



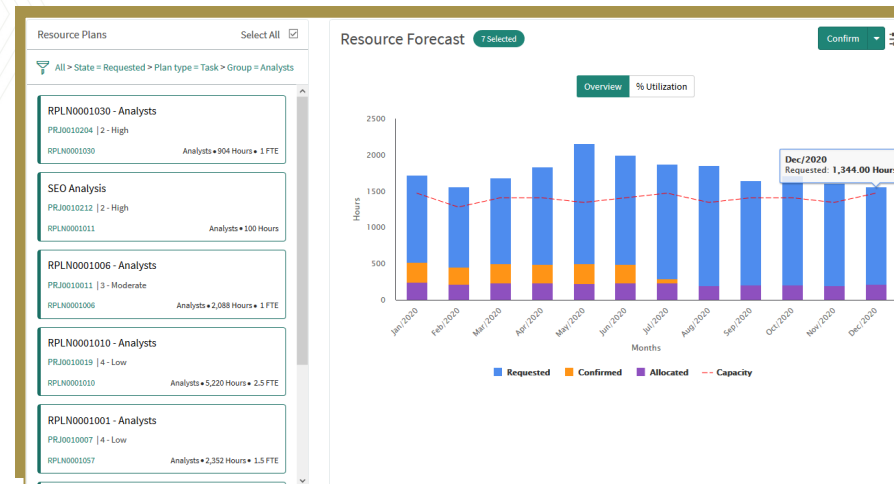
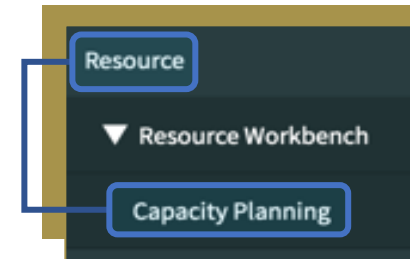
Capacity Planning Workbench Overview

Quick Reference Guide

Capacity Planning Workbench

The **Capacity Planning** Workbench provides resource managers with a comprehensive view of capacity, allocations, and utilization of resources. It is a good tool to perform **what-if analysis** based on the resource plans being requested of your team. To perform detailed resource booking, utilize the **Allocation Workbench**.

Access the Capacity Planning Workbench by selecting **Resource** > **Capacity Planning**.



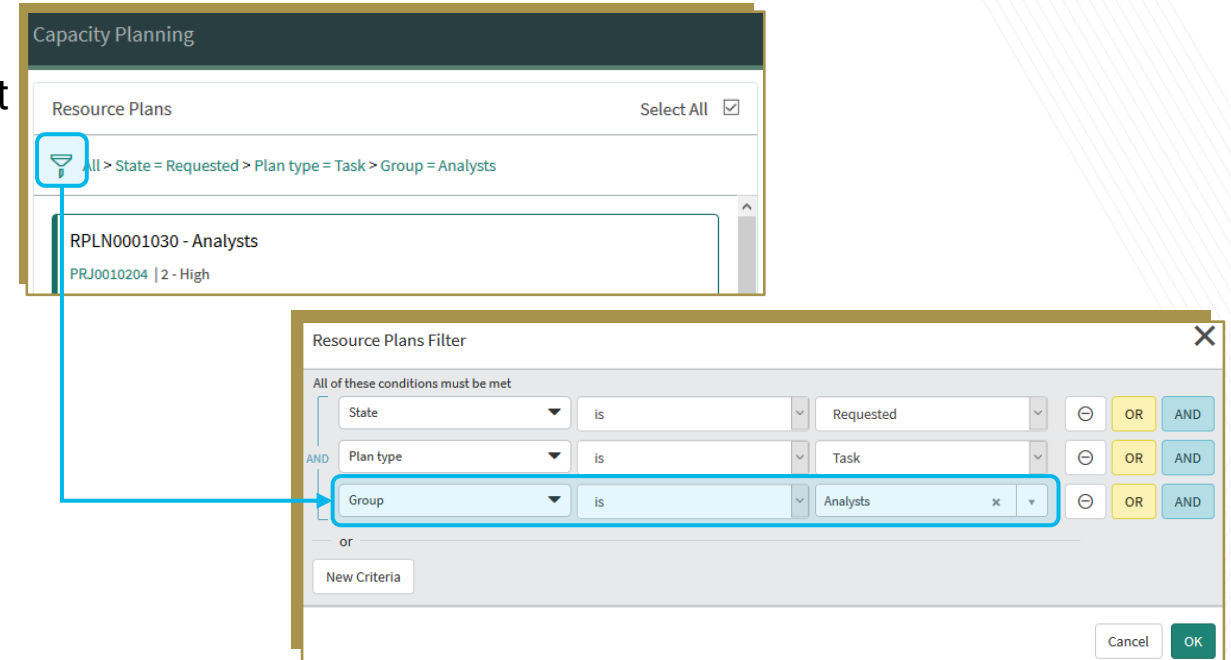
Selecting Resource Plan cards on left allows you to “turn on” and “turn off” plans that are represented in the right side graph.

Requested, Confirmed, Allocated and Capacity hours are displayed for selected resource plans on the left side.

Capacity Planning Workbench

The **left side** of the Capacity Planning Workbench allows you to toggle resource plans “on” and “off” to see the impact to your team over time if you would confirm and/or allocate that resource plan and add it to your team’s workload. Note the Capacity Planning only shows **Requested** resource plans.

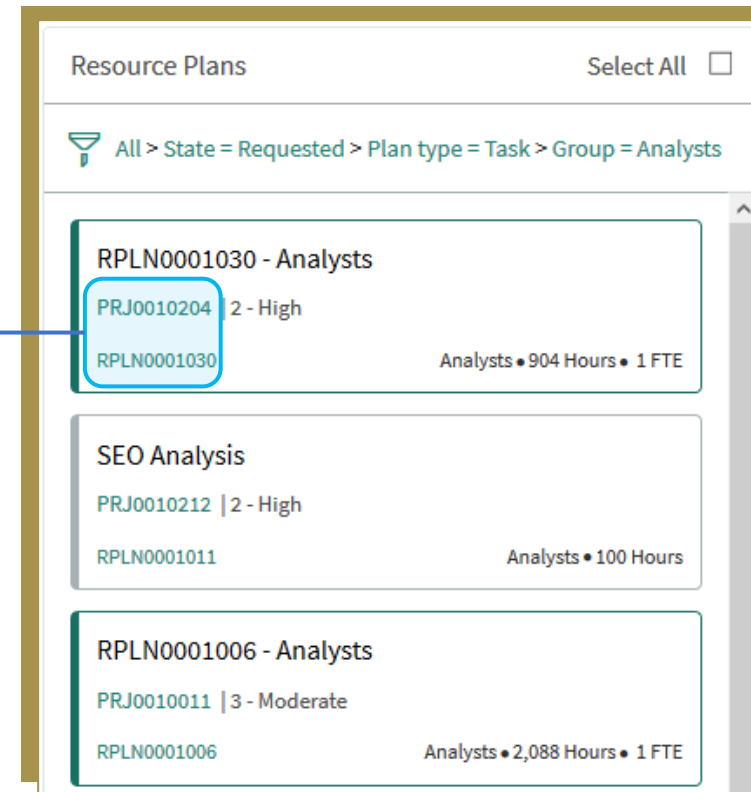
- The two main actions on the left side are:
 1. Filter the list of resource plans to your needs (e.g. filter the list by the resource group that you manage). By default, the Capacity Planning workbench shows all Requested resource plans in the system.



Capacity Planning Workbench

2. Toggle resource plans “on” and “off” by clicking them, which in turn changes the Overview and % Utilization charts on the right. If a resource plan is “turned off”, it is not considered in the graphs on the right.

- **Dark green** = on
- **Grey** = off



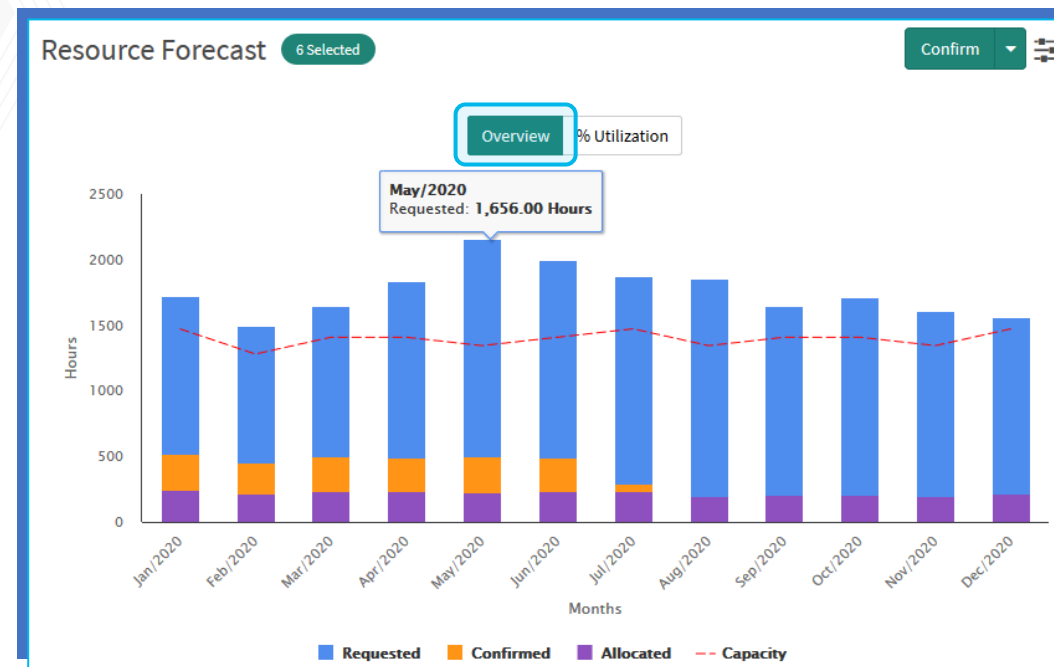
By clicking on the **resource plan ID** (RPLN...), you can open the resource plan and directly edit the record. You can also click on the **project ID** (PRJ...) to view the details of the project itself.

Capacity Planning Workbench

The right side of the Capacity Planning Workbench contains two charts where you can see the impact of all confirmed and allocated resource plans against the requests from the left side of the workbench. Note that if you click Confirm, you will add all available resources on your team to the resource plan. Therefore, best practice is **not** to Confirm here, but rather confirm specific resources against resource plans using the Allocation Workbench.

Overview chart

This view shows all Confirmed and Allocated resource plans over time as well as the selected Requested resource plans from the left side. The graph is interactive, so you can hover over any of the bars to see a summary (e.g. the May/2020 example below), you can click any of the bars to see the details of where the data is coming from, and you can click each state in the legend to turn the states on/off in the graph.



Capacity Planning Workbench

% Utilization chart

This view is a heatmap that shows the utilization of the entire team over time. This includes all confirmed, allocated, and selected Requested resource plans from the left side. The graph is interactive, so you can hover over any of the bars to see a summary (e.g. the Oct/2020 example below), you can click any of the bars to see the details of where the data is coming from.

