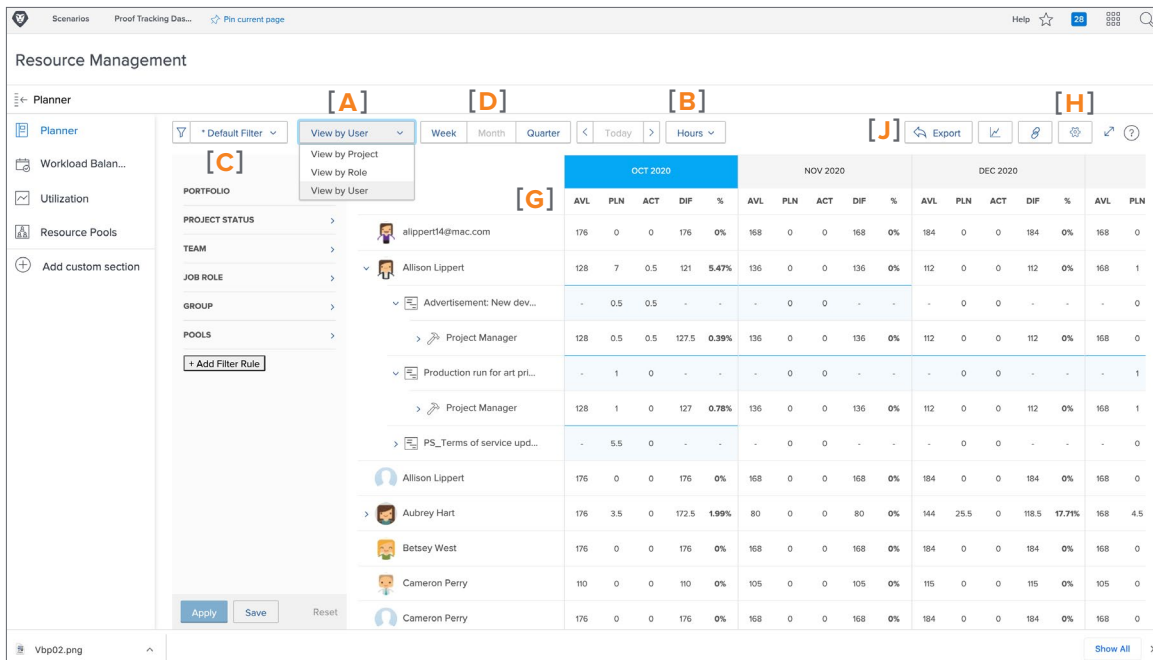


Resource planner overview

The resource planner gives you numbers on total available resource supply, individual project demand, the difference between the two, and what's left over.



VIEW AND FILTER RESOURCES

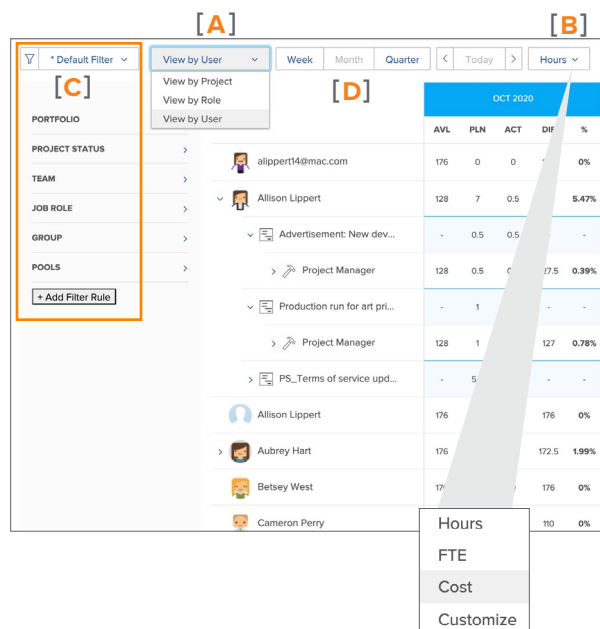
[A] View resources

- View by User—Gives insight into individual capacity and utilization.
- View by Role—Looks at capacity and utilization based on job role.
- View by Project—Shows the resources needed and available per project.

[B] You also can view resources by Hours, FTE (full time equivalent), or Cost.

Filter

Filter the results by one of the options found in the [C] filter menu and/or [D] by time frame.



Resource planner overview, continued

PRIORITIZE

Prioritize projects by **[E]** changing the number beside each project name to ensure your resources go to the most important projects. This is only applicable when the view is set to **[F]** View by Project.

	AVL (\$)	PLN (\$)	BGD (\$)	VAR (\$)	NET (\$)	AVL (\$)
1 > Shoe Promotion 2020	-	0	-	-	-	-
2 > Advertisement: New dev...	-	1120	-	-	-	-
3 > Software proposal	-	0	-	-	-	-

[G] RESOURCE DETAILS

- Available (AVL) column—This shows the number of available resource hours based on schedules and budgeted work. The numbers will vary based on the view being used.

[H] Recommended setting: Turn on Include hours from issues to get a more accurate view of the total available resource hours.

- Planned (PLN) column—The number showing here depends on the view being used.
 - View by User—Total number of planned hours from all work assigned to the user.
 - View by Role—Total number of planned hours from all work assigned to users in a specific job role.
 - View by Project—Total number of planned hours from all tasks assigned to users for the project.

	AVL	PLN	ACT	DIF	%	AVL	PLN	ACT	DIF	%	AVL	PLN	ACT	DIF	%
allipett14@mac.com	176	0	0	176	0%	168	0	0	168	0%	184	0	0	184	0%
Allison Lippert	128	7	0.5	121	5.47%	136	0	0	136	0%	152	0	0	152	0%
Advertisement: New dev...	-	0.5	0.5	-	-	-	0	0	-	-	-	0	0	-	-
Production run for art prin...	-	1	0	-	-	-	0	0	-	-	-	0	0	-	-
PS_Terms of service upd...	-	5.5	0	-	-	-	0	0	-	-	-	0	0	-	-
Allison Lippert	176	0	0	176	0%	168	0	0	168	0%	184	0	0	184	0%
Aubrey Hart	176	3.5	0	172.5	1.9%	168	0	0	168	0%	184	0	0	184	0%
Betsey West	176	0	0	176	0%	168	0	0	168	0%	184	0	0	184	0%

[I] Enter the time for resources to allocate to the project in the Budgeted (BGD) column. Then compare the planned and budgeted columns with the Variance (VAR) column. These columns are available with View by Project and View by Role.

	OCT 2020					NOV 2020					DEC 2020				
	AVL	PLN	BGD	VAR	NET	AVL	PLN	BGD	VAR	NET	AVL	PLN	BGD	VAR	NET
> D1-Website Development...	5192	136.13	150	13.87	5042	4856	523.77	0	-223.77	4856	5376	384.03	0	-384.03	5376
> Advertisement: New dev...	5042	73.5	74	0.5	4968	4856	111	0	-111	4856	5376	0	0	0	5376
> Production run for art prin...	4968	5	50	45	4918	4856	91.6	0	-91.6	4856	5376	30.9	0	-30.9	5376
> Software proposal	2204.12	0	79	79	2125.12	2056	0	0	0	2056	2352	0	0	0	2352

[J] EXPORT

Export the information shown in the planner to an Excel spreadsheet for a “hard” copy of the data or to see data for longer periods of time, such as 12 months.

	BDG (\$)	VAR (\$)	NET (\$)	AVL (\$)	PLN (\$)	B
Nov 08 - 14 W46 2020	-	-	-	-	0	
Nov 15 - 21 W47 2020	-	-	-	-	0	