Tempo

The Complete Guide to Resource Planning

with Tempo Planner for Jira

The **Complete Guide**
to Resource Planning with Tempo Planner for Jira

This beginner's guide presents the basics of Tempo Planner, a tool for resource planning 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**

5 reasons why you should get a **resource planning tool for Jira**

Proper resource planning is critical for businesses of all sizes. Some reasons to invest in a resource planning tool for Jira include:

1 Project managers and team leads can optimize available resources and find the staff needed for tasks and projects, even from other teams.

2 Project managers can make more effective decisions based on comprehensive real-time data rather than static calendars.

3 The executive team can look at where resources have time available to understand where business opportunities lie or determine whether more staffing is needed.

4 Team members can get organized with simple and efficient communication of priorities.

5 Enterprise administrators can drive more integration between Jira, Tempo and their ecosystem of solutions.

What is Tempo Planner?

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

The app is an effective and efficient resource planning tool that provides visibility into an organization's most valuable asset: its time. With Tempo Planner, project managers and executives can see the availability of 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.

Tempo Planner provides a comprehensive view across an organization to allow for effective decisions based on real-time data rather than static calendars. The app also facilitates much-needed transparency across teams. With all the work centralized in one place, communication among and between departments is easy.
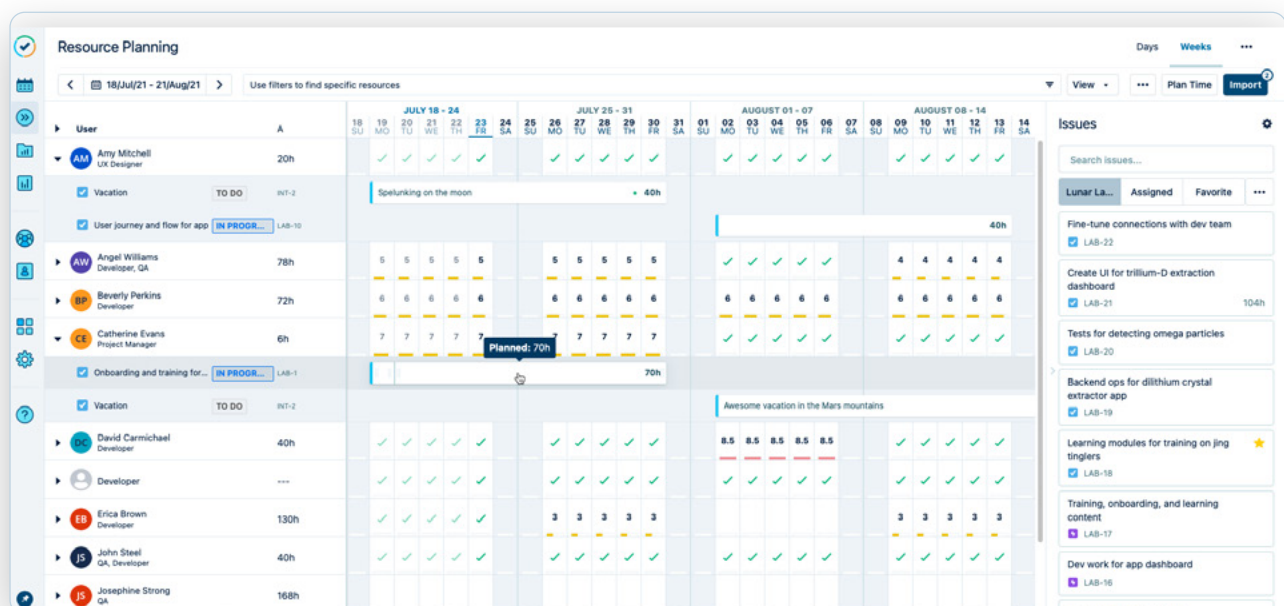
Project managers can schedule individuals and teams on a project, task or ticket level. Tempo Planner is the only tool in Jira that allows planning for multiple resources on one issue. Allocating or requesting resources for high-impact initiatives is simple, and users can easily see whether workloads are balanced and realistic. With Tempo Planner, project managers can see at a glance whether business proposals are aligned with resource availability.

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 project manager or C-suite executive 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. With the Resource Planning view, it's easy to effortlessly review several commitments at once. You can also do team planning to simplify capacity and progress monitoring.

The resource list can be sorted and expanded so you have extended visibility into plan details for each team member. There are also view options: focus on the daily details in the Days view or have a look at a longer period of availability in the Weeks view.
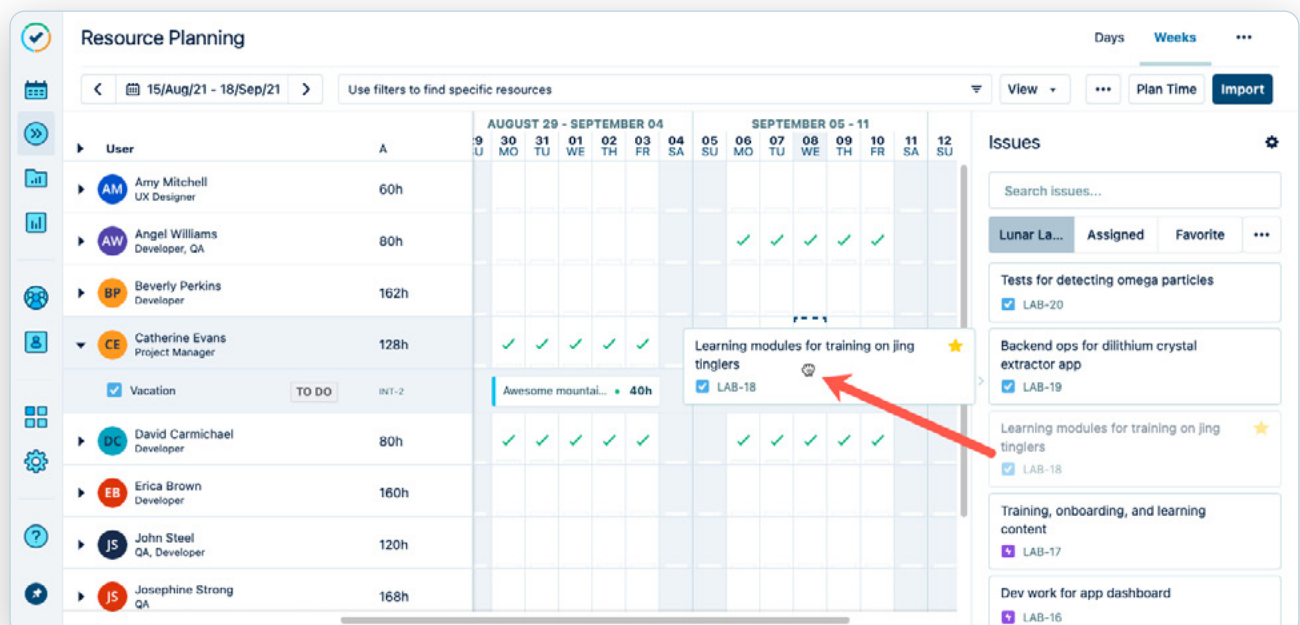
How to plan time and allocate resources using **Tempo Planner**

There are several scenarios for using Tempo Planner: project 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.

Creating plans can take time, especially when you or your team members have already spent time setting up Jira projects and creating issues. With the Import Jira functionality, you can import the data that's already in the Jira issues and create plans from them in the Resource Planning view. This helps to reduce the amount of time and effort needed for planning.

Another powerful functionality is the calendar integration, which allows users to display Google & Office 365 calendar events in Tempo Planner for Cloud. It provides a number of benefits, such as offering insights into resource availability and capacity, as well as a clearer overview of time off in vacation planning. Get all the information consolidated in one place and avoid duplication of entries.

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 actionable insights 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.

New Report Save

< 📅 1/Apr/20 - 30/Apr/20 >   Filter by Team Redflare × ≡   Group by 1. Project ≡   Grid view (Days) ▾   ...   ⬇ Export

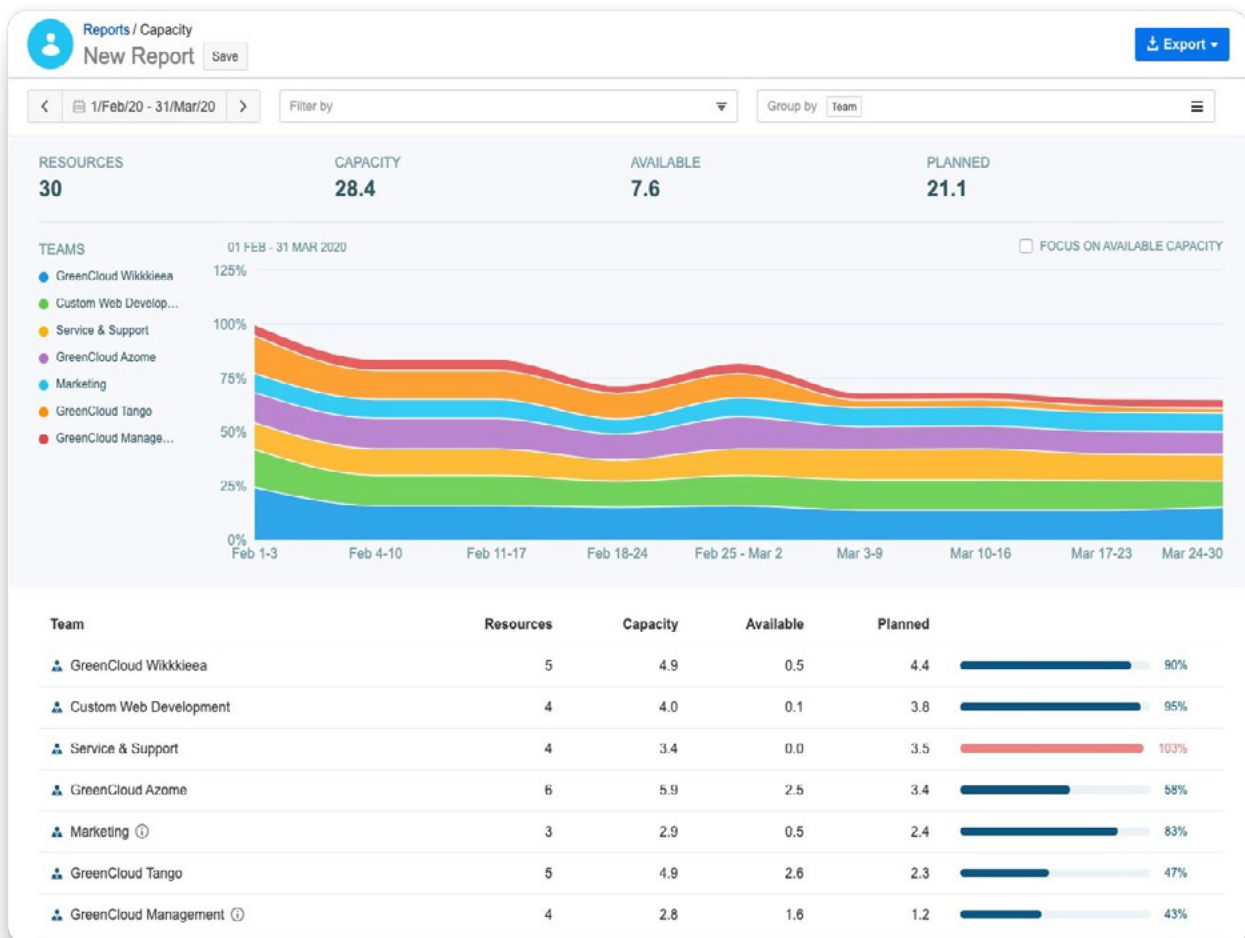| Project / User / Issue ⬍	Key	Planned	01 WE	02 TH	03 FR	04 SA	05 SU	06 MO	07 TU	08 WE	09 TH	10 FR	11 SA	12 SU	13 MO
☁ CLOUD	CLOUD	104	2	6	5			9	9	9	9	9			5
👤 Amy Mitchell		23	2	1				4	4	4	4	4			
☑ Design onboarding ...	CLOUD-38	21		1				4	4	4	4	4			
☑ Internal training on ...	CLOUD-32	2	2												
👤 Angel Williams		81		5	5			5	5	5	5	5			5
☑ Create training mat...	CLOUD-40	16													
☑ Set up usability test	CLOUD-37	65		5	5			5	5	5	5	5			5
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👤 Amy Mitchell		10			3							7			
☑ Team building	IT-7	10			3							7			
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Total		**177**	14	20	20	0	0	9	12	12	9	16	0	0	5

See how much time is available with the capacity report (coming soon for Cloud)

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.

Project 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 Data Center and is coming for Cloud.

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.
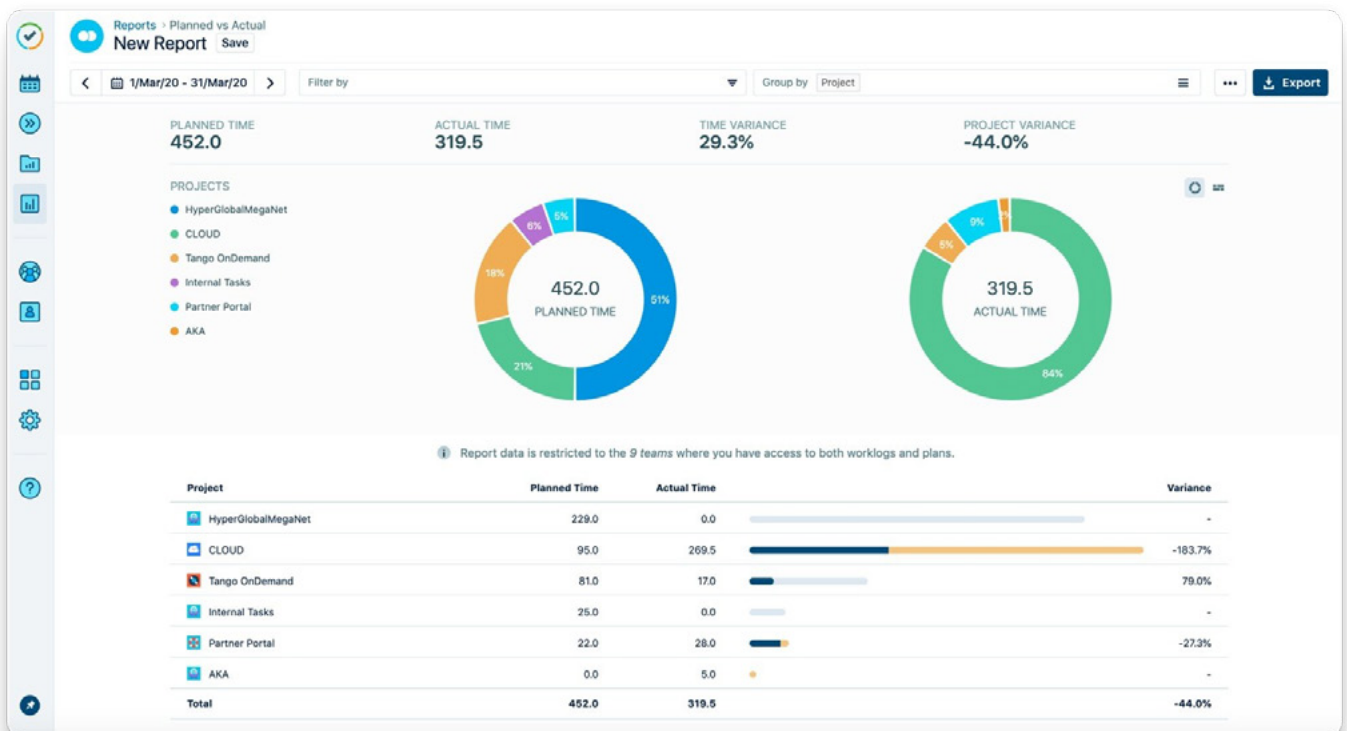
Tempo Planner and Tempo Timesheets, **more effective together**

Tempo Planner is especially powerful when combined with Tempo Timesheets, the #1 time tracking tool in the Atlassian Ecosystem.

When Tempo Planner teams up with Tempo time tracking, team leads can limit unknowns and build future resource plans more accurately to limit the impact of the planning fallacy. 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.

Integrate with Tempo Planner for even greater effectiveness

One of the great advantages of Jira is the potential for customization with different apps in the Atlassian Marketplace. For example, the time planned with Tempo can be read by ScriptRunner to send daily emails. In these emails, the information from the work items logged on Tempo Planner are listed to communicate what every team member will be doing.

As another example, the EazyBI integration with Tempo Planner reads the planned hours for each calendar week and provides the number of available hours for each team member, effectively substituting the use of Team Calendars.

Learn more about Tempo integrations.

What's coming for Tempo Planner

We've been hard at work on updating Tempo Planner in line with customer ideas and feedback. We know that when planning resources, it's important to understand capacity based on planned work and available staff. One upcoming feature for Planner will bring the Capacity Report, currently available on Server and Data Center, 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. Take a look at this webpage to learn more.

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