

The logo features the Georgia Institute of Technology 'GT' monogram in the top left corner. The main text 'Georgia Tech' is in a bold, white, sans-serif font. To the right of the text is a white outline of the Georgia Tech tower. Below the tower is a series of white diagonal lines.

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CREATING THE NEXT

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

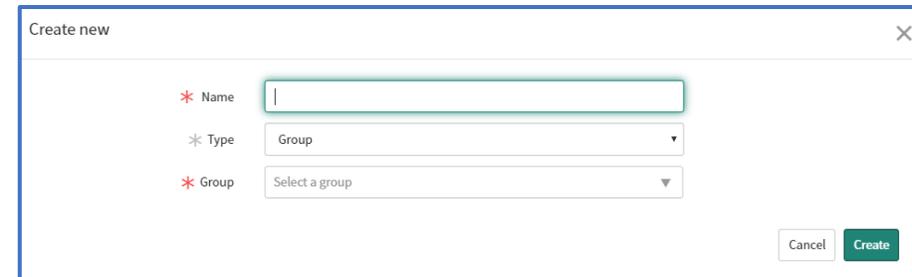
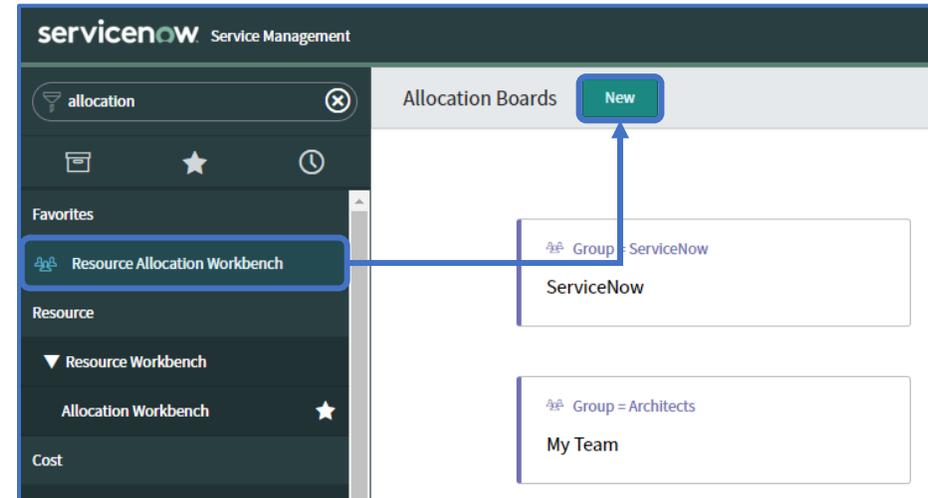
Create and Configure and Allocation Board:

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

The 'Create new' dialog box is shown with three required fields marked with a red asterisk: 'Name' (an empty text input field), 'Type' (a dropdown menu currently showing 'Group'), and 'Group' (a dropdown menu currently showing 'Select a group'). At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Create'.

Resource Allocation Workbench

Allows you to filter the view by user, group, or role

Edit the Workbench view filter

Demand/ Project Name

Click to Edit the Plan

Resource Plan type: [G]roup, [R]ole, [U]ser

Hover to see warning messages

Allocation workbench R&D Group

Search by user Select a user

Details >

Resource name	Planned	State
Annual Comp Application		
[G] Core R&D group	4.01 FTE	Allocated
Cyril Behen		
Darren Merlin		
Sabrina Deppert		

Resource Allocation Workbench

Resource Plan Types to review: Planned, Requested, Confirmed, Allocated

Timeline and Hours/FTE toggles

Create a new resource Plan directly from the Workbench

From 2020-01-13 To 2020-07-13 Go New Plan

P R C A Week Month Hours

Feb 2020		Mar 2020		Total >	
Planned	Conf/Alloc	Planned	Conf/Alloc	Planned	☰
360	360	336	336	2,072	⋮
	160		168		⋮
	160		168		⋮
	40				⋮

Inline edit the hours to adjust **Planned** and **Confirmed/Allocated** hours over time

Toggle the Resource Finder – [see next page](#)

Add/remove columns from the Allocation Workbench view

Resource Allocation Workbench

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.

The screenshot displays the 'Allocation workbench' interface for an 'R&D Group'. It features a top navigation bar with date filters (From: 2020-01-03, To: 2020-07-03) and a 'Go' button. Below this is a search bar and a 'Search by user' dropdown. The main area is a table with columns for 'Resource name', 'Planned', 'State', and monthly columns for 'Jan 2020', 'Feb 2020', and 'Mar 2020', each with sub-columns for 'Planned' and 'Conf/Alloc'. A 'Total' column is also present. The table lists resources like '[G] Core R&D group' with their FTE and allocation status. A 'Confirm' button is visible below the table. At the bottom, a detailed view shows 'Group -> User -> Task' with columns for 'Availability' and '% Utilization' for each month.

Resource name	Planned	State	Jan 2020		Feb 2020		Mar 2020		Total
			Planned	Conf/Alloc	Planned	Conf/Alloc	Planned	Planned	
[G] Core R&D group	3.97 FTE	Allocated	160	160	320	320			2,032
[G] Core R&D group	0.5 FTE	Requested	72		80				832

Group -> User -> Task	Jan 2020		Feb 2020		Mar 2020	
	Availability	% Utilization	Availability	% Utilization	Availability	% Utilization
Core R&D group	289	72.65	182	72.51	228	
✓ Cyril Behen	50	100	0	100	0	
☐ Darren Merlin	50	92.07	11	93.57	30	
☐ Troy Mccoy (Team Member)	0	100	0	100	0	
☐ Sabrina Deppert	189	0	171	0	198	