



Resource Management Tools

		PROJECT RESOURCE SCHEDULER	TEAM “WORKING ON” SCHEDULER	WORKLOAD BALANCER	RESOURCE PLANNER (VIEW BY USER)	RESOURCE PLANNER (VIEW BY PROJECT/ROLE)
When To Use		<ul style="list-style-type: none">View and assign near-term work for a single project.	<ul style="list-style-type: none">View near-term allocation for a team and make team-based work assignments.	<ul style="list-style-type: none">View and assign near-term work across multiple projects.	<ul style="list-style-type: none">View medium to long term work allocation for people to identify overallocation or underutilization.	<ul style="list-style-type: none">View long term work demand against workforce availability to identify the capacity to perform existing and new work initiatives.
Timeframe		<ul style="list-style-type: none">1–6 weeks	<ul style="list-style-type: none">1–6 weeks	<ul style="list-style-type: none">1–6 weeks	<ul style="list-style-type: none">4 week to 4 quarters	<ul style="list-style-type: none">4 weeks to 4 quarters
Description		<ul style="list-style-type: none">Visual timeline of unassigned work and current workload of eligible resources.Assign individual work items using drag-and-drop.Use bulk actions to assign all work for a designated job role to an individual.	<ul style="list-style-type: none">Visual timeline of unassigned work and current workload of team members.Assign individual work items using drag-and-drop.	<ul style="list-style-type: none">Visual timeline of unassigned work and current workload of eligible resources.Assign individual work items to eligible resources.Rebalance (Contour) planned hours to existing work assignments.	<ul style="list-style-type: none">View and Report the aggregated planned hours assigned to users for a given week, month, or quarter.View and Report the aggregated actual hours entered by users for a given week, month, or quarter.If more work is assigned to a user than they have available, the hours difference and percentage will show in red to represent over-allocation.	<ul style="list-style-type: none">Prioritize projects to reflect the future demand which will compete for limited resources.Edit Budgeted Hours by manual entry or the “Set Roles’ Planned Hours as Budgeted” tool.As each project in the list consumes resources, less capacity remains for lower priorities.Review the Net Remaining to identify Job Roles that run out of capacity.
Work Manager		<ul style="list-style-type: none">Project Managers	<ul style="list-style-type: none">Department and Team Managers	<ul style="list-style-type: none">Traffic and Resource Managers	<ul style="list-style-type: none">Resource Managers	<ul style="list-style-type: none">Resource Managers and Leadership
Best Practice Pre-Requisites		<ul style="list-style-type: none">Project Tasks with Durations, Job Role Assignments, and Planned Hours.Users setup with Job Roles	<ul style="list-style-type: none">Teams with Users.Project Tasks with Durations, Team Assignments, and Planned Hours.	<ul style="list-style-type: none">Project Tasks with Durations, Job Role Assignments, and Planned Hours.Users with Job Roles.	<ul style="list-style-type: none">Users with availability Schedule and Full Time Employment (FTE) value.Project Tasks with durations, User Assignments, and Planned Hours.	<ul style="list-style-type: none">Users with availability Schedule, Full Time Employment (FTE) value, and Resource Pools.Projects with Resource Pools and Budgeted Hours for each Job Role.
Outcome		<ul style="list-style-type: none">Ensure that all project work is assigned to resources with availability.	<ul style="list-style-type: none">Ensure that all team-based work is assigned to resources with availability.	<ul style="list-style-type: none">Ensure that resources workload is balanced and make assignments to new work based on resources availability.	<ul style="list-style-type: none">Identify over/under allocations to individual resources for medium to long term planning.	<ul style="list-style-type: none">Prioritize projects and their budgeted effort to evaluate the future demand work as compared to workforce capacity.Identify which job roles will experience capacity shortages to make decisions on at-risk projects.