

RESOURCE CAPACITY PLANNER v2

PURPOSE

Understand the available resource capacity, compare with demand and identify surplus/deficit capacity.

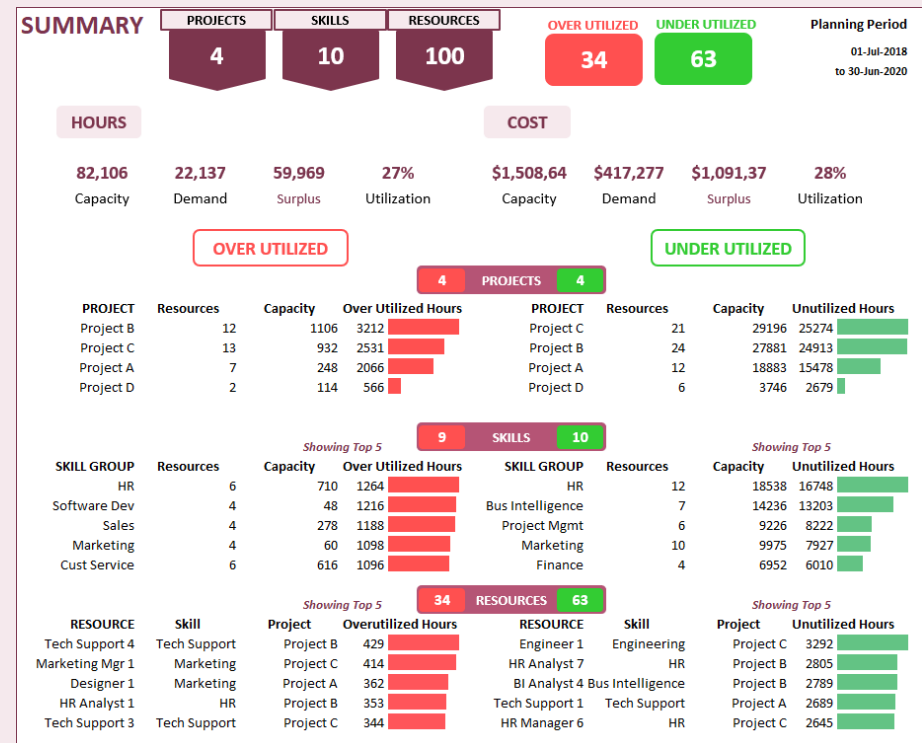
- Simple and easy to use
- Plan by 3 levels (Resource, Skill & Project)
- Automated Dashboard and Calendar
- Practical functionality
- All within Excel (No Macros)

REQUIREMENTS

- Microsoft Excel for Windows (2010 or Later)
- Microsoft Excel for Mac (2011 or Later)

MORE DETAILS

- Product Page: indzara.com/product/resource-capacity-planner-excel-template/
- Site: indzara.com



CAPACITY PLANNING FRAMEWORK

ENTER INPUT

EVALUATE PLAN

Settings

- Planning Period
- Weekends
- Holidays
- Projects
- Skills

Capacity

- Std Resource Availability
- Vacation
- Overtime
- Assign Resource to Skill & Project

Demand

- Tasks (Hours)
- Assign to Resource



Dashboard

- View overall metrics
- Underutilized Resources
- Overutilized Resources
- Filter to Project(s) and/or Skill Group(s)

Calendar

- By Resource / Skill / Project
- By Capacity / Demand / Surplus-Deficit
- By Hours / Cost
- By Day / Week / Month / Quarter / Year



SETTINGS

INPUT SETTINGS

1. PLANNING PERIOD

START DATE
END DATE

Max. 2 years. End Date will be set as 31-Dec-2019

2. WEEKENDS

capacity will be zero during weekends by default

3. HOLIDAYS

-
-
-
-
-
-
-
-
-

4. PROJECTS

Enter up to 100 Projects

-
-
-
-
-

5. SKILL GROUPS

Enter up to 100 groups

-
-
-
-
-
-
-
-
-
-
-

RESOURCE CAPACITY INPUTS

STANDARD AVAILABILITY

RESOURCES												
RESOURCE NAME	START DATE	SUN	MON	TUE	WED	THU	FRI	SAT	SKILL GROUP	PROJECT	END DATE	COST PER HOUR
Cust Svc Rep 1	31-Jul-2018		4	4	4	4	4		Cust Service	Project B	27-Sep-2018	12
Cust Svc Rep 2	05-Nov-2018		4	4	4	4	4		Cust Service	Project D	01-Dec-2018	21
Cust Svc Rep 3	08-Sep-2018		4	4	4	4	4		Cust Service	Project A	13-Nov-2018	13
Cust Svc Rep 4	25-Nov-2018		4	4	4	4	4		Cust Service	Project C	21-Oct-2018	20
Cust Svc Rep 5	19-Jul-2018		4	4	4	4	4		Cust Service	Project B	26-Sep-2018	16
Cust Svc Rep 6	02-Sep-2018		4	4	4	4	4		Cust Service	Project B	28-Dec-2018	24
Cust Svc Rep 7	07-Oct-2018		4	4	4	4	4		Cust Service	Project B	17-Dec-2018	24
Cust Svc Rep 8	28-Nov-2018		4	4	4	4	4		Cust Service	Project C		10
Cust Svc Rep 9	27-Nov-2018		4	4	4	4	4		Cust Service	Project A	06-Aug-2018	20
Designer 1	12-Dec-2018		6	6	6	6	6		Marketing	Project A	15-Dec-2018	18
Designer 2	20-Nov-2018		6	6	6	6	6		Marketing	Project A		15
Designer 3	16-Sep-2018		6	6	6	6	6		Marketing	Project A	08-Dec-2018	12
Engineer 1	29-Sep-2018		8	8	8	8	8		Engineering	Project C		19
Engineer 2	30-Oct-2018		8	8	8	8	8		Engineering	Project C	24-Dec-2018	15
Engineer 3	19-Sep-2018		8	8	8	8	8		Engineering	Project B	18-Dec-2018	12
Engineer 4	14-Aug-2018		8	8	8	8	8		Engineering	Project D	29-Dec-2018	23
Engineer 5	08-Aug-2018		8	8	8	8	8		Engineering	Project B	16-Oct-2018	20
Engineer 6	13-Sep-2018		6	6	6	6	6		Engineering	Project A	28-Nov-2018	24
Engineer 7	21-Aug-2018		8	8	8	8	8		Engineering	Project C	18-Aug-2018	25

VACATION / OVERTIME

VACATION / OVERTIME			
RESOURCE NAME	START DATE	END DATE	HOURS
Cust Svc Rep 1	20-Jan-2018	23-Jan-2018	1
Cust Svc Rep 2	11-Feb-2018	15-Feb-2018	-3
Cust Svc Rep 3	24-Feb-2018	26-Feb-2018	-7
Cust Svc Rep 4	12-Feb-2018	14-Feb-2018	-5
Cust Svc Rep 5	06-Feb-2018	10-Feb-2018	8
Cust Svc Rep 6	03-Aug-2018	03-Aug-2018	-8
Cust Svc Rep 7	30-Jan-2019	01-Feb-2019	2
Cust Svc Rep 8	01-Dec-2018	04-Dec-2018	4
Cust Svc Rep 9	19-Feb-2019	22-Feb-2019	-7
Designer 1	07-Feb-2018	10-Feb-2018	-6
Designer 2	21-Feb-2018	25-Feb-2018	-6
Designer 3	22-Feb-2018	24-Feb-2018	1
Engineer 1	04-Dec-2018	06-Dec-2018	-8
Engineer 2	21-Jan-2018	23-Jan-2018	-2
Engineer 3	06-Nov-2018	08-Nov-2018	-7

DEMAND INPUT

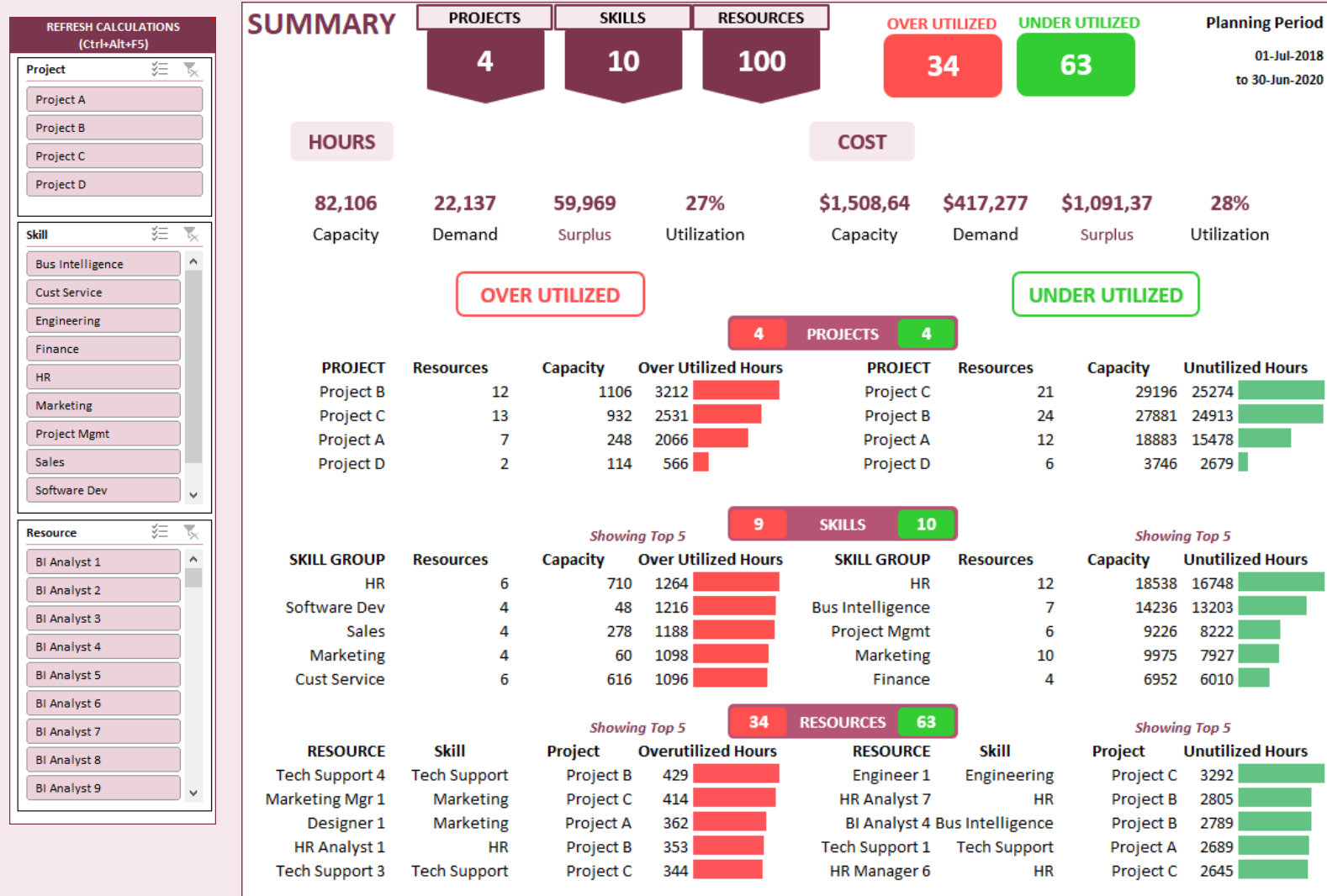
Enter demand as tasks with Hours of work for a specific date.

Assign to a resource.

ENTER DEMAND (TASKS)			
<i>Date on which work has to be done</i>	<i>Resource name who has to do the work</i>	<i>Enter work hours (Optional)</i>	<i>Enter details of task</i>
DATE	RESOURCE	HOURS	DETAIL
7/5/2018	Cust Svc Rep 9	6	
7/7/2018	Cust Svc Rep 9	5	
7/9/2018	Sales Mgr 1	8	
7/10/2018	Mktg Analyst 2	8	
7/10/2018	Mktg Analyst 2	7	
7/10/2018	Cust Svc Rep 9	5	
7/11/2018	Cust Svc Rep 9	6	
7/11/2018	Cust Svc Rep 9	7	
7/11/2018	Mktg Analyst 2	8	
7/11/2018	Mktg Analyst 2	7	
7/11/2018	Sales Mgr 1	5	
7/11/2018	Cust Svc Rep 9	6	
7/12/2018	Cust Svc Rep 9	5	
7/13/2018	Mktg Analyst 2	6	
7/13/2018	Mktg Analyst 2	6	
7/13/2018	Cust Svc Rep 9	6	

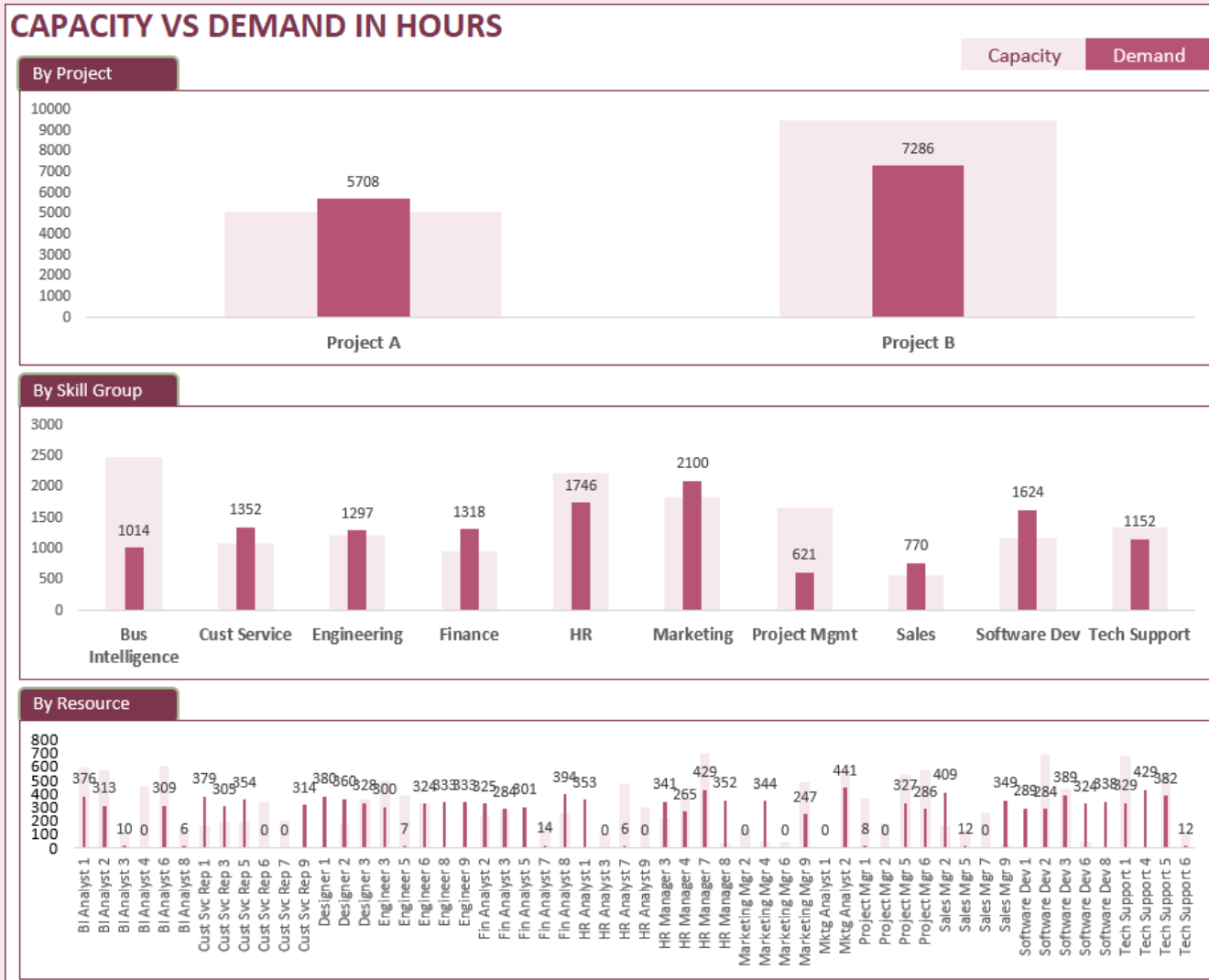
DASHBOARD

Dashboard with filters/slicers



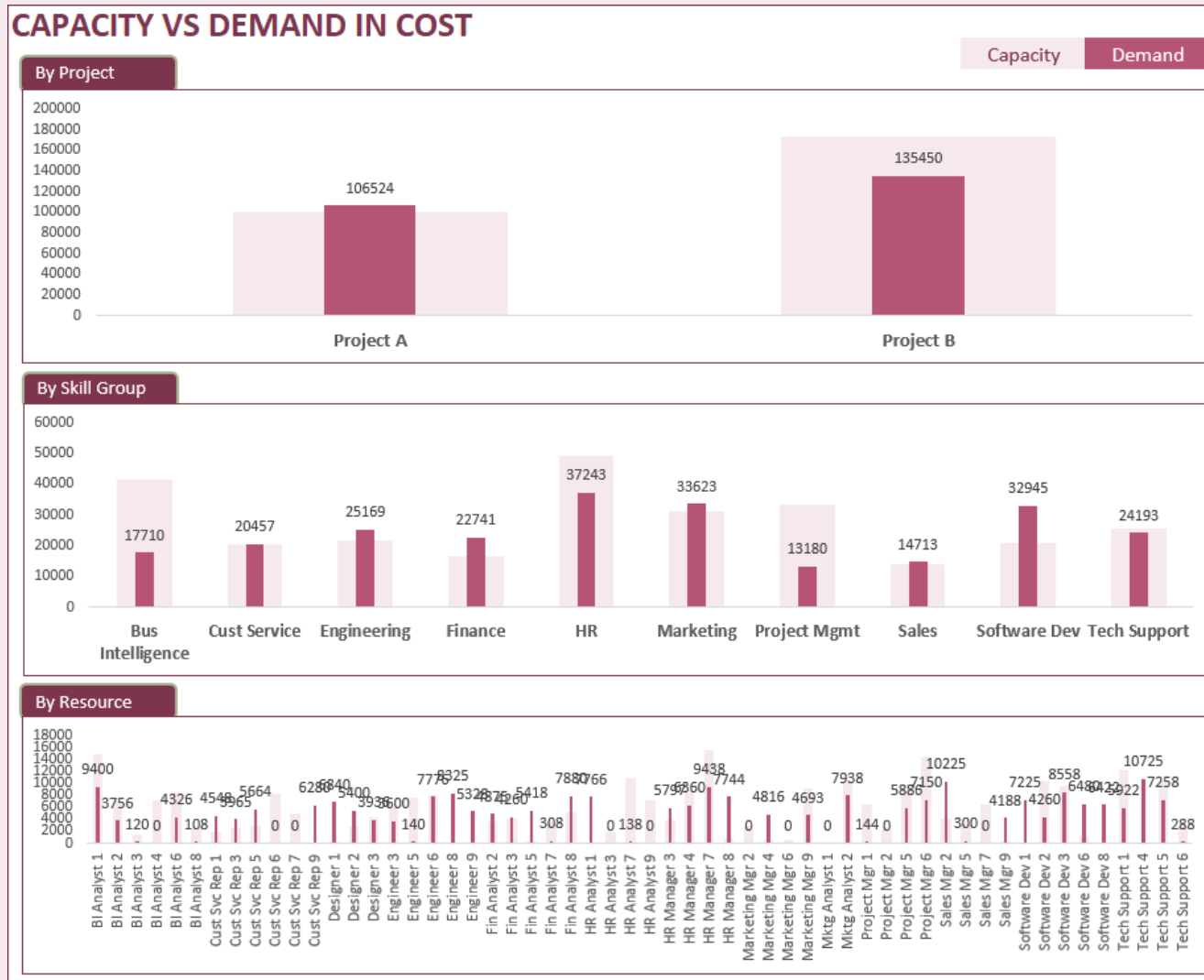
DASHBOARD

CAPACITY VS DEMAND (HOURS)



DASHBOARD

CAPACITY VS DEMAND (COST)



CALENDAR

Flexible calendar with options and filters

CALENDAR		Settings											
Dimension	RESOURCE	Planning Period											
Measure	CAPACITY	01-Aug-2018											
Unit	HOURS	to 31-Dec-2018											
Time Dimension	WEEKLY												
RESOURCE		TOTAL HOURS	TOTAL COST	1-Aug	8-Aug	15-Aug	22-Aug	29-Aug	5-Sep	12-Sep	19-Sep	26-Sep	
Project	Cust Svc Rep 1	156	\$1,872	16	20	12	20	20	20	20	20	8	
Project A	Cust Svc Rep 2	80	\$1,680	0	0	0	0	0	0	0	0	0	
Project B	Cust Svc Rep 3	188	\$2,444	0	0	0	0	0	8	20	20	20	
Project C	Cust Svc Rep 4	0	\$0	0	0	0	0	0	0	0	0	0	
Project D	Cust Svc Rep 5	152	\$2,432	16	20	12	20	20	20	20	20	4	
	Cust Svc Rep 6	340	\$8,160	0	0	0	0	8	20	20	20	20	
	Cust Svc Rep 7	204	\$4,896	0	0	0	0	0	0	0	0	0	
	Cust Svc Rep 8	112	\$1,120	0	0	0	0	0	0	0	0	0	
	Cust Svc Rep 9	0	\$0	0	0	0	0	0	0	0	0	0	
	Designer 1	18	\$324	0	0	0	0	0	0	0	0	0	
	Designer 2	180	\$2,700	0	0	0	0	0	0	0	0	0	
	Designer 3	360	\$4,320	0	0	0	0	0	0	12	30	30	

CALENDAR SETTINGS

Dimension

CALENDAR

Settings

Dimension: RESOURCE

Measure: RESOURCE

Unit: SKILL GROUP

Unit: PROJECT

Measure

CALENDAR

Settings

Dimension: RESOURCE

Measure: CAPACITY

Unit: CAPACITY

Unit: DEMAND

Unit: SURPLUS/DEFICIT

4 Selections

CALENDAR

Settings

Dimension: RESOURCE

Measure: CAPACITY

Unit: HOURS

Time Dimension: WEEKLY

Time Dimension

CALENDAR

Settings

Dimension: RESOURCE

Measure: CAPACITY

Unit: HOURS

Time Dimension: DAILY

Time Dimension: WEEKLY

Time Dimension: MONTHLY

Time Dimension: QUARTERLY

Time Dimension: ANNUAL

Unit

CALENDAR

Settings

Dimension: RESOURCE

Measure: CAPACITY

Unit: HOURS

Unit: COST

HIGHLIGHTS

- ✓ Simple and easy
 - Simplified data entry
 - Simple Excel spreadsheet with no macros
- ✓ Automated relevant output
 - Interactive Dashboard
 - Customizable Calendar view
 - Cost calculation
 - Print or export as PDF and share
- ✓ Practical Functionality
 - Multiple aggregation periods (Daily, Weekly, Monthly, Quarterly and Annual)
 - Planning Units (Hours and Cost)
 - Supports company Holidays
 - Supports customizable Weekends
 - Resource can start and end any day
- ✓ Limitations
 - Maximum 2 years of planning period
 - Maximum 100 Resources, 100 Skill Groups and 100 Projects (can be extended)
 - No task scheduling feature (see [Project Planner](#) template)

MORE DETAILS

Product Page:

[indzara.com/product/resource-capacity-planner-excel-template/](https://www.indzara.com/product/resource-capacity-planner-excel-template/)

Site:

[indzara.com](https://www.indzara.com)

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