Resource Planner Function and how to plan and schedule workers tasks and activities.

If you are a manager, coordinator, supervisor, or a member of the management committee and are required to create activities for other workers, you will be required after creating and adding the work item, task or activity to use the resource planner function to allow the system to plan the workers daily, weekly or month schedule.

To plan the calculation of the workers' work follow these steps.

1. Make sure you have follow the steps in how to create an activity.Â If you have not created a task or work activity click here for how to do it.
2. Make sure you have assigned the right worker and have assigned the best estimated assigned hours of work.Â Without the assigned hours of work, the planning for the worker's schedule may fail. To assign the hours for the assigned work refer the FAQ procedure of How to add resources (staff/contractors) and assign or allocate hours to an activity using the Assignment function.

Begin the Planning Calculation for the Worker's Schedule:

To use the Resource Planner feature you must be a manager or department or channel supervisor with planning permission rights.Â If the work is saying they are not able to see their work, activities or task items in the resource planner it is possible you did not create the activity correctly or skipped steps 1 and/or 2 above. Speak with your manager or department or channel supervisor for them to assist first before requesting assistance from Support.

1. Press the Resource Planning button / menu.

2. Select the resource (this would be the name of the worker you are about to calculate and schedule their planning work.)
    1. For managers, supervisors and management staff you can view all permitted resource names.
3. Select the scale you wish to view = day, week, month, quarter.

4. Enter the display from date from the date you want to see the work.

5. Leave the Display to empty, unless you only want to see a specific period.

6. Check the project level checkbox.

7. Check the left work checkbox.

8. optional Check the wbs checkbox.

9. ProjeQtor will display the activities in the order that they are to be completed.Â Unfortunately you will have to scroll up and down to see the planning order as there is not

© 2026 Nikolas Harrington <support@iconic.productions> | 18-Nov-2026 09:03

sorting functionality in this feature.Â Projeqtor uses an algorithm that plans the activities based on the validated dates you provided, assignment hours, the priority level and activity type as well as the planning status.Â You no longer have to guess.Â Keep in mind a priority activity may come in with the utmost of importance, rare but you know it happens.Â If this happens the planning changes to reassign the activities in order.Â This is why it is very important to have properly created the worker's activity and the work correctly used the change of status correctly and the worker uses real-time allocation hours correctly.Â It is important or the worker can find themselves falling behind or not have their work plan schedule correctly and on time.

10. Check theÂ **save datesÂ** checkbox.

    this is important if you want the dates saved and recorded when planning.
11. Press the **Cog Wheel Calculation** button.

12. In **Planning calculation for project Window** select the Project Name that you want to plan for the specific resource (i.e. a worker).Â If the resource is working in multiple project select all the project you want to plan or replan their schedule.Â You will need to scroll up or down to find the project.
13. Select the start date.
    1. The start date you choose here will calculate the workers' work from this date.Â If they have overdue activities, it will be replanned and will display the planning dates in red indicating they are overdue.Â It is best to inform the worker those particular activities are overdue/late.
14. Press theÂ **OKÂ** button to begin the calculation planning.
15. Wait until the planning is completed.Â It can take up to 30 seconds.
16. optional Check the work of the workers is on the datesÂ you want.Â If not you can edit the planning status and priority and requested and validated dates and re-plan the activities until you are satified with the workers planned schedule of work to be carried out.
17. optional You can view the activities and how they display in the workers diary.Â To view a diary of your own or another worker click here for instructions.

WHEN LOOKING AT THE RESOURCE PLANNING LAYOUT this is what each item means.

- ... **Green boxes** mean you are working on schedule based on your validated times and dates and estimated hours.

- ... **Red boxes** mean you may fall behind on the planning based on your estimated work hours and validated start and end dates.Â This is only an estimation that the system is constantly checking and replanning.Â You do not have to plan it, you have to watch and check it regularly.

- ... **A line in the middle of the green or red box** means you are working on the activity and shows the progress.Â If you do not use the real time hours allocation (the timesheet function feature) you will not see this line and you can fall further behind and become late in activity completion.

- You can still click on an activity displayed to view the details of the activity and work on the work, activity or task from the **Resource Planning Menu**.

1. Â

© 2026 Nikolas Harrington <support@iconic.productions> | 18-Nov-2026 09:03

Attached files:

Unique solution ID: #1532
Author: n/a
Last update: 27-Apr-2020 07:54

© 2026 Nikolas Harrington <support@iconic.productions> | 18-Nov-2026 09:03
: https://staff.iconic.productions/KB/content/0cat=68/533/en/resource-planner-function-and-how-to-plan-and-schedule-workers-tasks-and-activities.h