

RESOURCE CAPACITY PLANNER v2

PURPOSE

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

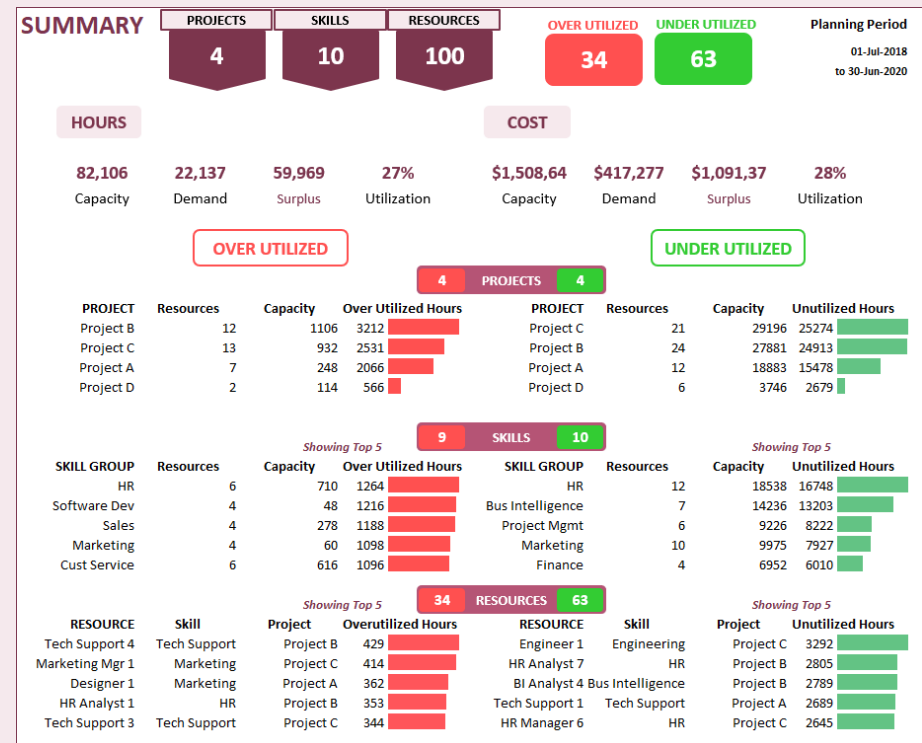
- Simple and easy to use
- Plan by 3 levels (Resource, Skill & Project)
- Automated Dashboard and Calendar
- Practical functionality
- All within Excel (No Macros)

REQUIREMENTS

- Microsoft Excel for Windows (2010 or Later)
- Microsoft Excel for Mac (2016 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

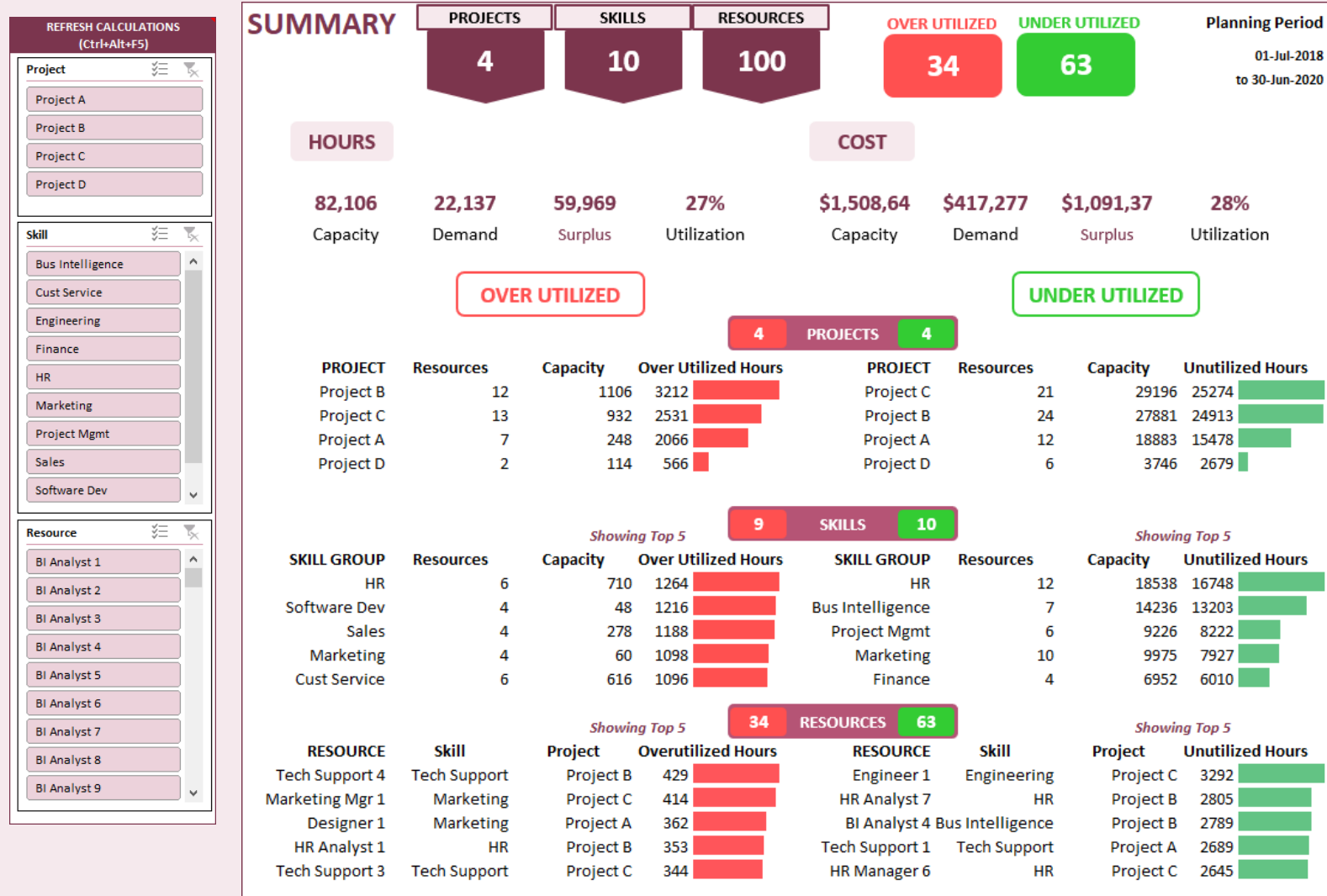
Enter demand as tasks with Hours of work for a specific date.

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	

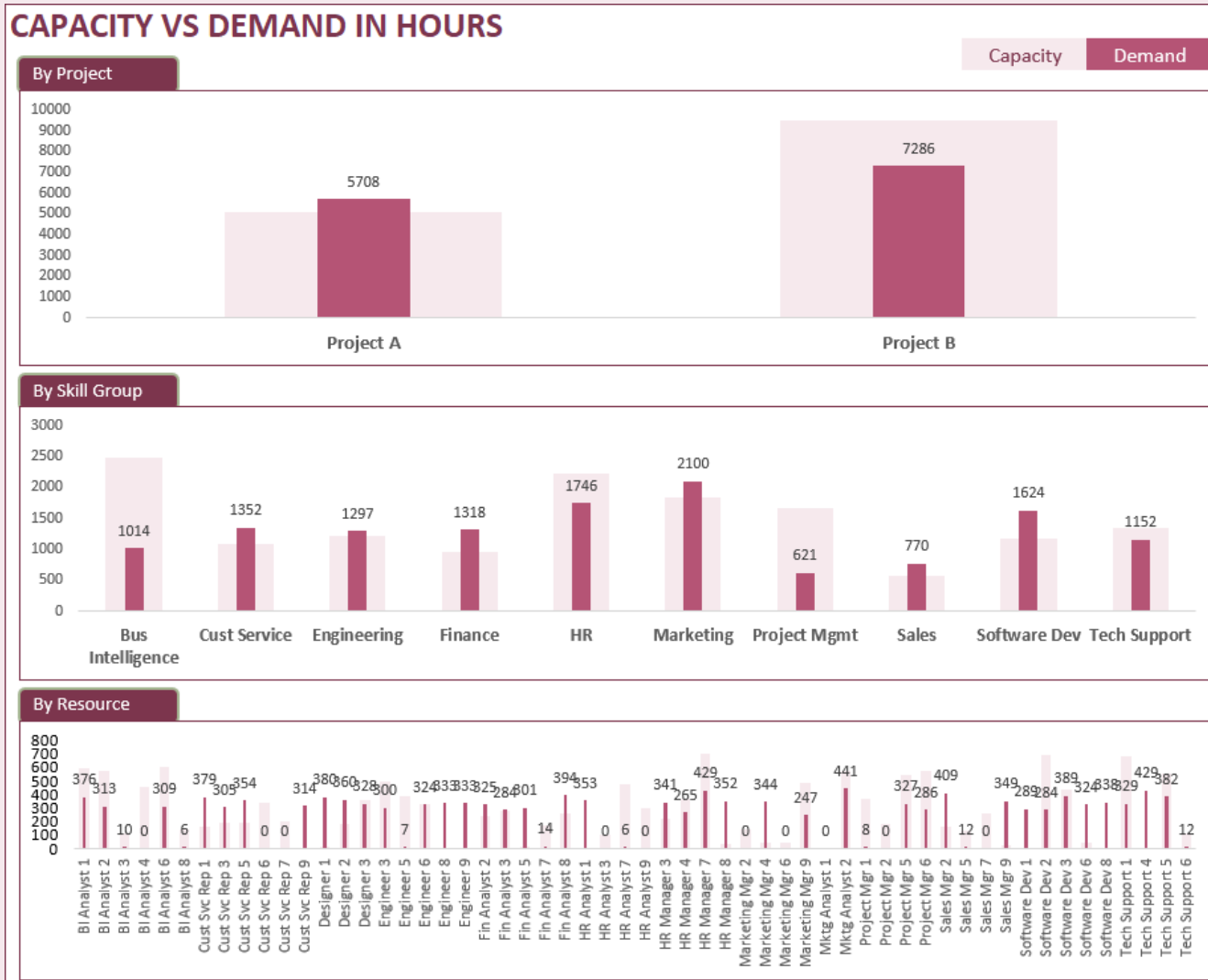
DASHBOARD

Dashboard with filters/slicers



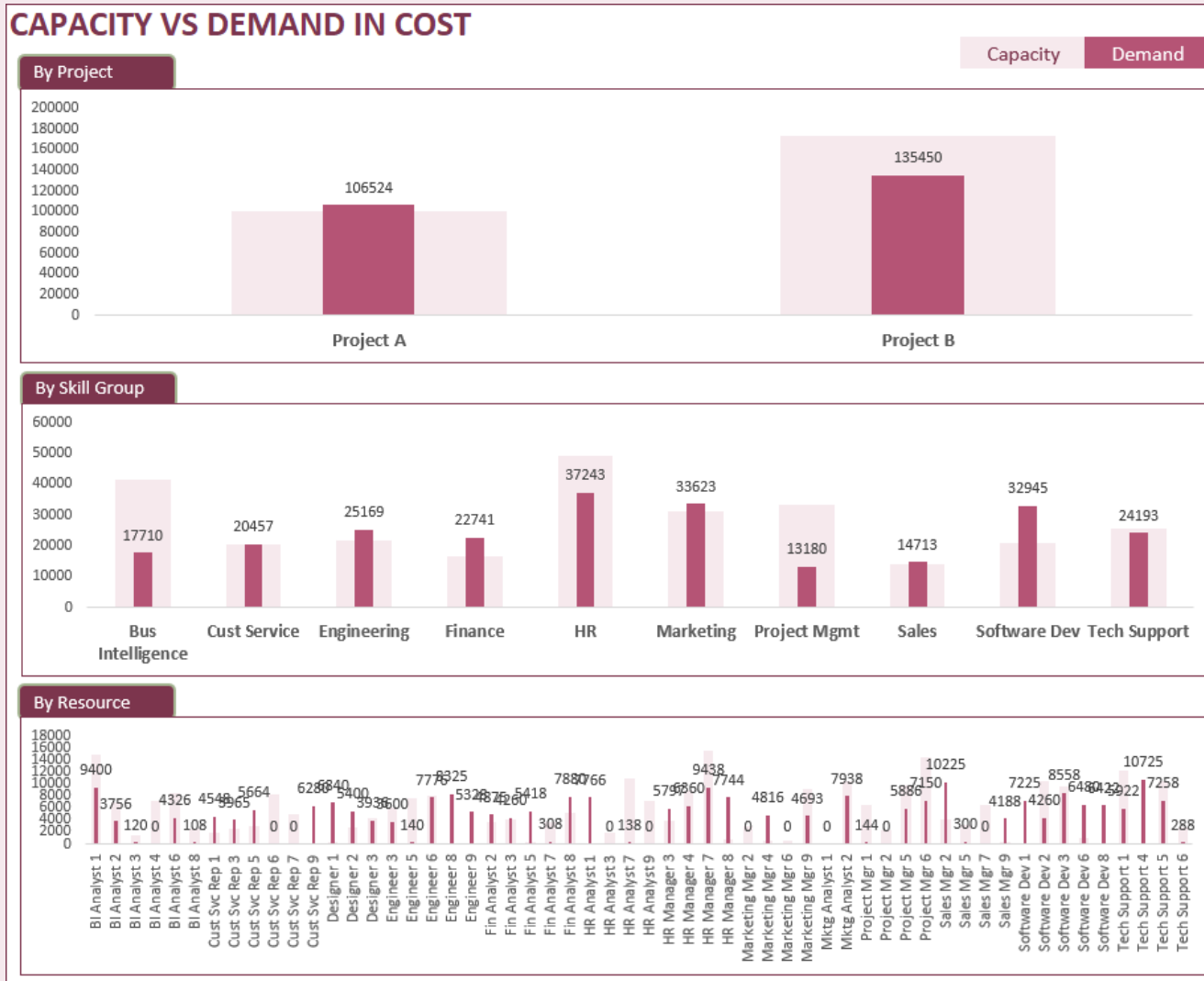
DASHBOARD

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

PROJECT

Measure

CALENDAR

Settings

Dimension RESOURCE

Measure CAPACITY

Unit CAPACITY

Time Dimension DEMAND

SURPLUS/DEFICIT

4 Selections

CALENDAR

Settings

Dimension RESOURCE

Measure CAPACITY

Unit HOURS

Time Dimension WEEKLY

CALENDAR

Settings

Dimension RESOURCE

Measure CAPACITY

Unit HOURS

Time Dimension DAILY

DAILY

WEEKLY

MONTHLY

QUARTERLY

ANNUAL

Time Dimension

CALENDAR

Settings

Dimension RESOURCE

Measure CAPACITY

Unit HOURS

Time Dimension HOURS

COST

Unit

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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