

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 the original request.

Francis Luzuriaga Oct 27

Over allocated in this view! I've 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 5

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

	November 2021		December 2021		January 2022		February 2022	
	Committed	Availability	Committed	Availability	Committed	Availability	Committed	Availability
Totals	150.0	1,030.0	50.0	1,200.0	155.0	1,005.0	130.0	1,070.0
Procurement Specialist	50.0	-25.0	20.0	22.5	110.0	-52.5	40.0	110.0
Chris Thomas	50.0	-25.0	20.0	22.5	110.0	-52.5	40.0	110.0

- 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.

Sensei IQ Resource Management Implementation - Saved

Project: Resources

Major Project: Active for 32 days

Planning (32 D)

Execution

Closing

Resource Plan

Override Sell Rates

Information

Tracking

Strategy

Chris Thomas

Select a resource to add

Requests by Primary Role

Totals

Procurement Specialist

Chris Thomas

	Overall Total Committed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Committed	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	130.0	1,070.0
Procurement Specialist	270.0	50.0	107.5	50.0	-25.0	20.0	22.5	110.0	-52.5	40.0	110.0
Chris Thomas	270.0	50.0	107.5	50.0	-25.0	20.0	22.5	110.0	-52.5	40.0	110.0

Availability (Capacity minus all Committed hours on all projects)
= -25.0 hours

The Breakdown

Capacity 165.0 hours

Committed (elsewhere) - 140.0 hours

Committed (here) - 50.0 hours

Availability = -25.0 hours

Days with capacity: 22 days

Percentage available: -15%

Period Status: Approved

Click the value to copy to Proposed.

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.

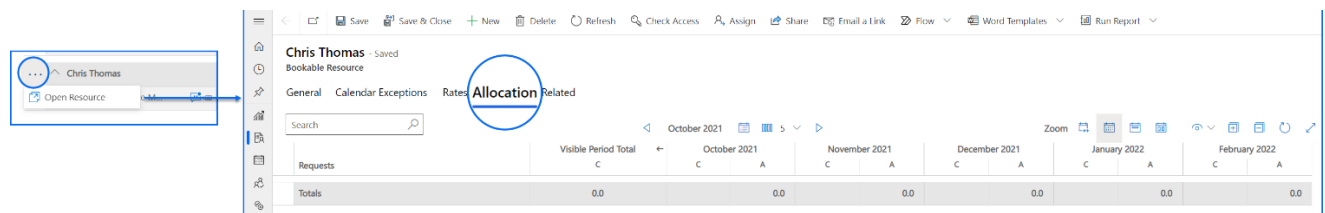
Committed	Availability	Availability (Capacity minus all Committed hours on all projects)
1,100.0	150.0	1,030.0
107.5	50.0	-25.0
107.5	50.0	-25.0

The Breakdown

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

Days with capacity: 22 days
Percentage available: -15%
Period Status: Approved
Click the value to copy to Proposed.

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 **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**).

Sensei IQ Resource Management Implementation - Saved

Project - Resources

Major Project Active for 32 days

Planning (32 D)

Execution

Closing

Francis Luzuriaga Project Manager

Active Status Portfolio Program

Resource Plan

Override Sell Rates

Information

Sensei IQ Resource Management Implement...

Comments for Chris Thomas

FL 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.

FL Francis Luzuriaga Oct 28

All proposed work for Chris in this project have been approved without any amendment from the original request.

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

Committed	Availability	Availability (Capacity minus all Committed hours on all projects)
0.0	150.0	1,030.0
7.5	50.0	-25.0
7.5	50.0	-25.0

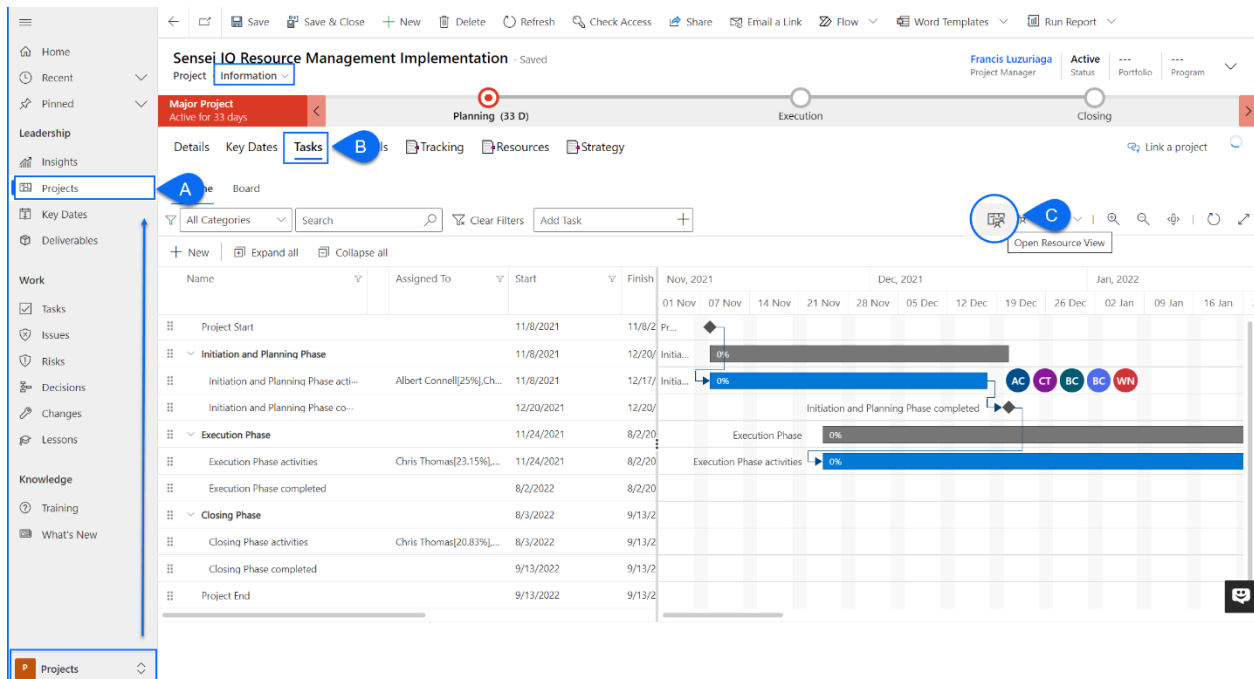
Tip: Once the resource overallocation is identified, you can resolve, if not minimise, the overallocation in agreement with the respective project managers by following the steps outlined in **section 3. Modify an existing fulfilled request for named resources** from a related downloadable titled **JOB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

Identify resource allocation from the Resource View

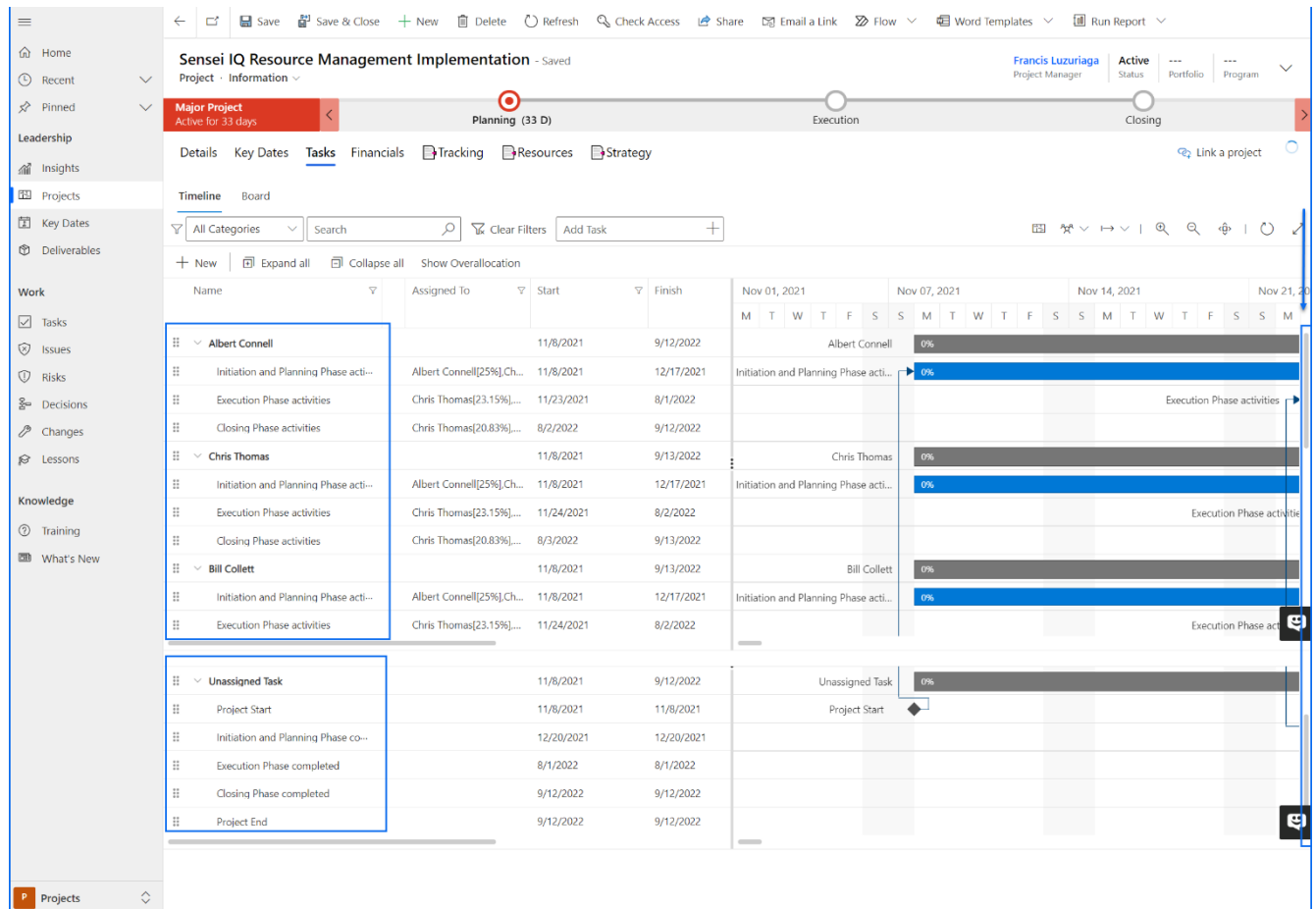
 Project Manager  Projects > Leadership > Projects > Tasks > Resource View

1. APPLY THE RESOURCE VIEW IN THE PROJECT PLAN

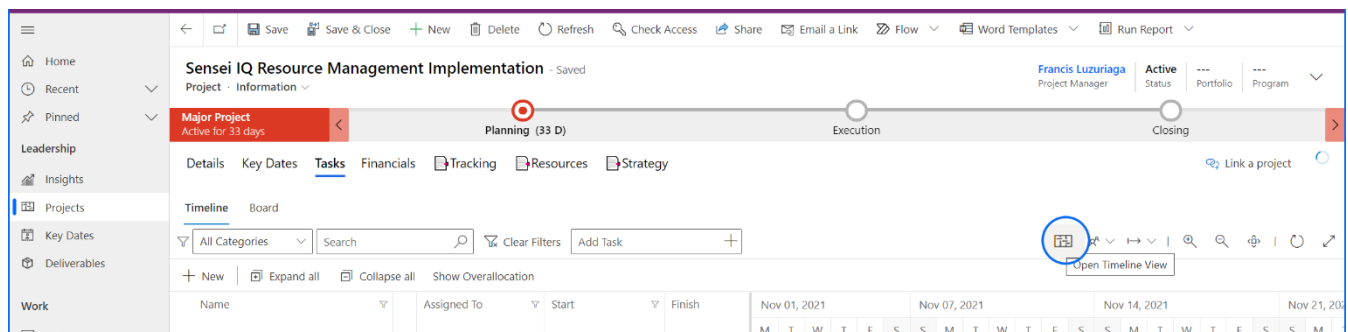
- Ensure you are in the **Project** area and click **Projects** in the **Leadership** section.
- Open the project record then navigate to the **Tasks** tab of the **Information** segment.
- Select the **Open Resource View** option from the command bar above the Gantt chart window to apply the **Resource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



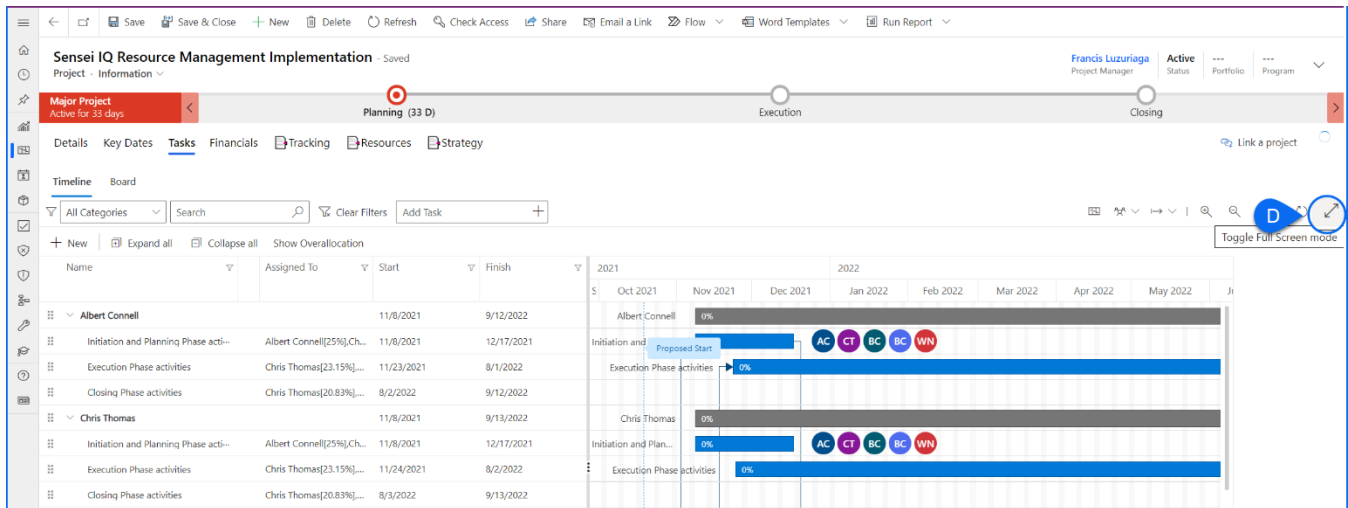
Important: The **Resource View** switches the default **Timeline View** displaying a *work breakdown structure* to a *resource breakdown view* with a Gantt chart that visualises the list of tasks assigned to each resource in a hierarchical manner on task editing mode. Use the vertical scroll bar to view 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.



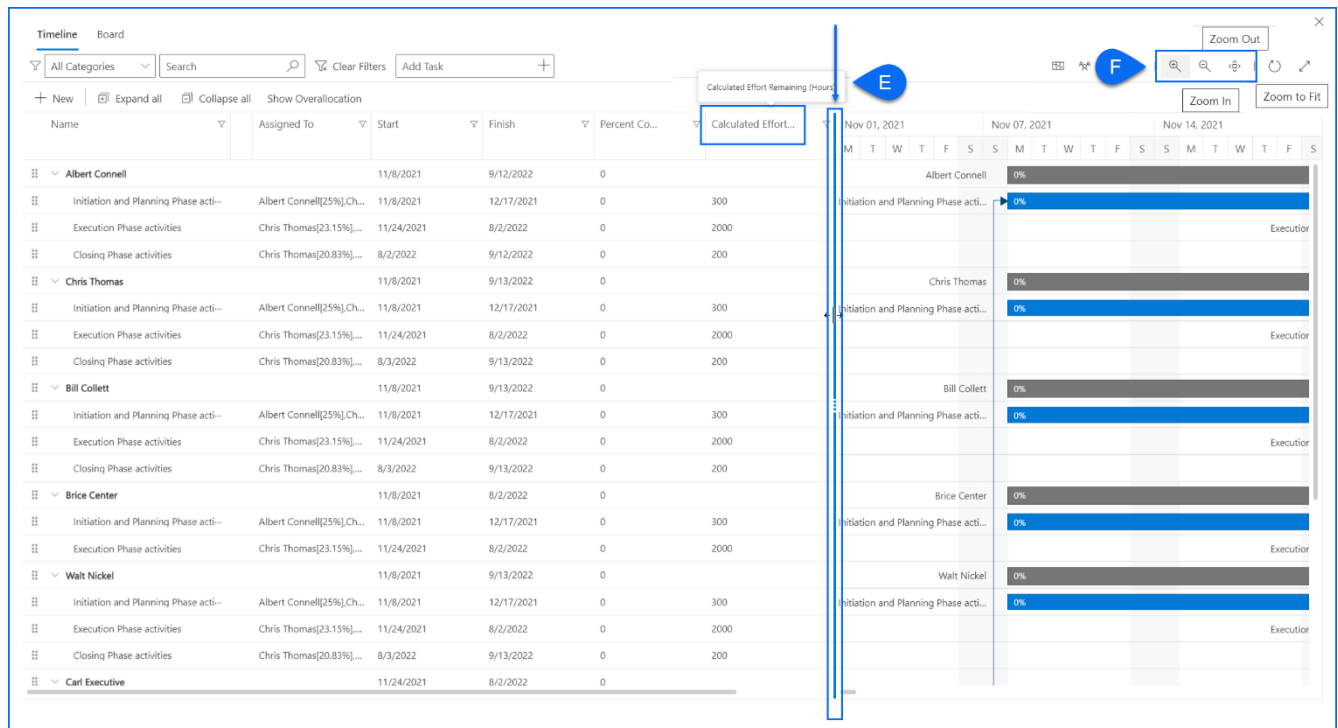
Tip: Selecting the **Open Timeline View** option from the command bar switches the **Resource View** back to the default view displaying the *work breakdown structure* and a Gantt chart.



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

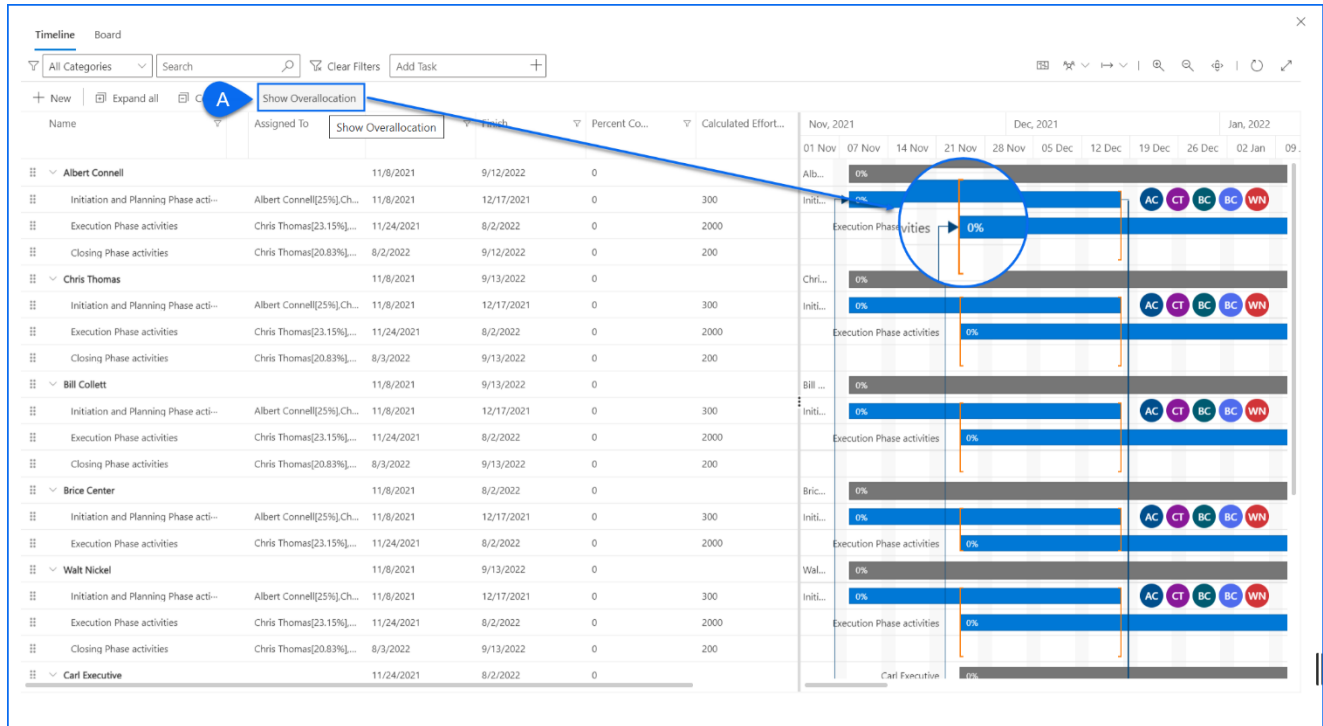


- Drag the **vertical splitter bar** and drop it to the right edge of the **Calculated Effort Remaining Hours** ensuring that the Gantt chart remains visible on the other half of the screen.
- Use the **Zoom In**, **Zoom Out** or **Zoom to Fit** buttons to control the timescale of the Gantt chart displayed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



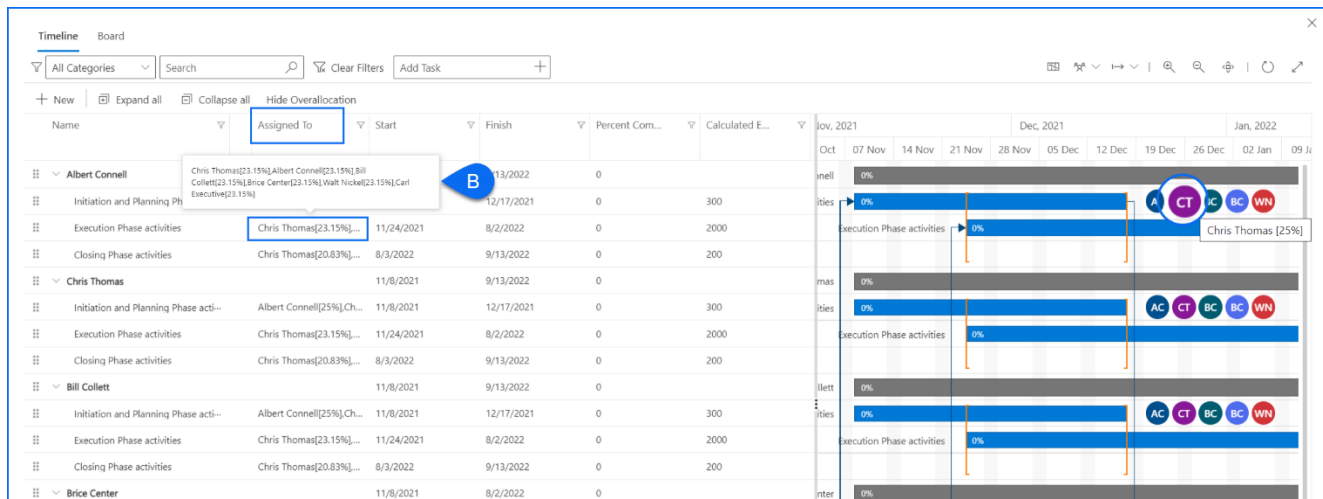
2. EVALUATE WORK ASSIGNMENTS OF NAMED RESOURCES

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

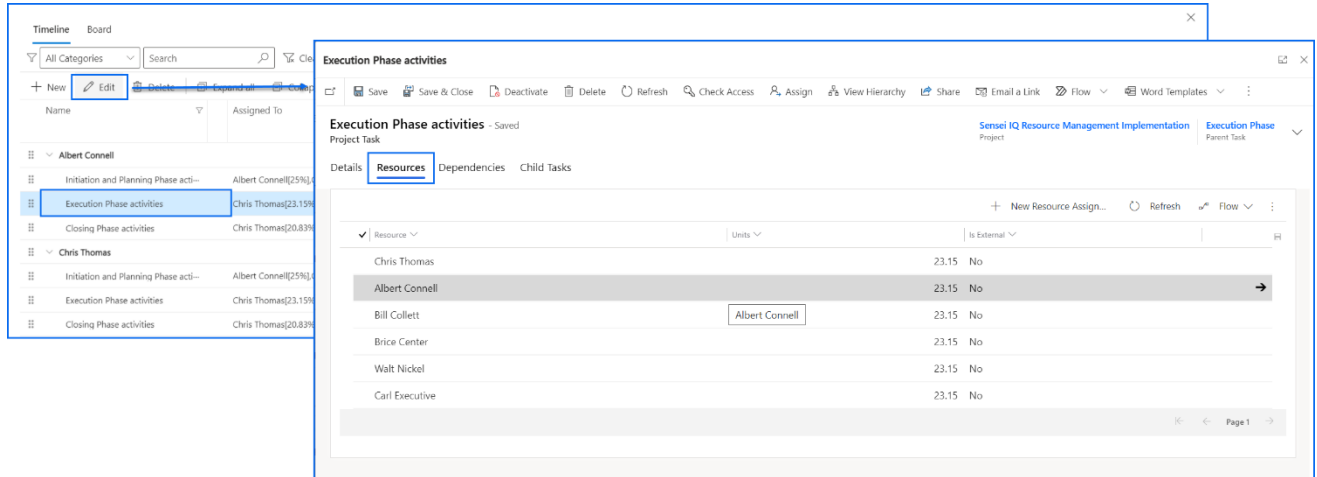


Important: When a resource is assigned with two or more tasks which are scheduled on the same date or period, effectively **overlapping work assignments** (regardless of the *target utilisation rate*, *calculated effort*, *resource capacity*, and *committed work by the line manager*), it is automatically 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.

- 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 utilisation displayed in the **Units** column of the **Resources** tab.



The screenshot shows the ALTUS software interface. On the left, a sidebar lists tasks under 'Albert Connell' and 'Chris Thomas'. The 'Execution Phase activities' task is highlighted. The main window displays the 'Execution Phase activities' dialog box with the 'Resources' tab selected. The dialog shows a list of resources and their utilization rates.

Resource	Units	Is External
Chris Thomas	23.15	No
Albert Connell	23.15	No
Bill Collett	23.15	No
Brice Center	23.15	No
Walt Nickel	23.15	No
Carl Executive	23.15	No

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 organisational rules, the project manager may be required to consistently optimise 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

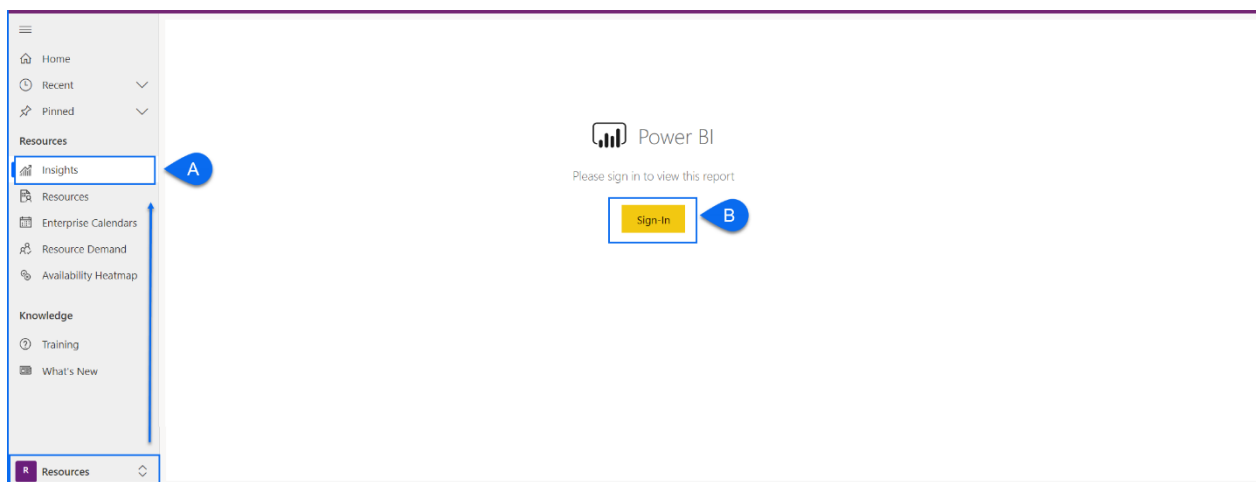
 Resource Manager



Resources > Resources > Insights

1. SET THE FILTERS IN THE ALLOCATION VARIANCE REPORT PAGE

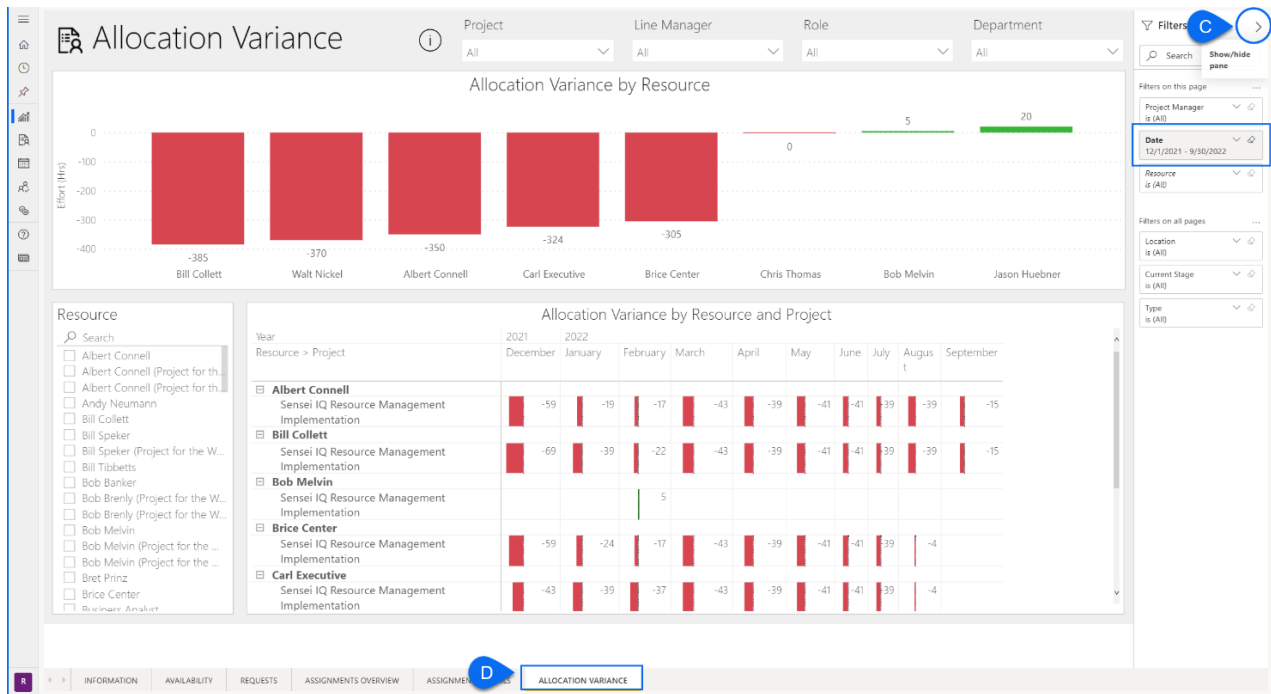
- Ensure that you are in the **Resources** area and click **Insights** in the **Resources** section.
- Click the **Sign-in** button (if prompted) to load the pre-configured Power BI report on the page.



- Select the **Allocation Variance** report page using the page navigation menu at the bottom of the page.

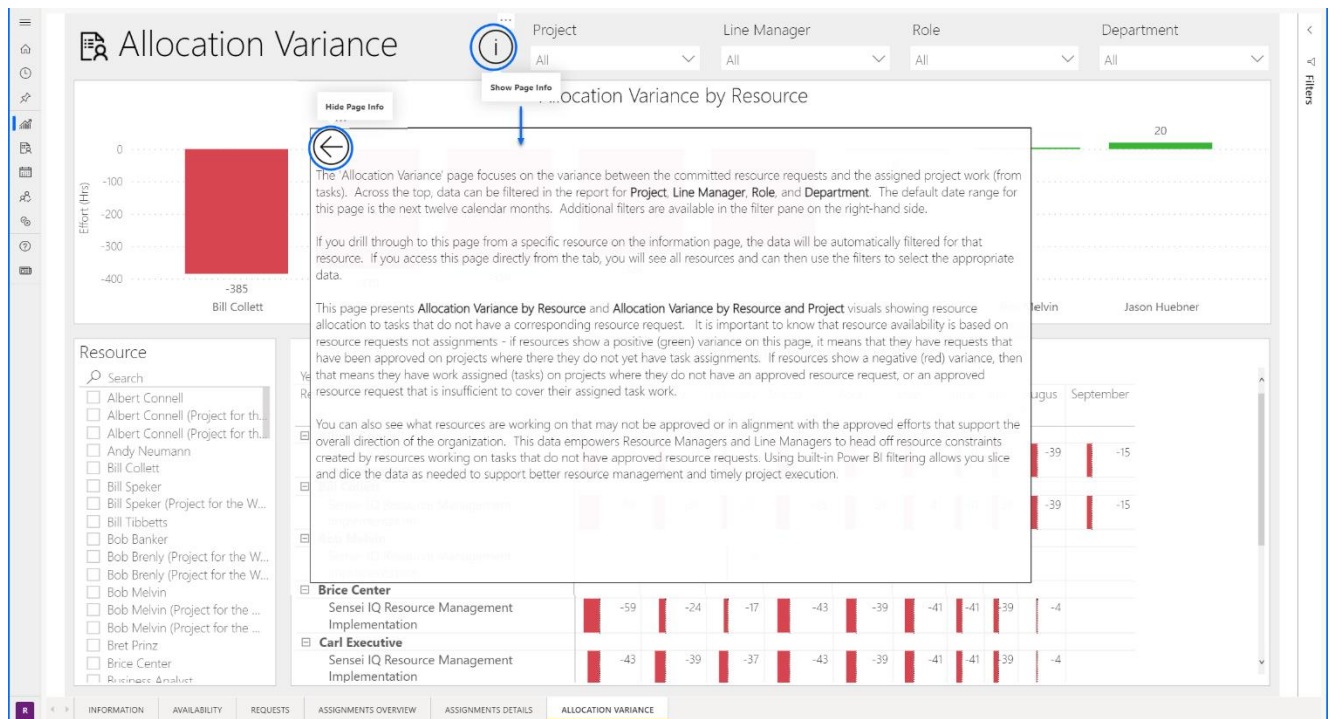
Tip: If you drill through to this report page from a specific resource on the **Information** page, the data will be automatically filtered for that resource only. If you access this page directly from the tab, you will see all resources and can then use the available filters to select the appropriate data by following these steps:

- 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.

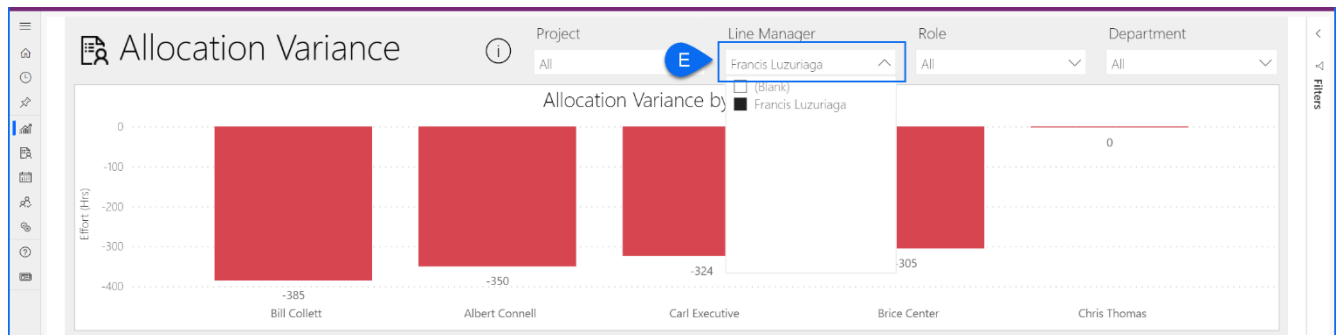


Important: The default date range for this page is the next twelve (12) calendar months.

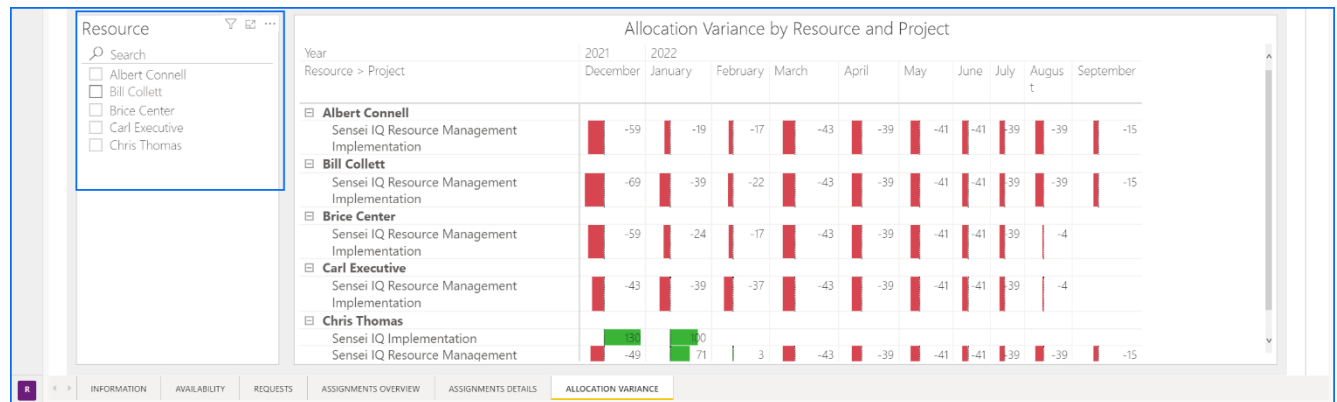
Tip: Clicking the **Show Page Info** button on each report page allows the user to view a description of the report page (**recommended**).



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

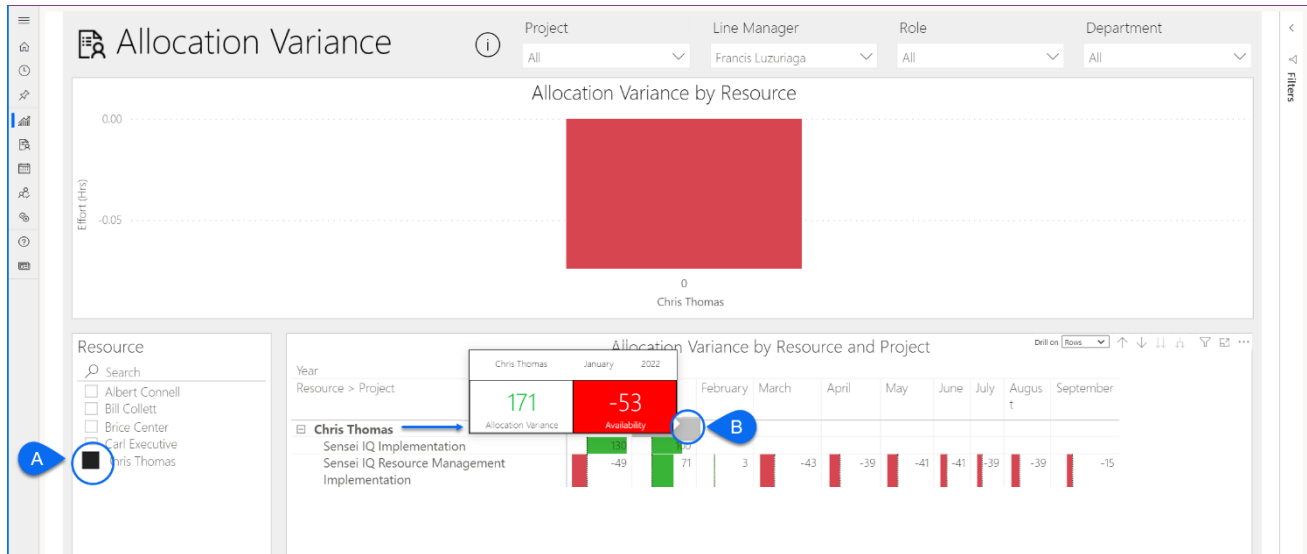


Tip: Across the top of the page, data can also be filtered in the report by **Project**, **Role** and/or **Department**. Additionally, you can use the **Resource** filter on the left-hand side of the screen to select named resource/s to focus on.



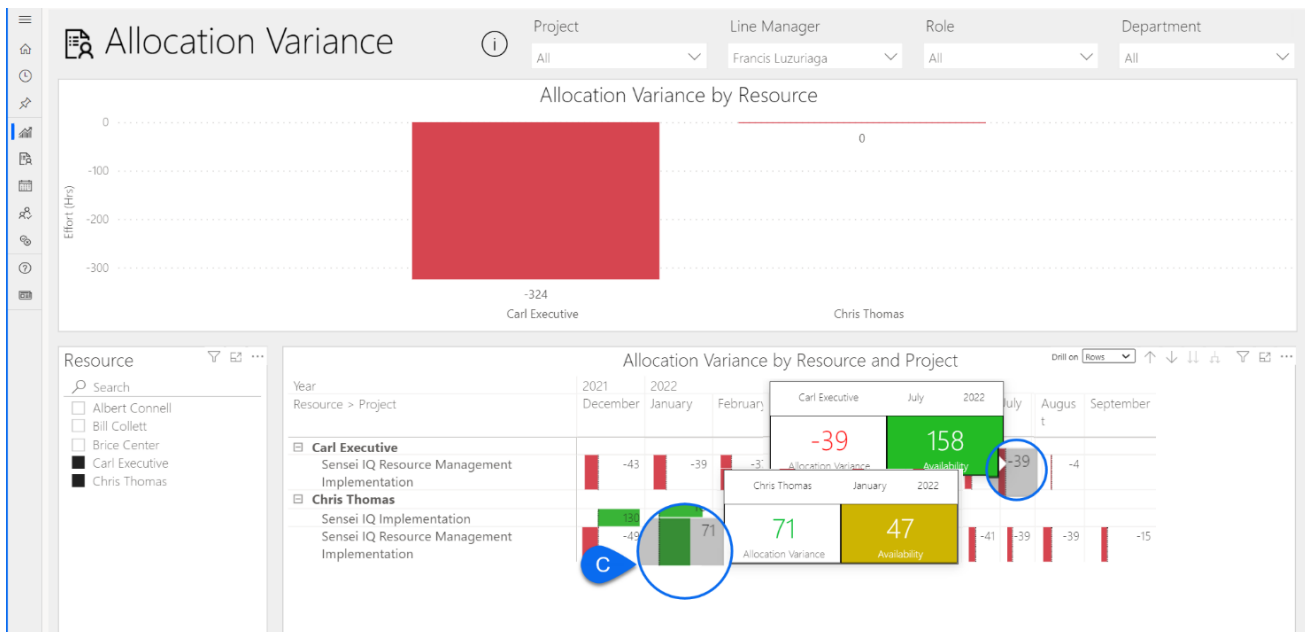
2. EVALUATE ALLOCATION VARIANCE OF NAMED RESOURCES

- Ensure that you have selected a named resource to evaluate the allocation variance of in the **Resource** filter.
- 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.

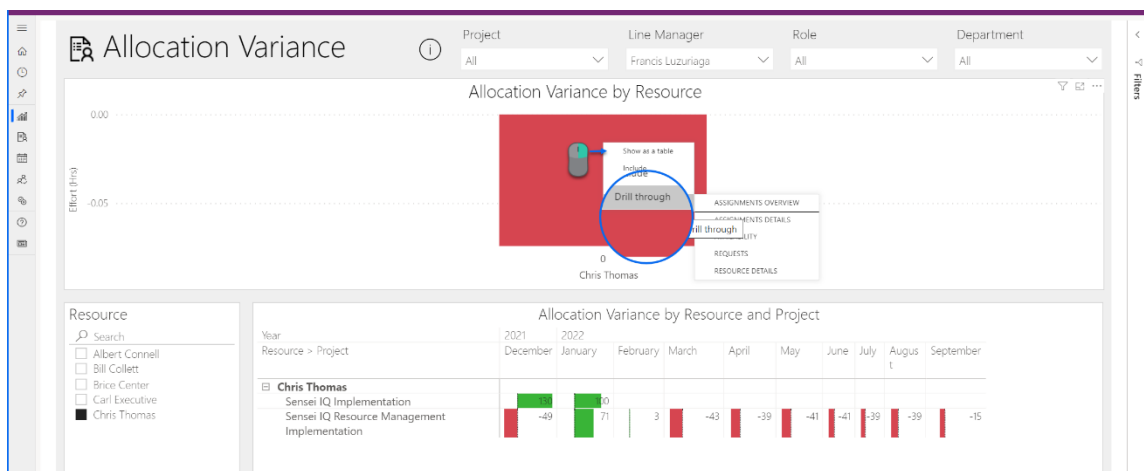
- c. Next, hover the mouse over the cells with **positive values** (highlighted in **green**) or **negative values** (highlighted in **red**) across the project name row under a named resource row for each visible period to display the **tooltip visual** that reveals the following insights:
- Name of 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*)

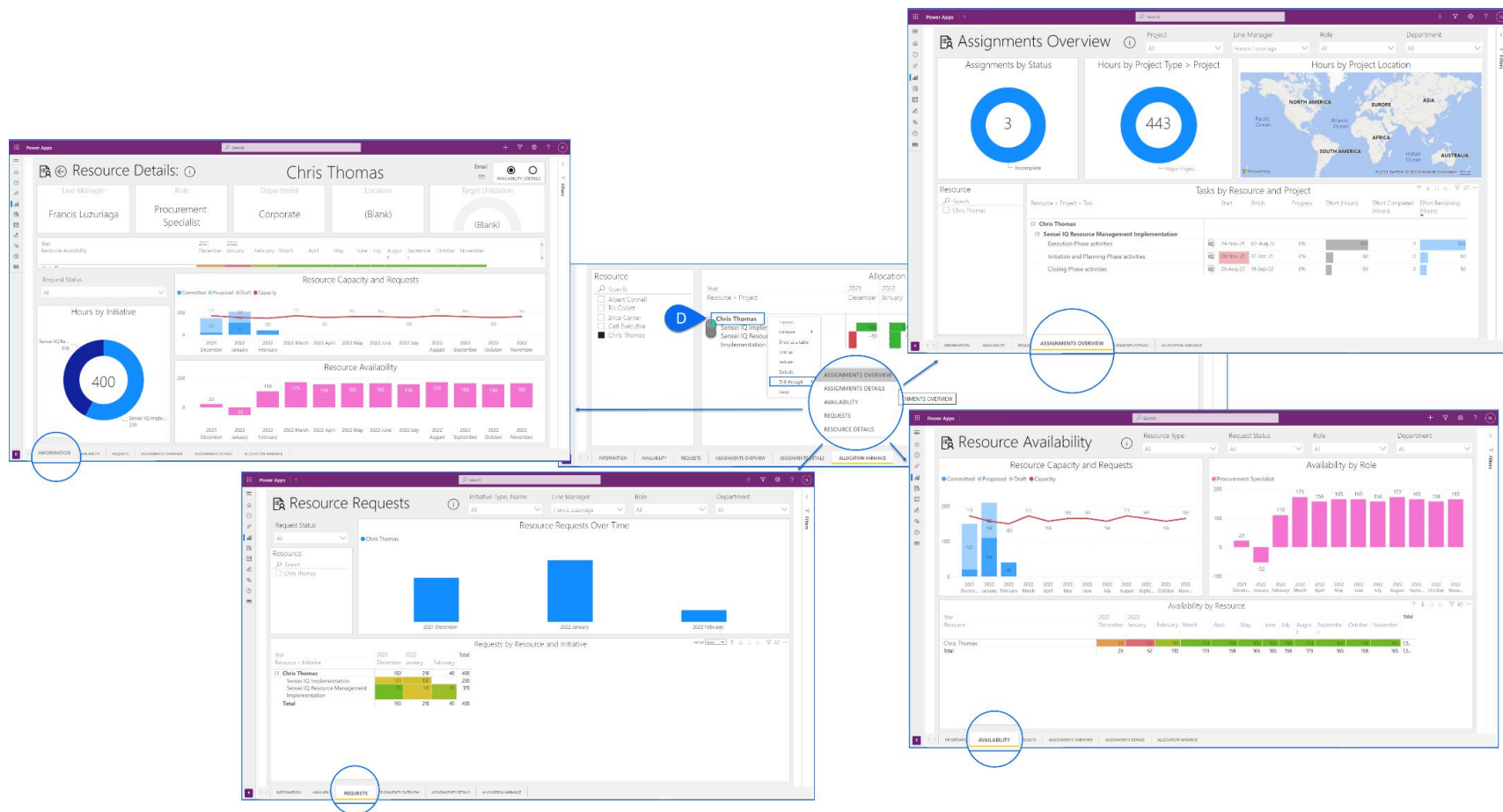


Tip: If the resource allocation shows a **positive green** variance against the project for the highlighted period, it means that they have resource requests that have been approved on the project's resource plan where they do not yet have task work assigned to them (*work assignments*) in the project 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 organisational 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 optimised, 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 organisation. 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.