Resource Allocation Workbench Overview

Quick Reference Guide

Resource Allocation Workbench

Use the allocation workbench to allocate your teams' resources effectively to the requesting investments by evaluating resource capacity and availability.

The Allocation Workbench gives Resource Managers a comprehensive view of Resource Plans, allocations, utilization. and availability for Groups, Resources, and Roles.

From here, Resource Managers Confirm and/or Allocate resources to Projects and Demands. The typical allocation process is as follows:

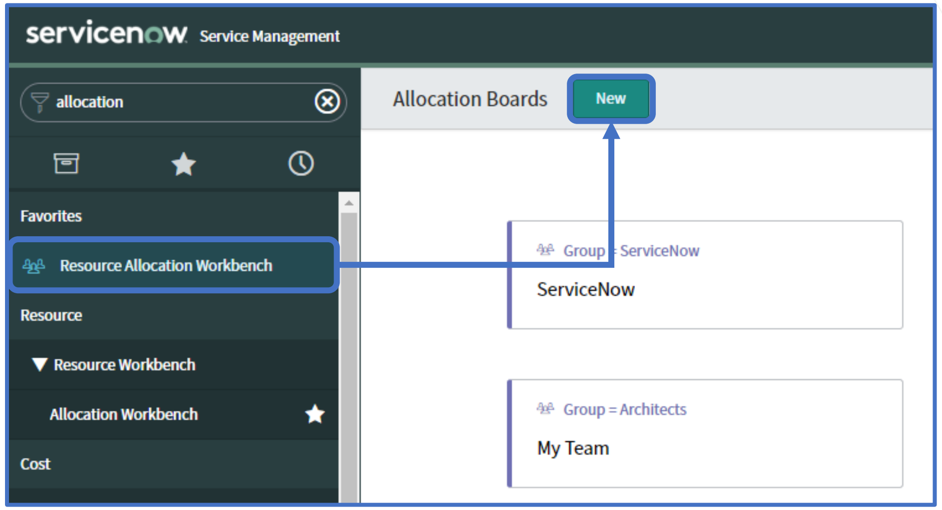
1. Create and configure an Allocation Board
2. Find named resources to fit the request
3. Confirm and/or Allocate Resource Plans
4. Contour allocations

Resource Allocation Workbench

Create and Configure and Allocation Board:

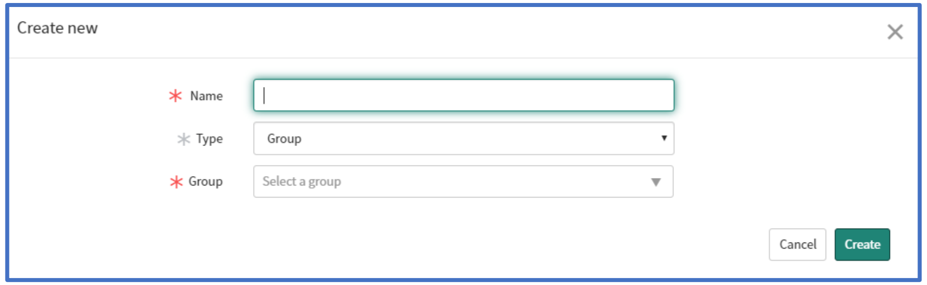
Allocation Boards are “reports” that filter for specific resource plans that you want to review or manage.

To create a new board, click **New**.



Next, set the filter criteria for your board:

- **Name** – provide a title for your Allocation Board
- **Type** – specify how you want to select which resource plans to review and manage. Options are: Demands/Projects, Group, Group Manager, Portfolio, Program, Resource Plan, Role, User Manager
- **Group/Group Manager/ Portfolio/ Program/ Role/ User Manager** – single select field to specify selection criteria for the Resource Plans to be managed
- **Demand/ Project** and **Resource Plan** – query builder that allows you to create multiple selection criteria



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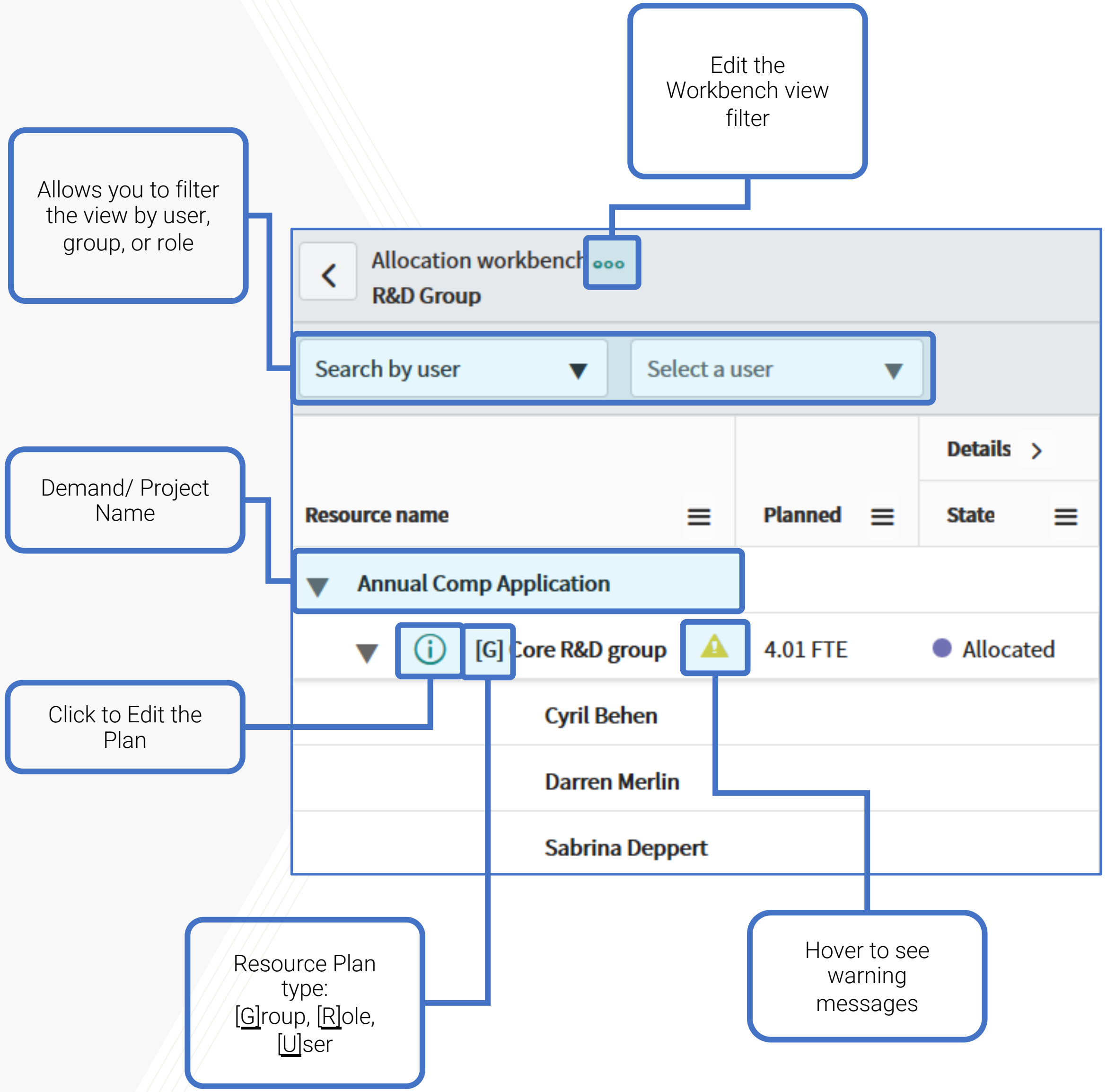

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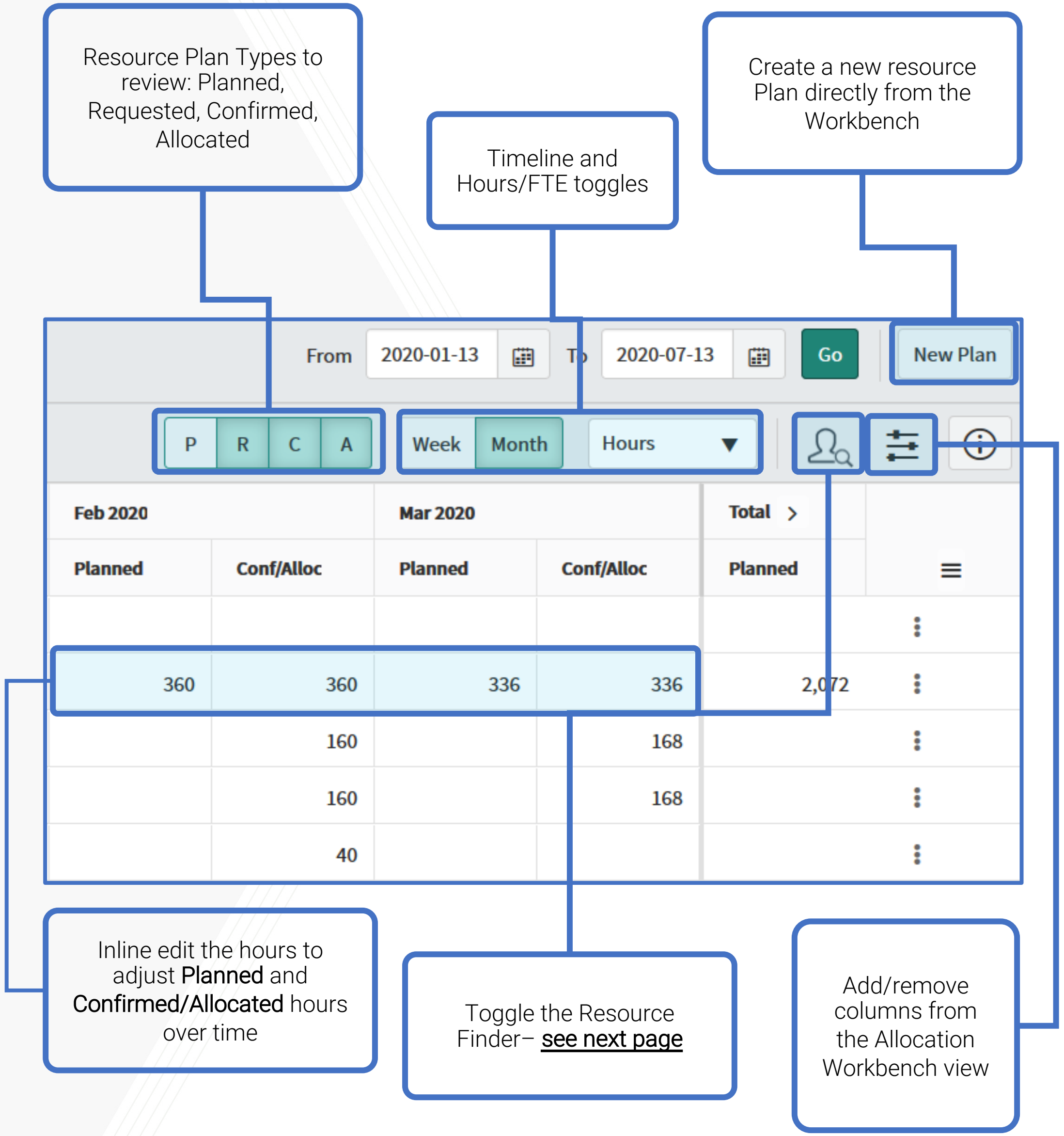

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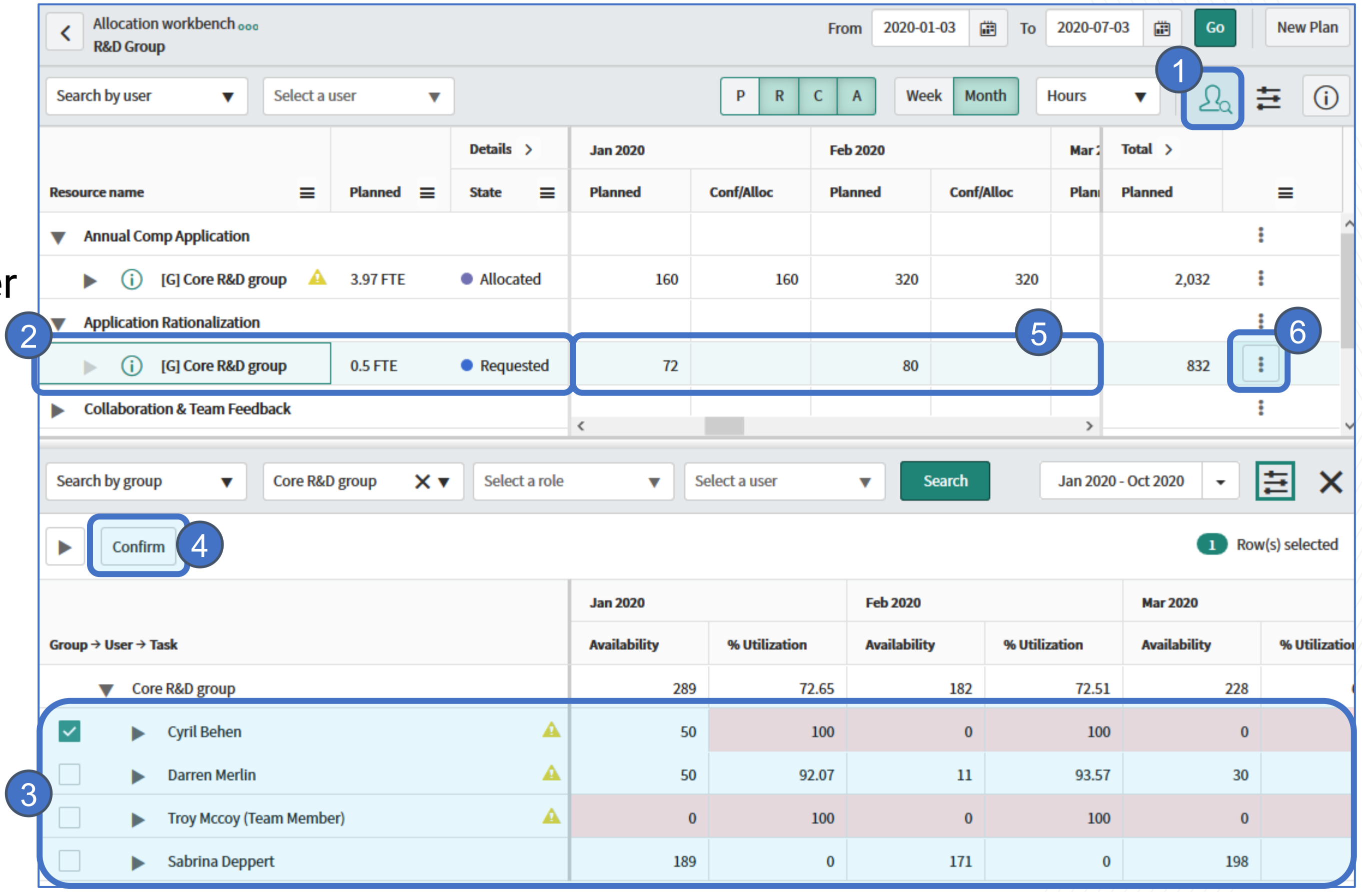
Resource Finder Overview:

1. Open the Resource Finder.
2. Choose a Resource Plan.
3. View availability and utilization of each team member to see who is available and when.
4. Confirm and/or allocate the resource(s) to the resource plan.
5. Contour Conf/Alloc hours via inline editing, depending on how much you want to allocate your team by week or month.
6. Use the Actions menu to Allocate all the selected resources to the Resource Plan, or allocate each resource individually.



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