



# **10+ Examples of Essential Resource Management Reports for**

**Delivery, Project and Resource Managers**



# Contents:

<b>Introduction</b>	3
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## **Resource Planning Reports**

Resource Demand Projection	6
Over-Loaded and Under-Loaded Staff	7
Team Workload Projections	8
Resources Falling	9
Resource Utilization	10
Resource Capacity Planning	11
Resource Capacity Planning by Category	12

## **Resource Loading Reports**

Resource Loading by Skill	13
Resource Loading by Team/Department	14
Resource Loading and Capacity by User	15
Resource Loading by Department / Practice Type	17

# Introduction

Welcome to "10+ Examples of Essential Resource Management Reports for Project, Resource, and Delivery Managers" – your ultimate guide to mastering the art of efficient and effective resource management. In today's competitive business landscape, organizations need to make the most of their resources in order to stay ahead of the curve. Whether you're a project, resource, or delivery manager, having a comprehensive understanding of resource management is crucial for the success of your projects and, ultimately, your organization.

In this ebook, we will delve into the most crucial resource management reports, offering you over ten practical examples of reports that will help you to optimize resource allocation, maximize productivity, and ensure the timely delivery of your projects. Each example is designed to provide you with valuable insights into the key components and best practices of resource management, allowing you to make informed decisions and maintain control over your resources. By analyzing data on resource allocation and performance, organizations can identify areas for improvement, optimize resource allocation, and ultimately improve their overall performance and profitability.

Whether you're a seasoned professional or just starting your journey in the world of resource management, this guide is designed to provide you with practical, actionable examples that you can immediately apply in your daily work.

# Resource Planning Reports

# Resource Planning Reports

Resource planning reports are crucial in project management, as they outline projected resource requirements for each project phase.

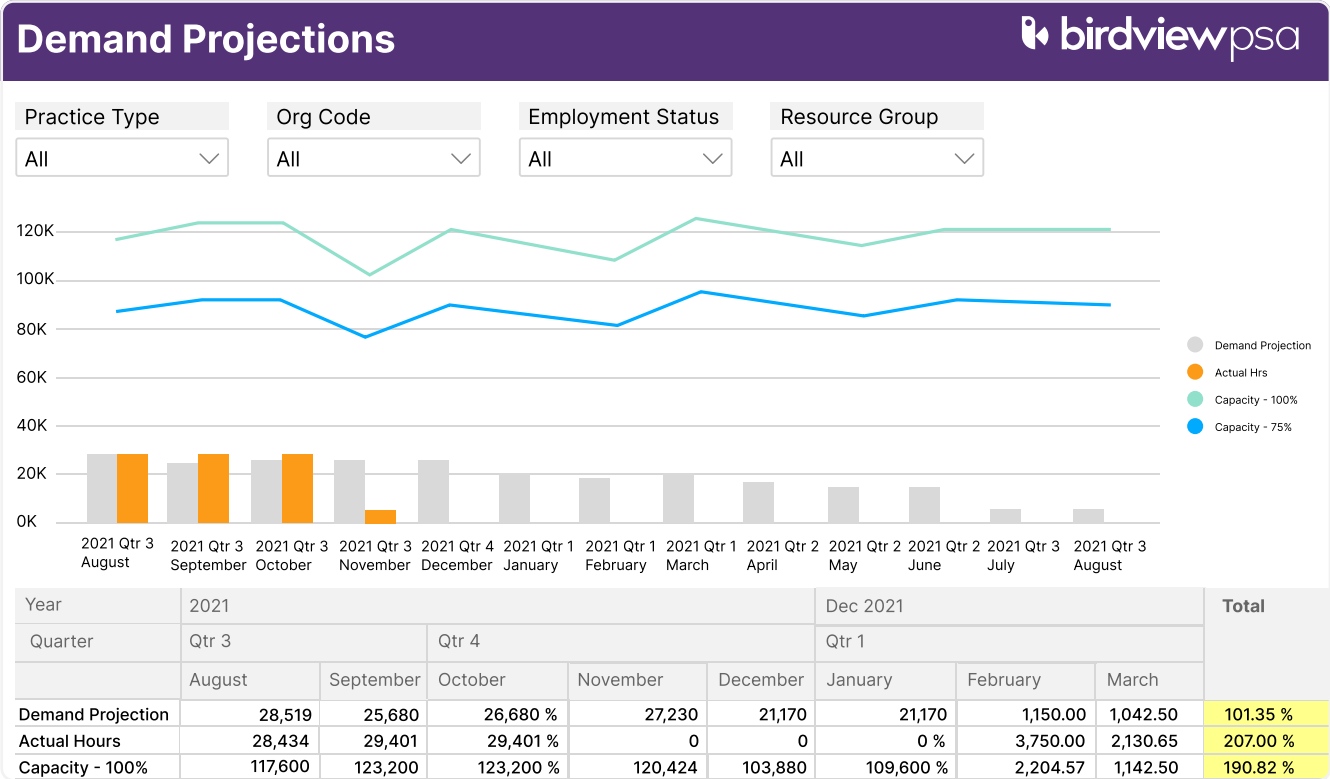
These reports allow managers to make informed decisions on hiring, training, and procurement, while identifying potential risks and gaps in resource availability. Effective resource planning reports contribute to enhanced efficiency, reduced costs, and improved project outcomes, highlighting their importance in successful project execution.

# Resource Demand Projection

Creating a resource demand projection report is a crucial step in **forecasting the team’s loading and capacity**. Without this report, planning the team’s work efficiently and determining whether additional resources are needed becomes impossible.

The report **compares currently assigned hours with the demand projection**. With the help of filters, the search can be narrowed down to specific categories such as type of activity, department, or team.

The diagram in the report enables managers to quickly evaluate the current situation and trends without having to examine detailed figures.



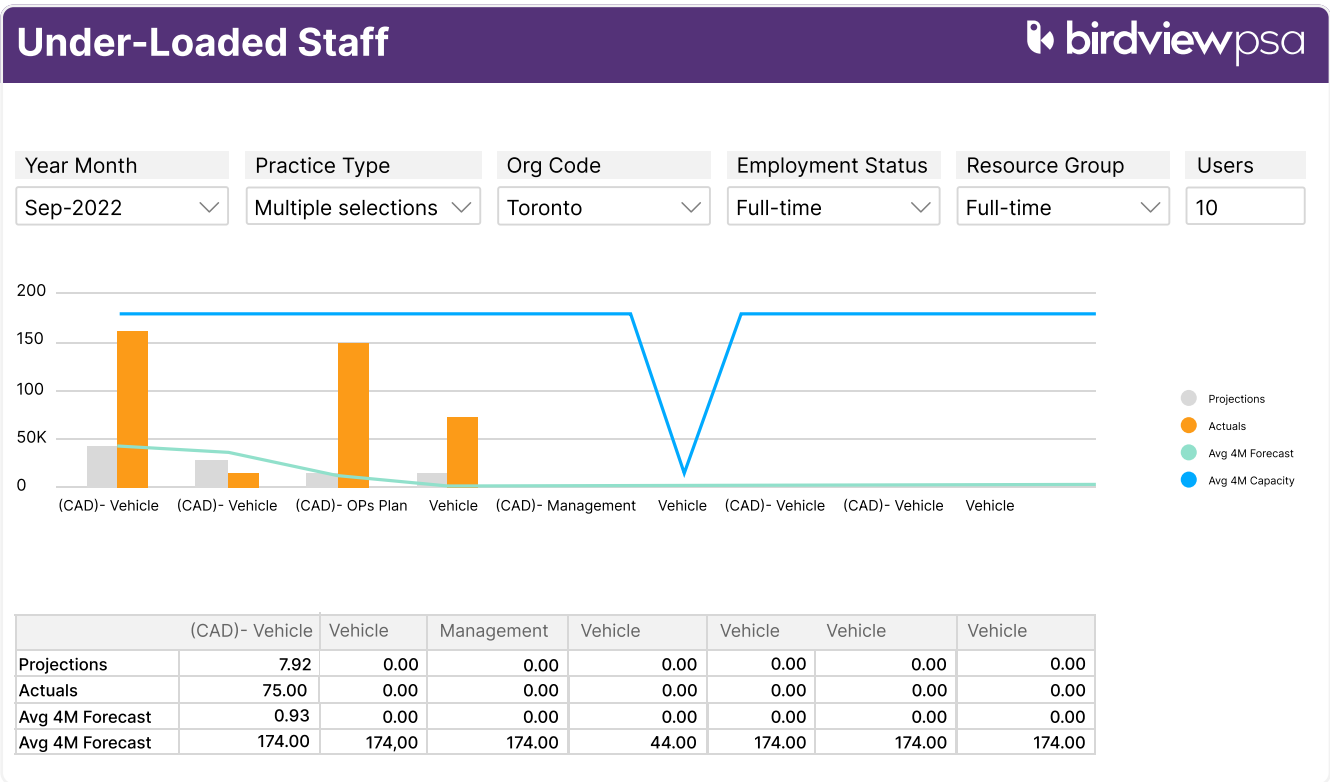
# Over-Loaded Staff and Under-Loaded Staff

Reviewing **the workload of your staff and identifying teams that are consistently overloaded** is essential for maintaining a healthy work environment in the company or department, taking care of your coworkers, and preventing negative outcomes resulting from staff working under stress.

On the other hand, the underloaded staff report helps you quickly identify potential capacity and optimize the distribution of work among staff members in the best possible way.

The overloaded and underloaded staff report can be even more informative if it includes filters such as date range, workload type, team, department, or any other custom fields required.

The report provides a **projection of staff loading within a selected date range, average capacity, actual assigned hours, and projected resource potential.**



# Projections Report


Every efficient manager wants to see not only the history of resource loading and hours distribution among their teams and co-workers but also projected workload.

Team workload projections reports allow the manager to view well in advance workload distribution by project, task, team, and individual user. Data pulled from the reports help the manager assess the risks involved and make changes to the plans and projects if need be.

Projections reports are designed to help the manager to:

- evaluate the actual capacity of their teams,
- early detect any deviations from projected loading,
- estimate the potential and capacity of fully and partly available teams.

Projections Report



Project Number	Project Manager	Employee Id	Project Task Hierarachy L1, L2, L3, L4		Resource Group		Date	
All	All	All	All		All		8/1/22	9/1/23

					Actuals				Estimate
Project Name	Project Manager	Task Status	Task Name	User Name	Aug 23	Sep 23	Oct 23	Nov 23	Nov 23
Mobile Phone Projector	James Fletcher	Active	Planing	Rob Ramsarran	40.00	350.00	200.00	17.00	800.00
			Final Release	Toni Hanson	56.00	150.00	80.00	75.00	450.00
			Execution	Rob Ramsarran	60.00	80.00	140.00	55.00	140.00
			Total	156.00	580.00	420.00	147.00	1,390.00	
			Hardware Test Plan (HWTP)	Amelia Wilson	24.00	8.00	158.00	65.00	500.00
				Andrew McConnell	154.00	10.00	105.00	77.00	56.00
			Project Plan Development	Emily Johnson	35.00	54.00	75.00	45.00	85.00
				Total	213.00	72.00	338.00	187.00	641.00
			Total						
Overhaul Program		Active	Planing	Amanda Smith	55.00	450.00	45.00	85.00	150.00
				Toni Hanson	230.00	78.00	154.00	240.00	67.00
				Rob Ramsarran	60.00	56.00	121.00	8.00	10.00
				Total	345.00	584.00	320.00	333.00	227.00



# Resources Falling

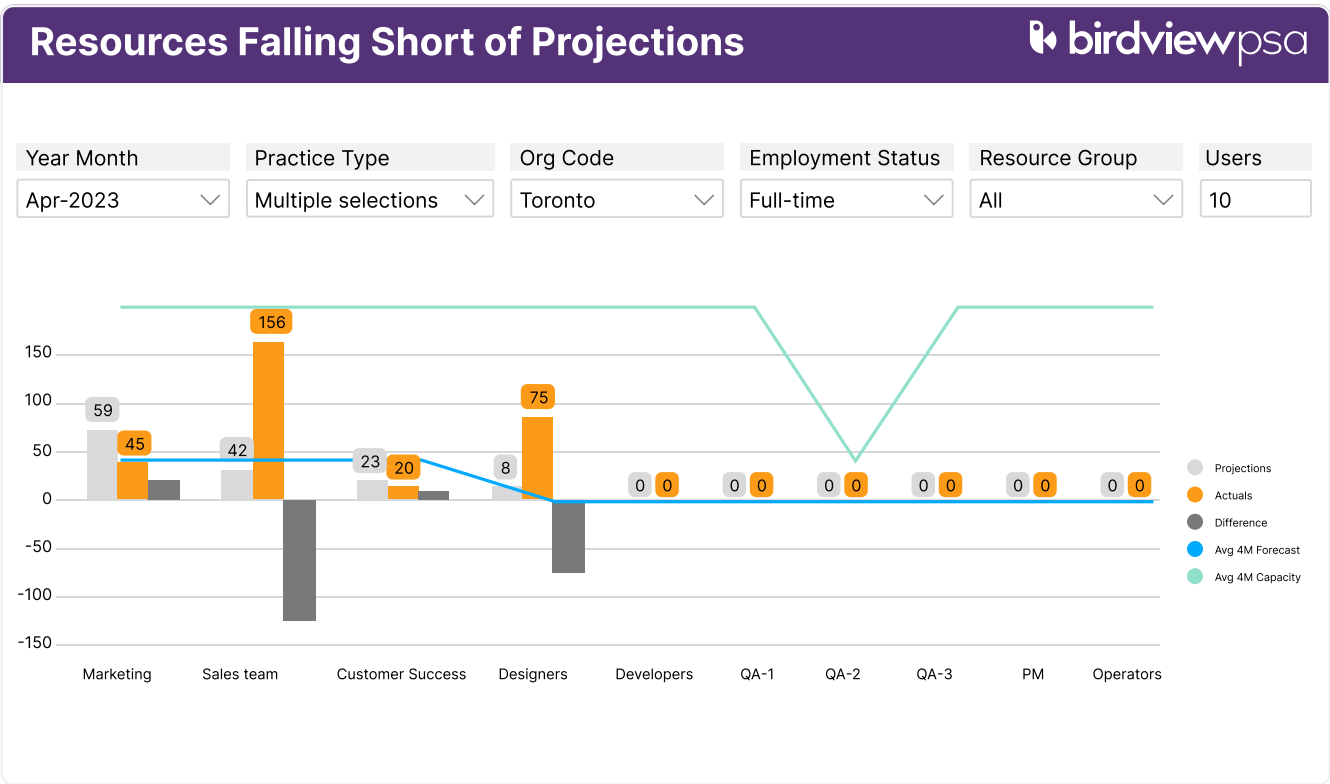
Each service-oriented company requires the ability to understand how will their initial projectections match actual numbers.

**Resources Falling Short Report** is a useful tool for managers to **evaluate actual workload and any deviations from earlier projections.**

The report **compares actual loading, projections, and capacity**, enabling managers to see in advance whether the current planning approach is viable.

It also highlights the areas where planning has led to the greatest errors and requires a modified approach. Conversely, if the difference between projected and actual load is minimal, this report can serve as a benchmark for the accuracy of projections in resource loading.

Additional filters can enhance the usefulness of the report as they allow the data to be narrowed down or summarized to the required granularity.

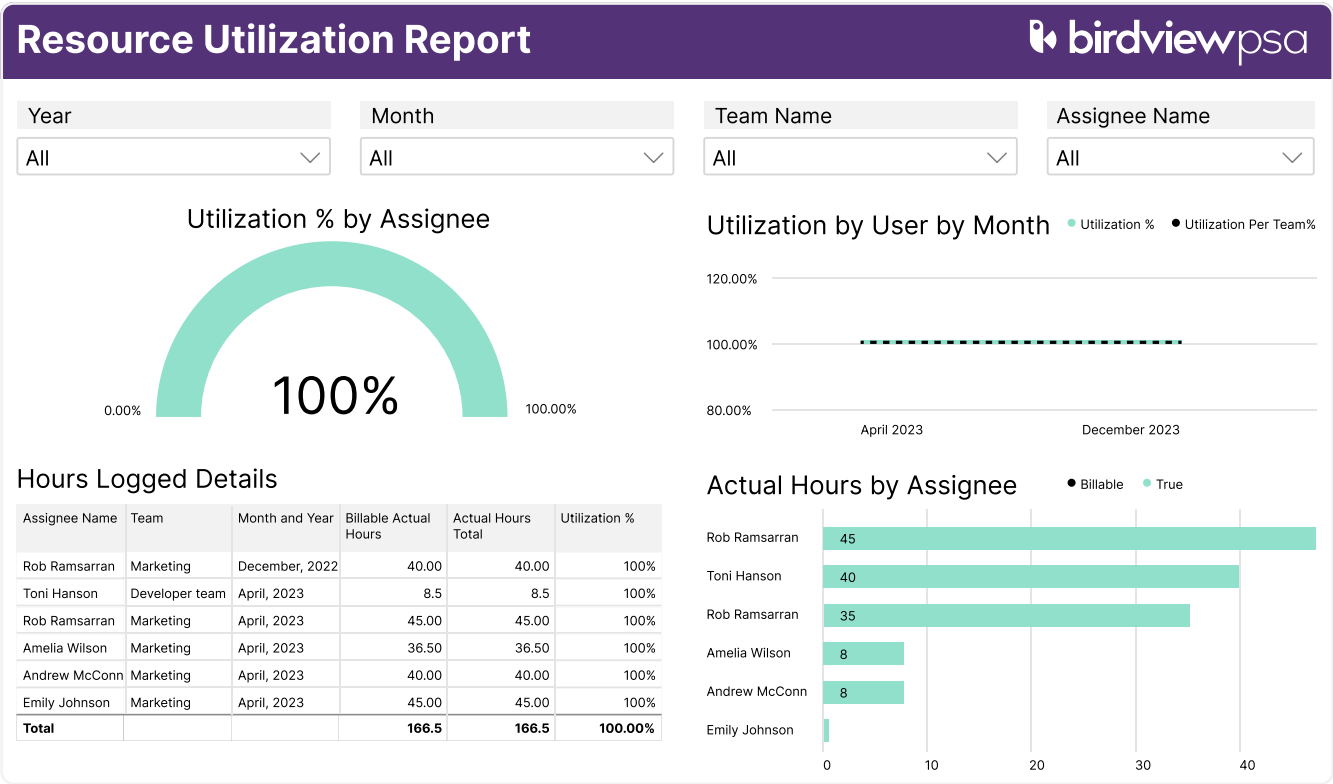


# Resource Utilization

The **Resource Utilization Report** allows managers to **see an overall picture of workload distribution by employees or teams over a period of time.**

By comparing total available billable hours with the total actual hours entered in the period, the manager can quickly understand if there is a billing issue.

By acting quickly, the manager will be able to take corrective actions and make sure that the company’s bottom line and profit margins match the target.



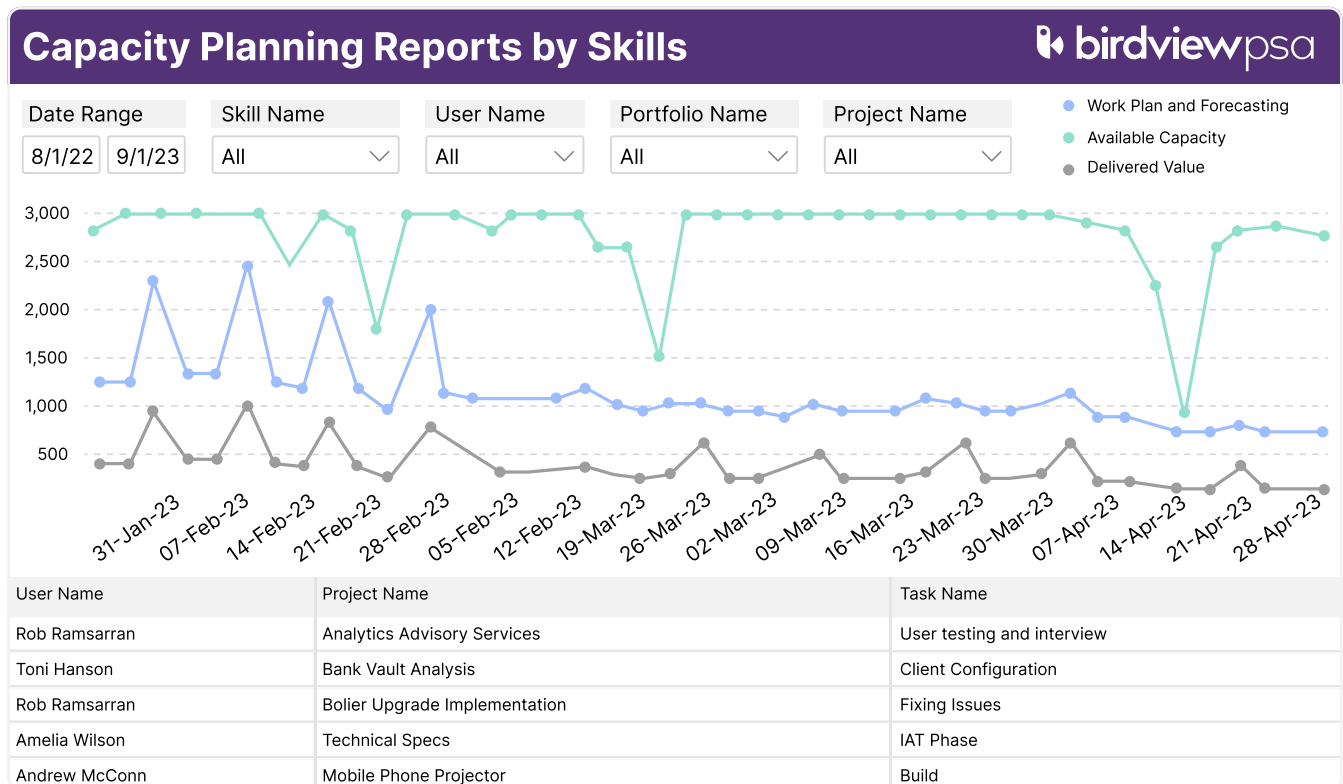
# Resource Capacity Planning

A **daily resource capacity planning report** provides an overview of the current capacity of an organization's resources. It includes information on how these resources are being utilized and to what extent they are meeting the organization's goals and objectives.

The report typically includes data on resource capacity and utilization over a period of time, such as a day, week, or month.

It allows managers to quickly assess how well their current plan is covering resource capacity and whether it is aligned with their expected results.

Any deviations from the plan can be highlighted in the report and can serve as a basis for making new managerial decisions related to staffing, resource allocation, or work-hour redistribution.



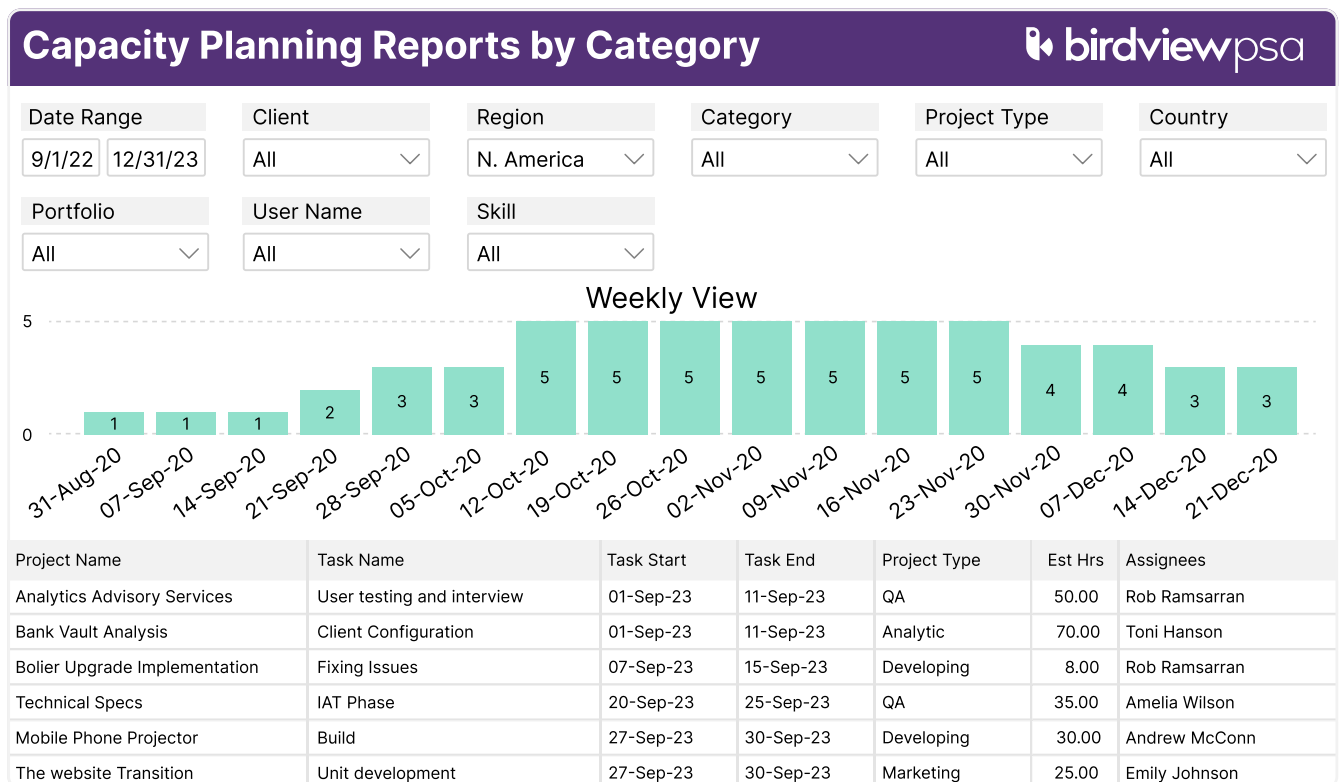
# Resource Capacity Planning by Category

**Resource capacity planning report** can be important not only user-, team-, or project-wise. Any custom category used in the company can act as a filter to pull data of the required nature.

The manager can make use of reports covering **resource loading in terms of portfolio, country, customer, project type, geographic region or any other custom parameter.**

A category-specific report allows viewing an accurate picture of planning within a select segment, without any risk of overlooking this information in large-scale summary reports.

Having obtained a clear picture of projected resource loading with the help of a relevant filter, the manager can quickly **determine whether the projected loading is sufficient or otherwise, and take appropriate decisions.**



# Resource Loading Reports



# Resource Loading Reports

Resource loading reports are vital in project management, providing a detailed overview of resource allocation and utilization. They enable managers to identify bottlenecks, balance workload distribution, and optimize resource allocation.

Consequently, these reports play a key role in ensuring projects are delivered on time, within budget, and maintaining desired quality standards.

# Resource Loading Reports

## Resource Loading by Skill

The resource workload by skill report allows managers to **quickly evaluate the workload and availability of different skill sets on their team.**

This report provides a retrospective view of **how workload has been distributed by project skill-wise** and helps make informed strategic decisions on task redistribution, the need for new hires, staff cuts, etc.

If the report includes automatic **color coding**, it becomes much easier to use. The report allows the user to quickly identify successful or unsuccessful workload instances and identify trends over a specific date range without additional diagrams or tables.

By regularly checking the resource workload by skill report, the manager can easily identify bottlenecks when deciding which project to pursue and when.

Resource Loading Report by Skill						birdviewpsa		
Month and Year	Skill Name	User Name	Country	02-Nov-22	09-Nov-22	16-Nov-22	23-Nov-22	30-Nov-22
All	Project Management	Total		150.00	4,295.06	596.94	356.53	583.25
Skill Name		John Hamilton	Total	80.00	4,150.00	287.00	250.00	350.00
All			US	80.00	4,150.00	287.00	250.00	350.00
User Name	Business Development	Timothy Altman	Total	170.00	1,132.00	232.00	583.00	683.00
All			Canada	170.00	1,132.00	232.00	583.00	683.00
Project Status	Client Management	Lacey Hanson	Total	0.00	1,413.53	298.47	0.00	0.00
All			UK	0.00	1,413.53	298.47	0.00	0.00
Country	Data Analyst	Mathew Wagner	Total	0.00	1,468.00	0.00	0.00	0.00
All			Denmark	0.00	1,468.00	0.00	0.00	0.00
Project Name	Coordinator	Denise Morris	Total	186.00	1,413.53	298.47	0.00	0.00
All			Germany	186.00	1,413.53	298.47	0.00	0.00
Portfolio Name		Toni Felker	Total	80.00	4,150.00	287.00	250.00	186.00
All		US	80.00	4,150.00	287.00	250.00	186.00	
	Solution Architect	Total		120.00	5,395.06	298.47	753.00	353.00
		Jessica Smith	Total	1,300.00	4,150.00	298.47	580.00	580.00
			Canada	1,300.00	4,150.00	298.47	580.00	580.00

## Resource Loading by Team/Department

Every manager appreciates the importance of understanding their employees' workload. Is their time being used cost-effectively? How much time is available, or is there a need to solve a team overload problem?

A team or department resource loading report gives an **accurate picture of team loading versus capacity**. The Resource Loading by Team Report allows managers to:

- view and compare planned hours with actual hours,
- track the distribution of time among teams,
- make informed strategic decisions based on the report data.

The information capacity of the report can increase dramatically with **additional filters** that allow for extra fields, such as team name, supervisor, portfolio name, customer name, etc.

Resource Loading by Team/Department				birdviewpsa	
Month and Year	Employee	Enabled	Project Name		
April 2023	All	True	All		
Employee Department			Month and Year	April 2023	
All	Employee Department	Employee	Supervisor	Estimated Hours	Hours Logged
Title	Project Management	John Hamilton	Rob Ramsarran	115.78	55
All		Timothy Altman	Toni Hanson	128.50	125.50
Supervisor		Lacey Hanson	Rob Ramsarran	230.50	130.50
All	Business Development	Mathew Wagner	Rob Ramsarran	187.52	25.50
Time Approver		Denise Morris	Amelia Wilson	195.65	15.67
All	Client Management	Toni Felker	Amelia Wilson	127.45	108.35
Portfolio Name		Jessica Smith	Toni Hanson	230.35	50.35
All	Data Analyst	Nancy Johnson	Rob Ramsarran	84.55	74.42
Customer Name		Dustin Ursino	Amelia Wilson	95.65	95.65
All	Coordinator	Toni Felker	Amelia Wilson	156.35	75.30
		Nancy Smith	Toni Hanson	54.75	25.32
		Rodney Ramsarran	Rob Ramsarran	260.54	150.20




# Resource Loading and Capacity by User

Actual loading distribution versus capacity by the user is one of the most important reports for a resource manager. Understanding the workload of each and every resource is the underlying factor for teamwork optimization, the need for staff hires or cuts, or taking measures to avoid employee burnout.

The User Loading and Capacity Report offers **full visibility into the available/assigned hours ratio per user (coworker)**. The inclusion of metrics such as the annual target completion rate % makes this report an indispensable tool for any resource manager.

If the report includes **automatic color coding** functionality, report analysis and identification of strengths and bottlenecks can take less effort and time.

Resource Loading and Capacity by User. Example #1



Project

All

User

Team

Customer

Project Status

Project Manager

Direct Manager

Task Id

Legend for Planned Hours

< 93%

93% - 103%

103% - 107%

> 108%

2021

Jul

Aug

Sep

Oct

Nov

Dec

176.00

168.00

168.00

176.00

152.00

168.00

2022

Jan

Feb

Mar

Apr

May

Jun

160.00

160.00

184.00

176.00

168.00

176.00

2022

Team

User

Jul

Aug

Sep

Oct

Now

Dec

1. Operations

John Hamilton

7.50

5.00

15.25

6.50

2.10

3.15

Total

7.50

5.00

15.25

6.50

2.10

3.15

Julie Brooks

183.50

168.00

168.50

176.50

149.89

97.65

Timothy Altman

173.50

168.25

167.25

131.25

2.76

Lacey Hanson

176.00

168.00

168.00

176.00

123.32

184.52

Mathew Wagner

176.00

182.50

185.75

145.23

217.59

Denise Morris

179.50

178.75

186.50

177.50

192.07

210.78

Toni Felker

178.50

176.50

175.75

178.00

162.54

180.28

Ian Milberger

196.50

177.00

175.50

186.00

149.00

138.60

Total

1,087.00

1,212.50

1,224.00

1,211.00

924.81

1,029.42

2. Human Resource

Russell Ramirez

83.00

72.25

70.25

52.00

57.88

64.09

Gary Nguyen

72.00

67.50

61.00

13.50

28.78

13.82

Michael Cooper

53.00

69.25

55.50

68.50

26.59

11.98

Sharon Medley

96.00

60.75

49.50

63.73

82.41

90.13

Mario Richardson

97.50

83.25

67.75

55.00

66.14

66.56

Bob Kellerman

119.75

Team

User

Annual Target, %

1. Operations

John Hamilton

87.13 %

Julie Brooks

30.26 %

Timothy Altman

86.86 %

Lacey Hanson

102.32 %

Mathew Wagner

105.39 %

Denise Morris

97.47 %

Toni Felker

97.59 %

Ian Milberger

70.78 %

2. Human Resource

Russell Ramirez

32.49 %

Gary Nguyen

37.23 %

Michael Cooper

93.41 %

Sharon Medley

80.07 %

Mario Richardson

11.54 %

Bob Kellerman

73.77 %

Anna Scott

32.14 %

Sean Pollack

104.61 %

Carmen Garnett

64.06 %

The report will help a manager quickly estimate the workload and availability of each coworker and make informed decisions on resource loading/availability, loading decrease/increase, reallocation to other projects, etc.

## Resource Loading and Capacity by User. Example #2

Date Range

Team

User Name

Project Name

Project Status

N... ▾

4

Months ▾

All ▾

All ▾

All ▾

All ▾

📅 11/6/2021 - 3/5/2022

	Year and Month	Nov 2021			Dec 2021			Jan 2022	
Team Name	User Name	Assigned Hrs	Capacity	Loading, %	Assigned Hrs	Capacity	Loading, %	Assigned Hrs	Capacity
1. Operations	Carmen Garnett	93.20	127.50	73.10 %	16.30	157.50	103.35 %	0.00	142.50
	Timothy Altman	28.00	127.50	21.96 %	0.00	157.50	0.00 %	0.00	142.50
	Julie Brooks	73.97	127.50	58.02 %	31.22	157.50	19.82 %	24.57	142.50
	Timothy Altman	52.50	127.50	41.18 %	0.00	157.50	0.00 %	0.00	142.50
	Lacey Hanson	4.00	127.50	3.14 %	0.00	157.50			142.50
	Mathew Wagner	106.50	127.50	83.53 %	55.00	157.50	35.52 %	43.65	142.50
	Denise Morris	23.11	127.50	18.13 %		157.50	0.00 %	0.00	142.50
2. Accounting	Toni Felker	509.50	127.50	399.61 %	509.50	157.50	34.92 %	28.68	142.50
	Ian Milberger	40.15	127.50	31.49 %		157.50			142.50
	Amelia Wilson	0.00	127.50	0.00 %	0.00	157.50	0.00 %		142.50
	Russell Ramirez	213.61	127.50	18.02 %		157.50			142.50
	Gary Nguyen	147.26	127.50	10.35 %	16.3	157.50	10.35 %	0.00	142.50
	Michael Cooper	0.00	127.50	231.01 %	180.53	157.50	114.62 %	6.43	142.50
	Sharon Medley	0.00	127.50	21.57 %	0.00	157.50	0.00 %	0.00	142.50
	Mario Richardson	24.00	127.50	0.00 %	0.00	157.50	0.00 %	0.00	142.50
	Bob Kellerman	13.20	127.50	167.54 %	21.94	157.50	13.93 %	3.95	142.50
	Ian Milberger	294.54	127.50	115.50 %	175.74	157.50	111.58 %	0.00	142.50
	Barry Hankins	27.50	127.50	518.87 %	249.60	157.50	158.48 %	162.10	142.50
	Mario Richardson	24.00	127.50	0.00 %	0.00	157.50	0.00 %	0.00	142.50
	Jon Kellerman	13.20	127.50	168.54 %	23.95	157.50	12.96 %	3.95	142.50

# Resource Loading and Capacity by Department / Practice

The Resource Loading and Capacity Report provides a **top-level view of actual hours vs capacity**, enabling managers to **identify underloaded and overloaded areas in the company**. With this information, managers can make strategic decisions.

**Color coding** is a highly valuable optional feature that allows managers to quickly assess the report values without having to examine detailed figures. In addition to the loading and capacity report, managers can benefit from reports that reflect various KPIs.

For example, a KPI report could include totals or average values for various criteria used by the manager and show the degree to which the total values from the loading and capacity report correspond to chosen targets.

Resource Loading and Capacity by Department or Practice Type

Date Range

N... ▾

4

Months ▾

Practice Type

Multiple selectio... ▾

User Name

All ▾

Project Name

All ▾

Project Status

All ▾

📅 11/10/2021 - 3/9/2022

Year and Month	Nov 2021			Dec 2021			Jan 2022		
Practice Type	Assigned Hrs	Capacity	Loading, %	Assigned Hrs	Capacity	Loading, %	Assigned Hrs	Capacity	Loading, %
Management	3,251.50	1,768.00	208.10 %	1,160.30	1,157.50	103.00 %	1,150.00	1,042.50	101.35 %
Ops Plan	4,944.39	2,704.00	201.96 %	793.00	3,025.55	0.00 %	3,750.00	2,130.65	207.00 %
Optimization		520.00	115.02 %	3,251.22	2,363.11	19.82 %	2,204.57	1,142.50	190.82 %
Revenue Systems	2,332.96	2,288.00	215.18 %		3,157.50	211.00 %	2,586.00	2,152.50	150.00 %
IT Operations	3,254.00	2,352.50	113.14 %	0.00	1,157.63		1,250.00	142.50	105.14 %
Data Engineering		520.00		550.00	2,057.50	107.35 %	2,043.65	1,542.50	35.52 %
DevOps	2,003.11	1,158.50	180.13 %	2,030.11	1,056.50	0.00 %	3,150.00	827.50	101.00 %
Research	2,513.61	3,127.50	190.02 %		3,155.50	18.02 %		1,042.50	
Total	18,299.57	127.50	1,223.55 %	7,784.63	17,130.79	459.19 %	16,134.22	10,023.15	890.83 %

KPIs

Year and Month	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022
Avg Loading,%	222.43%	58.35%	53.76%	52.98%	60.02%
Target,%	91.00%	50.00%	28.00%	0.00%	0.00%
Teams that need work < 80%	0	2	2	2	2
Teams that are overloaded > 100%	3	0	0	0	1
BD Aggression Recommendation	Low	Medium	Medium	Medium	Medium

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