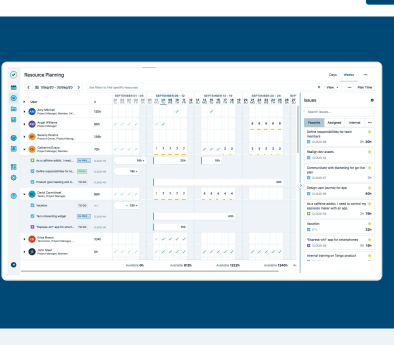
Resource Planning with Tempo Planner for Jira: The Complete 2020 Guide

Sarah Fletcher
30 September 2020



Back to blog

Topics:

Resource Planning

This beginner's guide presents the basics of Tempo Planner, a tool for resource planning and capacity reporting that's seamlessly integrated into Jira. Read on to learn the benefits, how-tos, tips & tricks, and more for this popular add-on.

Here's what you'll learn:

- 4 reasons why you should get a resource planning tool
- What is Tempo Planner?
- Get a bird's eye view with the Resource Planning view
- How to plan time and allocate resources using Tempo Planner
- Drill down into data with Planned Time reports
- See how much time is available with the capacity report
- Estimate time accurately and overcome the planning fallacy
- Tempo Planner and Tempo Timesheets, more effective together
- What's coming for Tempo Planner in Fall 2020

4 reasons why you should get a resource planning tool

Proper resource planning is critical for both large and small businesses. Some reasons to invest in a resource planning and capacity reporting tool include:

1. Resource managers can optimize available resources and find the resources needed for tasks and projects, even from other teams.
2. Executives can look at where resources have time available to understand where business opportunities lie or determine whether more staffing is needed.
3. Resource managers can make more effective decisions based on comprehensive real-time data rather than static calendars.
4. Teams can get organized with simple and efficient communication of priorities.

What is Tempo Planner?

When it comes to optimizing capacity and organizing workloads, there's nothing like Tempo Planner to get the job done.

Basically, Tempo Planner is an effective and efficient resource planning and capacity reporting tool that provides visibility into an organization's most valuable asset: its time. With Tempo Planner, managers and executives can see the capacity of available resources in one place, whether they are in different office locations or working remotely. They can also create plans, which are a record of time allocated to work on projects.

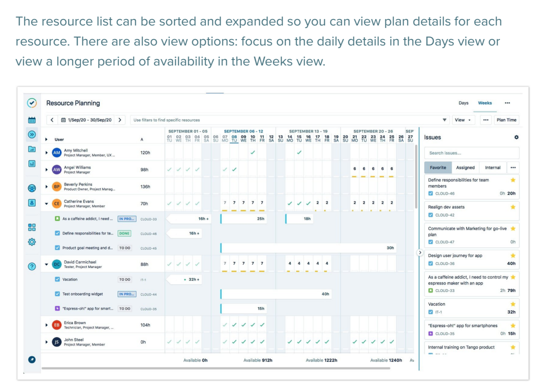
The app provides a critical view across an organization to allow for effective decisions based on real-time data rather than static calendars. It is the only tool in Jira that allows planning for multiple resources on one issue.

Tempo Planner is available on the Atlassian Marketplace with a free 30-day trial, or can be purchased through your local partner. It is compatible with Cloud, Server, and Data Center.

Get a bird's eye view with the Resource Planning view

If you're a resource manager or high-level director who needs to search for available resources and plan out projects in advance, the Resource Planning view can help. It allows you to see all your resources along with their allocation. Discover how much total time is available for the designated period as well as the time available for each resource. You can also do team planning in the Resource Planning view.

The resource list can be sorted and expanded so you can view plan details for each resource. There are also view options: focus on the daily details in the Days view or view a longer period of availability in the Weeks view.



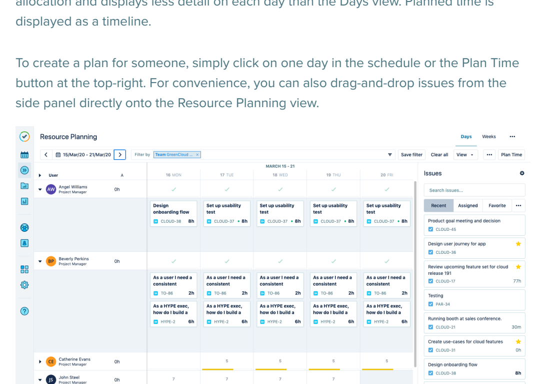
How to plan time and allocate resources using Tempo Planner

There are several scenarios for using Tempo Planner: resource managers/directors can allocate resources to projects, team leads can create plans for their team members, or team members can create plans for themselves, such as mapping out their vacation time.

It's easy to plan time for team members. The Days view in the Resource Planning section is ideal to see your team's plans for the week when you're managing their short-term work, such as moving or copying plans from one team member to another to get everyone fully booked.

The Weeks view provides a longer term overview of availability and is optimized for managing longer running plans. It gives a high-level daily overview of resource allocation and displays less detail on each day than the Days view. Planned time is displayed as a timeline.

To create a plan for someone, simply click on one day in the schedule or the Plan Time button at the top-right. For convenience, you can also drag-and-drop issues from the side panel directly onto the Resource Planning view.



Drill down into data with Planned Time reports

Reports let you gather data from plans from yourself or others, such as your team, department, or even your company. With these reports, you can gain insight into your business and share data with others.

Filter and display the results however you want to display it. Then, save the report so you can run it again whenever you need it. Use these Planned Time reports to manage your data, and print or export your report data for later use.

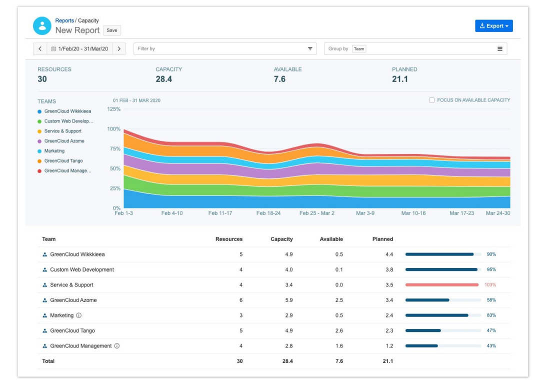
You can create reports from the Resource Planning view or the Reports Overview, where you can also access any saved reports.

See how much time is available with the capacity report

Nobody wants their team members to be under- or over-allocated. An under-allocated team member may feel bored and unsatisfied, while an overallocated team member will become stressed and frustrated with an overwhelming workload.

Tempo Planner's capacity report can help. The capacity report presents the time planned for a team member relative to the time they have available. You can report on staff capacity by team, role, user, location, program, account, and project.

Resource managers can search for available resources for an upcoming project and determine who is and is not booked. In this way the capacity report supports resource managers in securing resources.



By providing data on your team's work efforts, the capacity report makes it easy to request additional resources when needed or to estimate future hiring needs. At a glance, you can see which of your team members are available and make sure you're making the most of your resources.

It makes sense to check the capacity report frequently because it's common for users to underestimate how much work is needed for a project (see next section). It can be a challenge to keep a project on time and on budget without demanding overtime from staff.

Viewing resource capacity requires the View Team Plans permission for the teams to which the resources belong.

The capacity report is available for Server and is coming for Cloud in Fall 2020.

Learn to estimate time accurately and overcome the planning fallacy

It's common to underestimate how long projects and tasks will take to finish. People are often unable to accurately gauge the amount of time needed to complete something, which is called the planning fallacy.

"The planning fallacy is that you make a plan, which is usually a best-case scenario," psychologist Daniel Kahneman writes. "Then you assume that the outcome will follow your plan, even when you should know better."

"You simply do not anticipate problems, which you should, because statistics show that you probably will end up spending twice as much money and time as you have budgeted," he continues. "But people don't anticipate accidents, and they don't anticipate their own changes."

Why does this happen? Most of us see ourselves as more skilled than we really are and assume that the goals we set out for ourselves are readily achievable. This is called the optimism bias, which helps to account for the planning fallacy.

So, if you find your time estimates for Tempo Planner are always underestimated, what can you do?

- ### Look to the past

  One way to overcome the planning fallacy is to get information about similar projects you have finished in the past so you can compare. If you want to know how long it would take you to fix a particular bug or finish a piece of code, simply look at how long similar tasks have taken you in the past.

- ### Assume the worst-case scenario

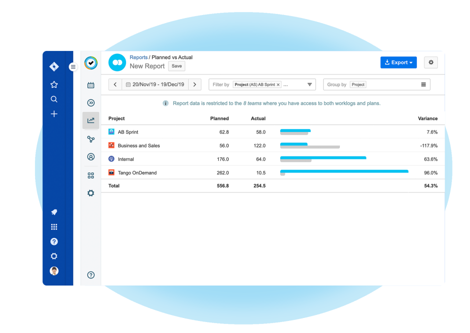
  Success is easier to imagine than failure. When estimating how long a given task will take, allow for interruptions and roadblocks along the way. Do not assume everything will go as smoothly as you imagine, because it probably will not.

It takes experience to accurately estimate time, and tasks will virtually always take longer than originally imagined. With some practice, you can get a handle on how long tasks actually take.

Tempo Planner and Tempo Timesheets, more effective together

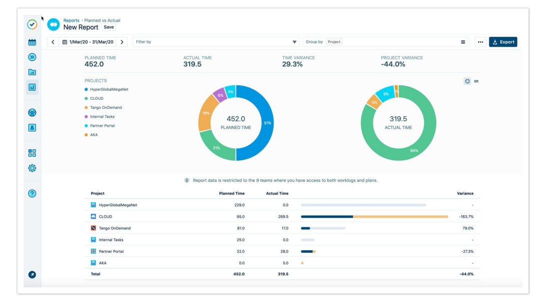
Tempo Planner is especially powerful when combined with Tempo Timesheets, a time tracking tool for Jira.

When Tempo Planner teams up with Tempo time tracking, team leads can limit unknowns and build future resource plans. One of the powerful features that's included when combining Tempo Timesheets and Tempo Planner is the Planned vs. Actual report.



The Planned vs. Actual report allows you to compare planned vs actual time logged to improve estimates and account for effort variance in future projects. It helps teams and their leads to monitor the progress of projects.

The main components of the report are planned hours and actual hours logged, as well as the variance; that is, the difference between planned vs. actual. With this report users can determine how long projects actually take and learn to make better estimates, opening the door to greater profitability.



What's coming for Tempo Planner

We've been hard at work on updating Tempo Planner in line with customer ideas and feedback. Here are some things to look out for:

- ### Create plans automatically from imported Jira issue data

  Currently, users need to manually create plans after assigning Jira issues to resources. With the Import Jira functionality, plans will be automatically created in Planner based on data from imported Jira issues.

- ### Planner automation - calendar integration

  This feature will allow users to sync their calendars with Tempo Planner, which will provide a number of benefits, such as gaining insights into resource availability and capacity. Another example is a clearer overview of time off in vacation planning. Get all the information consolidated in one place and avoid duplication of entries.

- ### Capacity report for Cloud

  When planning resources it's important to understand capacity based on planned work and available staff. This feature will bring the new Capacity Report, currently available on Server, to Cloud.

Some final comments

In this starter guide for Tempo Planner, we've presented the layout of the add-on for Jira and some of the main features included in the app.

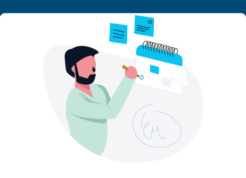
We've covered the resource planning view, the capacity report, the planned vs. actual report, as well as practical considerations for resource planning like the planning fallacy.

There are plenty of other features to discover, like permissions, plan approvals, and more.

Tempo Planner is available on the Atlassian Marketplace with a free 30-day trial.

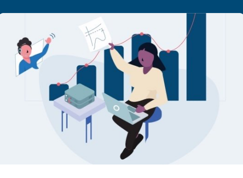
Try Planner

Latest posts



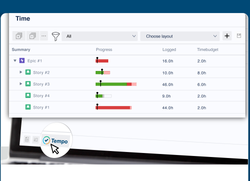
Collaborate across departments with Tempo Planner

11 September 2020



Leading remote teams - learnings from a manager who has been there

31 August 2020



Easier Reporting: combine Tempo Timesheets with Epic Sum Up for Jira

28 August 2020

Subscribe to our blog

Get the inside scoop, previews, news and other fun stuff.

Email address *

Email

Tempo needs the contact information you provide to us to contact you about our products and services. You may unsubscribe from these communications at any time. For information on how to unsubscribe, as well as our privacy practices and commitment to protecting your privacy, please review our Privacy Notice.

Submit

Back to blog

© Tempo 2020

Legal | EULA | Privacy Policy
Website by blend