Overview

This Job Aid defines the steps to follow for Managing Resource Capacity and Demand.   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 utilisation in the organisation to optimise 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 organisation'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).
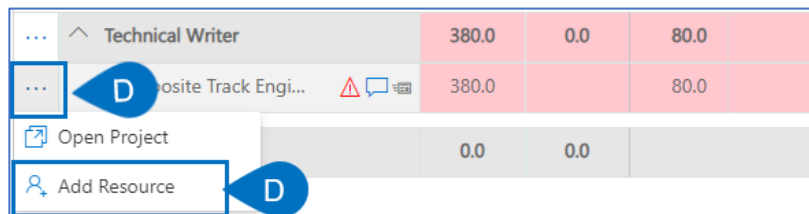
Note - This date range not only sets the visible time periods on the screen, it is also used by the resource availability heat map for each named resource to help you quickly validate that resource's availability and constrains dates used by the Autofill and Resource allocation functionality.

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.
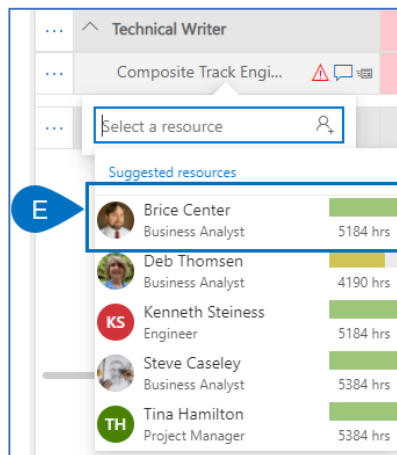

d. Click the **ellipsis** to the left of the project request and select **Add Resource**.

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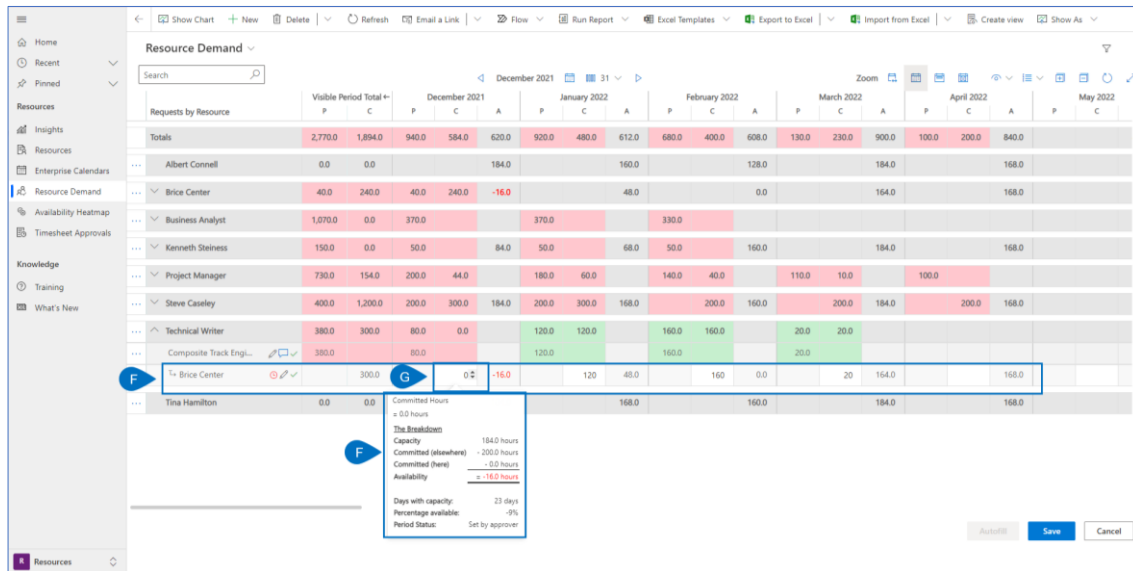
h. Click **Save** once all Resource Requests have been committed.

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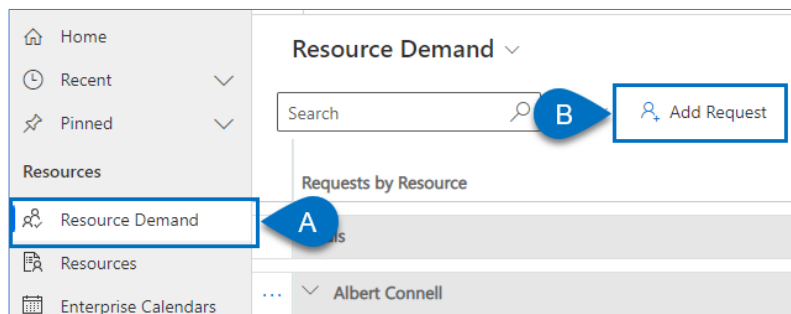
c. Define the **project** the new resource requests are to **be added to**.
d. Define the **resources** who will be **added to the project**.

e. Define the **number of hours** the resource will be **committed to the project**.

Identify and Resolve Resource Overallocations

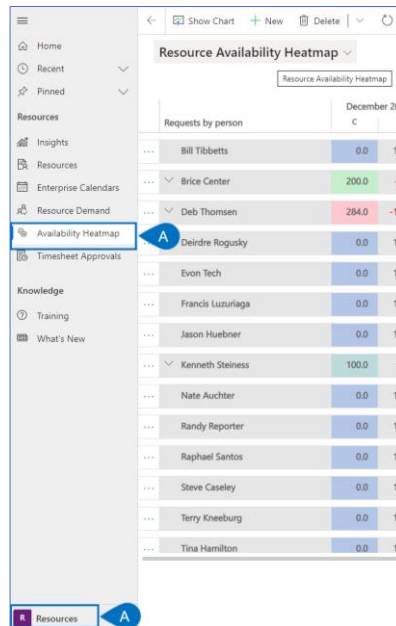👤 Resource Manager   🔧 Resources

1. IDENTIFY AND RESOLVE RESOURCE OVERALLOCATIONS

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

Tip - First, it's important to understand the colour 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 underutilised side of things the colour ranges from dark blue for not used at all to a lighter green for near full utilisation.

b. Use the buttons on the **sub-grid tool bar** to define **the start date, number of periods** and **view zoom level** (typically monthly).
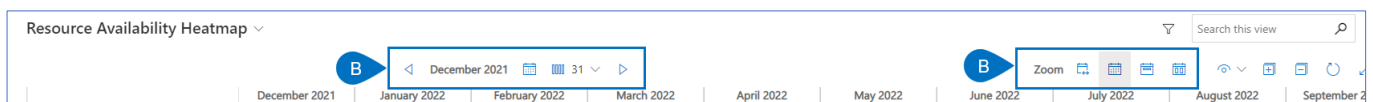
c. Review any red or **overallocated resources** by **hovering** over the red cells and **reviewing the calculations** to better understand the cause of the overallocation.

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.

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.