Resource Allocation Report

Common Business Questions:

- What is my billable utilization of resources?
- Are my resources reaching billable goals?
- Are resources under or over utilized?
- Who is available/not available and when?
- What is the forecasted availability of my team?

People Resource Allocation Report

Navigate to **People Reports > Periodic Reports** and select the **Resource Allocation report** or **Resource Allocation Bar Chart report** as desired.

The **People Resource Allocation report** shows the allocation of employees across projects in the standard grid format. The **People Resource Allocation Chart report** displays by person (x-axis) and by month (y-axis).

Note that this report may also be run to show billable utilization. The individual cell colors represent the level of loading for that individual and can be set as appropriate for the team or organization included in the report. The matrix output is a periodic format with the cell colors which visually flag those resources that fall in a particular booked percentage range. For example:

- Yellow - 50% or less loaded
- Green - 51% to 100% loaded
- Red - over 100% loaded

This report can be configured to answer a variety of questions regarding how booked a person is, in terms of actual, assigned or planned hours. Leave can also be considered as booked if required. The PERSON name can be clicked (blue text) enabling the user to drill down and view additional details of what projects are planned, assigned, or have charged actual hours for this resource. This report is available with the Unanet Project Portfolio License Type.

Resource Allocation Report

Navigate to **Resource Reports > Periodic Reports** and select the **Resource Allocation report** or **Resource Allocation Bar Chart report** as desired.

The **Resource Allocation report** shows the allocation of employees across projects in the standard grid format. The **Resource Allocation Chart report** displays by person (x-axis) and by month (y-axis).

Note that this report may also be run to show billable utilization. The individual cell colors represent the level of loading for that individual and can be set as appropriate for the team or organization included in the report. The matrix output is a periodic format with the cell colors which visually flag those resources that fall in a particular booked percentage range. For example:

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This report can be configured to answer a variety of questions regarding how booked a person is, in terms of actual, assigned or planned hours. Leave can also be considered as booked if required.

**Note:** This report does not allow clicking the PERSON name to drill down and view additional details.

This report is available with the Unanet Project Portfolio License Type.

### Resource Allocation

**Booked % Color:**
- <= 50%
- 51% - 100%
- >= 101%

**Date Range:** 1/1/2019 - 12/31/2019
**Including Plans Only**
**Showing Booked Percent**

**Person Organization:** CS-TECH-SERV

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<tr>
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<td>57%</td>
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**Totals for CS-TECH-SERV:**
- 71%
- 89%
- 99%
- 76%
- 93%
- 90%
- 65%
- 71%
- 65%
- 69%
- 69%
- 71%
- 77%

### Additional Information

- Help Docs - People Resource Allocation Report