Resource Allocation

Situation

Team members are working on multiple projects, making it difficult to track how much work each individual is doing. Using Structure, you can quickly identify overallocation and underallocation, and reassign work on the fly.

Solution

Step 1

Insert issues from every project the team members are working on. The easiest way to do this is using an Insert generator to add all issues from specific projects or boards.

	Key	Summary	Assignee	
✶		≣ **Resource Allocation**		
		➕ Insert issues: **project = "Huge Project"**		
	HP-20	🔖 Additional Story 1	Anna M.	
	HP-19	🔖 Additional Story 2	*Unassigned*	
	HP-18	🔖 Additional Story 3	*Unassigned*	
	HP-17	🔖 Additional Story 4	*Unassigned*	
	HP-16	🔖 Story A	Albert	
	HP-15	🔖 Story B	*Unassigned*	
	HP-14	🔖 Story C	*Unassigned*	

Step 2

Open the Quick Transformations toolbar and select **By Assignee**, or add a Group by Assignee transformation. (Hint: they both do the same thing!)

Key	Summary	Assignee
🔍 Unresolved 🔍 Assigned to me By Assignee By Status By Version 🔗 Sub-tasks		
albert	▾ 😎 Albert	
HP-16	🔖 Story A	Albert
anna	▾ 🧑 Anna M.	
HP-20	🔖 Additional Story 1	Anna M.
JIRAUSER	▾ ⬡ Bob Robertson	
HP-11	🔖 Story F	Bob Robertson
	▾ 🗀 Unassigned	
HP-19	🔖 Additional Story 2	*Unassigned*

> ⚠️ This will create a grouping for every team member with at least one issue in the current structure assigned to them. If someone doesn't have any issues assigned to them, they won't appear here. To fix this, simply assign an unassigned issue to that team member, and a new grouping will appear.

Step 3

Add columns to compare workloads. We recommend one or more of these:

- Story Points (if you're using them)
- Original Estimate
- Remaining Estimate

Using the Totals columns, the values for each issue will be aggregated up to their assignee, so we can evaluate workloads at a glance.

Key	Summary	Assignee	Σ Original Est	Σ Story Poin
	🔲 Resource Allocation ⌄		📌 ⬨ ▽ 🔍 ‖‖ Basic view* ⌄	➕
⌕ Unresolved ⌕ Assigned to me ⊞ By Assignee ⊞ By Status ⊞ By Version 🔗 Sub-tasks			✏ ⌃ ✕	
albert	▸ 🟠 Albert		3d	10
anna	▸ 🟠 Anna M.		2d	5
JIRAUSER10701	▸ ⚪ Bob Robertson		1w	5
	▾ 📁 Unassigned		10w 2d 4h	195
HP-19	📗 Additional Story 2	*Unassigned*	4d	5
HP-18	📗 Additional Story 3	*Unassigned*	3d	5
HP-17	📗 Additional Story 4	*Unassigned*	4h	5

Step 4

To assign/reassign tasks, simply drag issues from one assignee grouping to another.

Key	Summary	Assignee	Σ Original Est	Σ Story Poin
	🔲 Resource Allocation ⌄		📌 ⬨ ▽ 🔍 ‖‖ Basic view* ⌄	➕
⌕ Unresolved ⌕ Assigned to me ⊞ By Assignee ⊞ By Status ⊞ By Version 🔗 Sub-tasks			✏ ⌃ ✕	
albert	▾ 🟠 Albert		1w 2d	15
HP-19	📗 Additional Story 2	Albert	4d	5
HP-16	📗 Story A	Albert	3d	10
anna	▾ 🟠 Anna M.		1w 4h	15
HP-20	📗 Additional Story 1	Anna M.	2d	5
HP-18	📗 Additional Story 3	Anna M.	3d	5
HP-17	📗 Additional Story 4	Anna M.	4h	5
JIRAUSER10701	▾ ⚪ Bob Robertson		2w	10
HP-15	📗 Story B	Bob Robertson	1w	5

Optional Enhancements:

- Limit the scope to a specific sprint by adding a Filter by Sprint transformation. (Haven't assigned sprints yet? Check out 2024-03-27_17-48-10_Backlog Grooming for Teams!)
- To allocate resources at the group level, group issues by a custom Team field instead of Assignee.
- Add a WSJF column to prioritize issues, and select Sum over sub-items to balance priorities across resources.
- Consider using Structure.Gantt - it can identify and resolve overallocation automatically!