

Module 2 – Strategy and design based on a solution design reference (SDR): Expert Developer Exam Toolkit

Section 2.1 Manage resources

This module contains the following subsections:

Section 2.1.1 Resource Management

Resource Management empowers resource managers to make critical business decisions that prioritize the most important work based on available individual workers.

While the process starts at the job role level, Resource Management ultimately focuses on individual users, their actual work assignments, and managing under-utilization or over-commitment.

Resource Management allows you to configure your system to accurately forecast the use of your resources based on their availability so that the work that must be done is completed on time and on budget.

Overview of Resource Management in Adobe Workfront

Resource Management refers to all the activities performed by the Adobe Workfront administrator, the resource manager, and the Project Owner to plan (Resource or Scenario Planning) and schedule (Workload Balancer) an organization's resources and assign them to the work that needs to be done, taking into account their availability. Additionally, resource management also refers to viewing information about the planned and actual resource allocations in a report view (Utilization report).

Workfront has several sets of tools used to manage resources. Each tool has an individual scope. Currently, you can use the following Resource Management tools in Workfront, depending on which stage of resource management you are in:

- To plan how resources are allocated at a higher level, before the actual work on projects begins, use the following tools:
 - **The Resource Planner:** You can use the Resource Planner in the first stage of resource management to budget project time for your resources according to their scheduled availability. During the planning of resources phase, you can organize users in resource pools and assign multiple resource pools to a project.

For more information about Resource Planning, see the section [Resource Planning in Adobe Workfront](#).

- **The Scenario Planner:** This is a higher-level planning of resources that allows you to manage them across multiple initiatives that can span over a one, three, or five year plan and include multiple projects. You can use the best scenario for making the most out of their availability and your budget.

The Scenario Planner requires a separate license, in addition to the Workfront license. For information about the Workfront Scenario Planner, see [The Scenario Planner overview](#).

- To schedule or assign resources to actual work (tasks and issues), use the following tool:
 - **The Workload Balancer:** This belongs to a lower-level stage of resource management, where you can assign your resources to the actual work (tasks and issues) that they must complete, based on the amount of hours needed to complete them and their availability. Using the Workload Balancer you can assign users to actual work that is currently unassigned or assigned to job roles.

For information about the Workfront Balancer, see the section [The Workload Balancer](#).

- To analyze budgeted, planned, and actual allocations across multiple projects, use the following tool:
 - **Utilization Report:** Use this report to view the utilization of resources for projects. You can compare budgeted, planned, and actual allocations for your projects and their impact on the cost and revenue of the projects.

For information about the Utilization Report, see [View resource utilization information](#).

The components of the Resource Management process

NOTE

Resource Management is never a stagnant process in Workfront. As the schedules of your projects, the availability of your users, or their roles change, you must continually adjust the information about your resources, their assignments, and their allocations to projects, tasks, and issues.

The process of managing resources in Workfront includes the following stages:

- **Configuration:** As a system administrator, resource manager, or Project Owner you must configure certain fields and objects in your Workfront instance before managing your resources. For more information about the prerequisites necessary to start managing resources in Workfront, see the [Prerequisites for accurate resource management](#) section in this article.

In addition to having projects with work items, you must configure the following items in Workfront:

- Users
For more information about creating users, see the article [Add users](#).
- Job Roles
For more information about creating job roles, see the article [Create and manage job roles](#).
- Schedules
For more information about creating schedules, see the article [Create a schedule](#).
- Project Preferences

TIP: Only a system or group administrator can modify Project Preferences for your system or for your group.

For more information about defining Project Preferences, see the article [Configure system-wide project preferences](#).

- Resource Pools

For more information about creating resource pools, see [Create resource pools](#).

- Resource Management preferences

As a system, you must decide how Workfront calculates user availability at the system level, whether using the user's schedule or the Default Schedule of your system.

For more information, see [Configure Resource Management preferences](#).

- **Resource allocation:** As a resource manager, or a Project Owner, you can define allocation of resources for your projects as well as assign work. For this step, you can manage the estimate the allocation of your resources using the Resource Planner or the Scenario Planner, and assign actual work to users in the Workload Balancer.

For more information about resource planning and assigning work, see the following sections:

- [Resource Planning in Adobe Workfront](#)
- [Adobe Workfront Scenario Planner](#)

- [The Workload Balancer](#)
- **Analysis:** As a resource manager, Project Owner, or people manager, review the Utilization Report to understand how the budgeted and planned allocations of your resources compare to the actual ones. Review information by hours, cost, or revenue. For information about the Utilization report, see [View resource utilization information](#).

Access needed to view and manage resources using the Resource Management tools in Workfront

The following users have access to the Resource Management tools in Workfront:

You must be one of the following users and have the following access and permissions to access resource management tools:

- The system administrator.
- A user with a Plan license.

A user with a Work license can use the Workload Balancer of a project and manage assignments and allocations.

In addition to having a Work or higher license, you must have the following to use specific resource management tools:

- Edit access to Resource Management (not needed for making assignments in the Workload Balancer)
- Edit access to Financial Data to display Cost information in the Resource Planner
- View access to Financial Data to view Cost and Revenue information in the Utilization Report (only users with a Plan license)
- Contribute or higher permissions that includes Make Assignments on the projects you want to manage resources for.

For information about the access needed to budget resources, see the article [Access needed to budget resources](#).

For information about the access needed to manage resources in the Workload Balancer, see [Access needed to manage resources in the Workload Balancer](#).

Prerequisites for accurate resource management

You must meet a set of requirements before you can efficiently use the resource management tools in Workfront.

For information about what the requirements are for each resource management tool in Workfront see the following:

- The section “Prerequisites for working in the Resource Planner” in the article [Resource Planner overview](#).
- The section “Best practices for using the Workload Balancer” in the article [Overview of the Workload Balancer](#).
- [Access needed to budget resources in Adobe Workfront](#).
- [Access needed to manage resources in the Workload Balancer](#).

Section 2.1.2 Resource Planning in Adobe Workfront

The articles in this section provide valuable insights into the functionality available in the Planner and Resource Pools sections of Adobe Workfront's Resourcing area.

This section includes the following articles:

- [Get started with Resource Planning](#)
- [Access needed to budget resources in Adobe Workfront](#)
- [Resource Pools](#)
- [Resource Planner overview](#)
- [Locate the Resource Planner](#)
- [Resource Planner navigation overview](#)
- [Review resource availability and allocation using the Adobe Workfront Resource Planner](#)
- [Overview of hours, FTE, and cost information in the Project and Role views of the Resource Planner](#)
- [Budget resources in the Resource Planner using the Project and Role views](#)
- [Adjust budgeting dates in the Resource Planner](#)
- [View Available, Planned, and Actual Hours or FTE in the Resource Planner when using the User view](#)
- [Overview of calculating hours and FTE for users and roles in the Resource Planner](#)
- [Calculate costs in the Resource Planner](#)
- [Prioritize projects in the Resource Planner](#)
- [Share the Resource Planner user view with a link](#)
- [Filter information in the Resource Planner](#)
- [Export information from the Resource Planner](#)
- [Report on Resource Planner Budgeted Hours](#)
- [Resource Planner display limitations](#)

Section 2.1.3 Resource Utilization

This section contains the following article:

- [View resource utilization information](#)

Section 2.1.4 The Workload Balancer

To learn about the Workload Balancer, its navigation, and how to efficiently assign work using this tool, refer to the following articles:

- [Overview of the Workload Balancer](#)
- [Access needed to manage resources in the Workload Balancer](#)
- [Locate the Workload Balancer](#)
- [Navigate the Workload Balancer](#)
- [Filter information in the Workload Balancer](#)
- [Overview of assigning work in the Workload Balancer](#)
- [Assign work manually using the Workload Balancer](#)
- [Assign work in the Workload Balancer by dragging and dropping](#)
- [Assign work in bulk using the Workload Balancer](#)
- [Unassign work in the Workload Balancer](#)
- [Manage user allocations in the Workload Balancer](#)
- [Share the Workload Balancer with a link](#)
- [Update work items in the Workload Balancer using the Summary](#)

Section 2. 2 Adobe Analytics Documentation

Here, you will discover a wealth of resources, self-help guides, and customer support for a diverse range of reporting tools, including Analysis Workspace, Report Builder, Reporting API, Data Workbench, and Activity Map.

Additionally, you can access comprehensive documentation covering product and user administration, implementation guides, and all the features supported in Adobe Analytics. Whether you're a newcomer seeking to get started or a seasoned user aiming to explore advanced capabilities, our Adobe Analytics documentation offers everything you need to unlock the full potential of this industry-leading solution. Start exploring today!

Additional Resources:

[Analytics Tools](#) : Learn how to use Analytics tools, including Analysis Workspace, Analytics Dashboards, Report Builder, and Activity Map.

[Administration](#) : Learn about Analytics administration tasks, such as managing users and products in the Experience Cloud Admin Console, configuring report suites, and more.

[Implementation](#) : Learn ways to implement Adobe Analytics. Customize what data is collected to get the most out of Analytics data. **IMPORTANT**

- [Implementation Basics](#)
 - [First-time Implementation](#)
 - [Understanding and Creating Report Suites](#)
 - [Map contextData Variables into Props and Evars with Processing Rules](#)
 - [How to Identify Your Analytics Tracking Server and Report Suites](#)
 - [Creating a Business Requirements Document](#)
 - [Creating and Maintaining an SDR](#)
 - [Using a Data Layer on your Site](#)
- [Via Experience Platform Launch](#) **VERY IMPORTANT**
 - [Implementing the Experience Cloud in Websites with Experience Platform Launch](#)
 - [Basic Configuration of the Analytics Launch extension](#)
 - [Configuring Library Management for Analytics](#)
 - [Configuring General Settings in the Launch Analytics Extension](#)
 - [Configuring Global Variables in the Launch Analytics Extension](#)
 - [Configuring Cookie Settings in the Launch Analytics Extension](#)
 - [Using Custom Code while Configuring the Launch Analytics Extension](#)
 - [Using a Data Layer to set Page Name and Other Variables via Launch](#)
 - [Adding Implementation Plug-ins in Launch](#)
 - [Use doPlugins in the Adobe Analytics Extension](#)
 - [Configuring Easy Download Link Tracking](#)
 - [Configuring Easy Exit Link Tracking](#)
 - [Preparing Experience Platform Launch for your Analytics Implementation](#)
 - [Creating Data Elements in Experience Platform Launch for the Analytics Implementation](#)
 - [Creating a Global Page Rule in Experience Platform Launch](#)
 - [Validating your Global Page Load Rule in Experience Platform Launch](#)
 - [Creating Experience Platform Launch Rules for Special Pages](#)
 - [Creating Experience Platform Launch Rules for Success Events](#)
 - [Publishing Experience Platform Launch Libraries to Stage and Production](#)
- [Using JavaScript](#)
 - [Custom Link Tracking without a Tag Manager](#)
 - [Updating AppMeasurement When Not Using Experience Platform Launch](#)
- [Validating and Troubleshooting](#)
 - [Inspecting Implementations with the Adobe Experience Cloud Debugger](#)
- [SPA Pages](#)
 - [Using best practices when tracking SPA](#)

[Components](#)

Manage data using components like Segments, Calculated Metrics, Virtual Report Suites, Marketing Channels, and Classifications. Learn about Cross-Device Analytics.

[Export](#)

Learn about using Data Feeds to export of raw data, and Data Warehouse to retrieve a spreadsheet output of data. Learn how to use FTP and SFTP to transfer files.

[Import](#)

Bring data into Adobe Analytics from outside sources, either in bulk or real-time.

[Integration](#)

Configure integrations with other Adobe Experience Cloud solutions, such as Audience Manager and Advertising Cloud.

[Tech Notes](#)

Browse a knowledge base containing helpful articles that don't belong to a specific Analytics tool or component.

[Media Analytics](#)

Implement Adobe Analytics for Streaming Media. Includes the Media SDK and the Media Collection API.

[Data Workbench](#)

Learn about the multi-channel capabilities of Data Workbench. Includes Data Workbench Client, Installation, Dataset Configuration guides, and more.

[Customer Journey Analytics](#)

Learn about Adobe Customer Journey Analytics and how to use Analysis Workspace with data from Experience Platform.