



# Resource management

## Introduction

The Resource Module is designed to satisfy the need to publicise and manage the resource requirement of a project and/or enquiry. It provides a company-wide 'rough-cut' view of resource allocation and hence allows simple allocation of additional resource based on current availability. Additional facilities allow 'what-if' style scenarios to be created and subsequently committed or abandoned. The on-screen reporting provides a clear view of resource allocation by company, branch, line manager or grade.

## Main features

- Periods (defined as weeks) can be viewed in 4 modes; high, medium, low and tiny to allow full visibility of current and future allocations.
- An editing facility, access to which is controlled by the Workspace security system, allows the resource plan to be adjusted based on simple 'drag & drop' entry of people at pre-defined allocation levels.
- The editing grid highlights periods outside of the actual project start and finish date providing a useful visual aid for the planning period.
- An on-screen enquiry facility allows users to search for available resource.
- Colour coding identifies the cumulative allocations of an individual's time in any given period.
- Over-allocation of resource is immediately identified in red with a note identifying the other allocations for the individual causing the problem.

- On screen views provide a list of all the people allocated to a particular project or enquiry, and a list by individual of all projects and enquiries that they are allocated to.
- A global resource report provides a company or branch wide resource plan in both on screen and in PDF format.
- Any new plan can be saved once completed, or the previous plan reinstated if a 'what-if' exercise did not work satisfactorily.
- Integration with the Workspace Leave module so that any holidays requested and approved are represented as part of a contact's allocation.

## Who uses it?

The key to the popularity of Resource Management is ease of use when creating a plan and the vastly improved visibility it delivers as a result. The ability to instantly see a problem, and the reason for it, is particularly effective. The module provides major benefits to any organisation that is struggling to match their people with the demands of their clients.