



itdesign

# itd Advanced Resource Planning

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# Your contact at itdesign



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# Resource Management

## Challenges

Strategic planning of resources according to the main strategy

Fast and flexible reaction to changes

Planning of crossfunctional, intercultural and interdisciplinary teams



Common planning base for project manager and resource manager

Avoid bottlenecks

Realistic and reliable overview

View all needed resources and their capacity at a glance

# Why itd Advanced Resource Plannig



Professional yet simple resource planning  
in Clarity PPM



Realistic and reliable planning leads to more  
motivated employees and acceptance

# Value proposition

Clarity PPM 15.7 handles basic allocation planning well  
and is a benefit for all users

**itd Advanced Resource Planning adds extra functionality  
and many useful features for professionals on top!**

# Benefits

## for Project Managers

- Edit resource assignments or allocations for multiple projects on one screen
- Drill down into phases and tasks and edit detailed task assignments
- Real time feedback – color highlighted
- Fast and efficient

## for Resource Managers

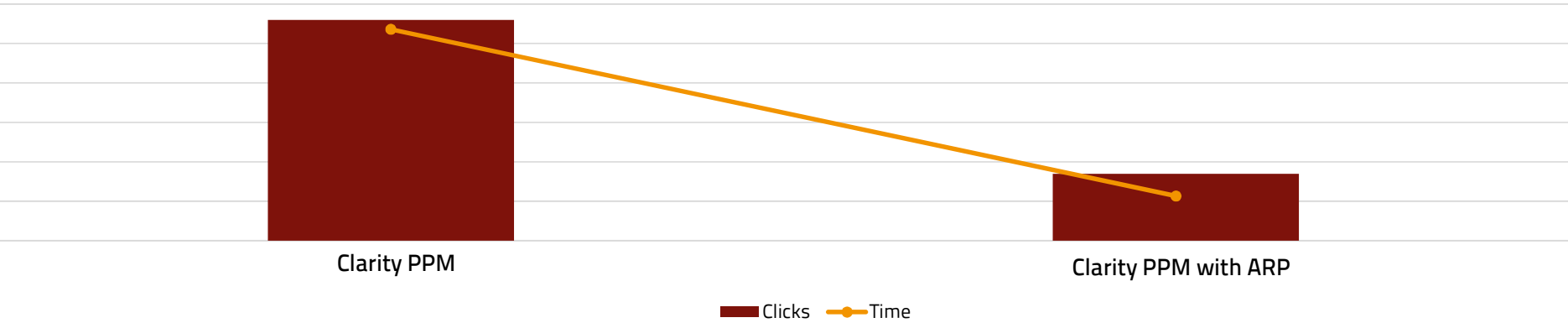
- See a resource's full workload across all investments on the same screen
- Pivot by resource or by project
- Edit ETC even for non-projects (other work, services, etc.)
- Works with large installations

# Time and click reductions

## SAMPLE USE-CASES

## TIME AND CLICK REDUCTIONS WITH ITD ADVANCED RESOURCE PLANNING

	CLICKS	TIME
Add a new resource to a task with 8 hrs ETC	55%	2.5x
Replace a resource on two tasks in one project	67%	2.0x
See an overload and reduce it on two tasks in two projects	75%	7.5x
TOTAL	70%	4.5x



# Clarity PPM 15.7 vs itd Advanced Resource Planning

Functional area	Use cases for project planning and resource management in Clarity PPM	Clarity PPM	itd ARP
Allocation Planning	Scenario support for "what if" analyses incl. instant feedback for resource utilization	No	Yes
	Drag & drop resources onto tasks / investments	No	Yes
	Quickly filter for appropriate resources when staffing roles (OBS, skills, roles..)	No	Yes
	Plan only with approved projects or also with non-approved projects incl. the effects on the resource utilization in both cases	No	Yes
	Grid editing of allocations, color indicators for capacity utilization	Only Allocations	Yes
Detailed planning on task level	Spread ETC over time and multiple resources	No	Yes
	View and aggregate all assignments by resource	No	Yes
	Project planning with dependencies, subprojects, auto-schedule etc. incl. real time effects on resource utilization	No	Yes
General, customizability	Display, filter and edit your selection of standard and custom fields	No	Yes
	Launch actions and processes from the context menu	No	Yes
	Plan in project days, hours or FTE	Only FTE & hours	Yes
	Excel export of all views	No	Yes
	One single point of truth to work in single as well as global mode	No	Yes



# Why itd Advanced Resource Planning

## Frequent demands and questions :



„But if a person is overloaded, shouldn't that be highlighted?“



„Can I hard book directly in Microsoft Project?“



„How can I see available capacity?“



„Is there a way to simulate resource loads?“



„Can I work in one screen to assign people to tasks on multiple projects?“

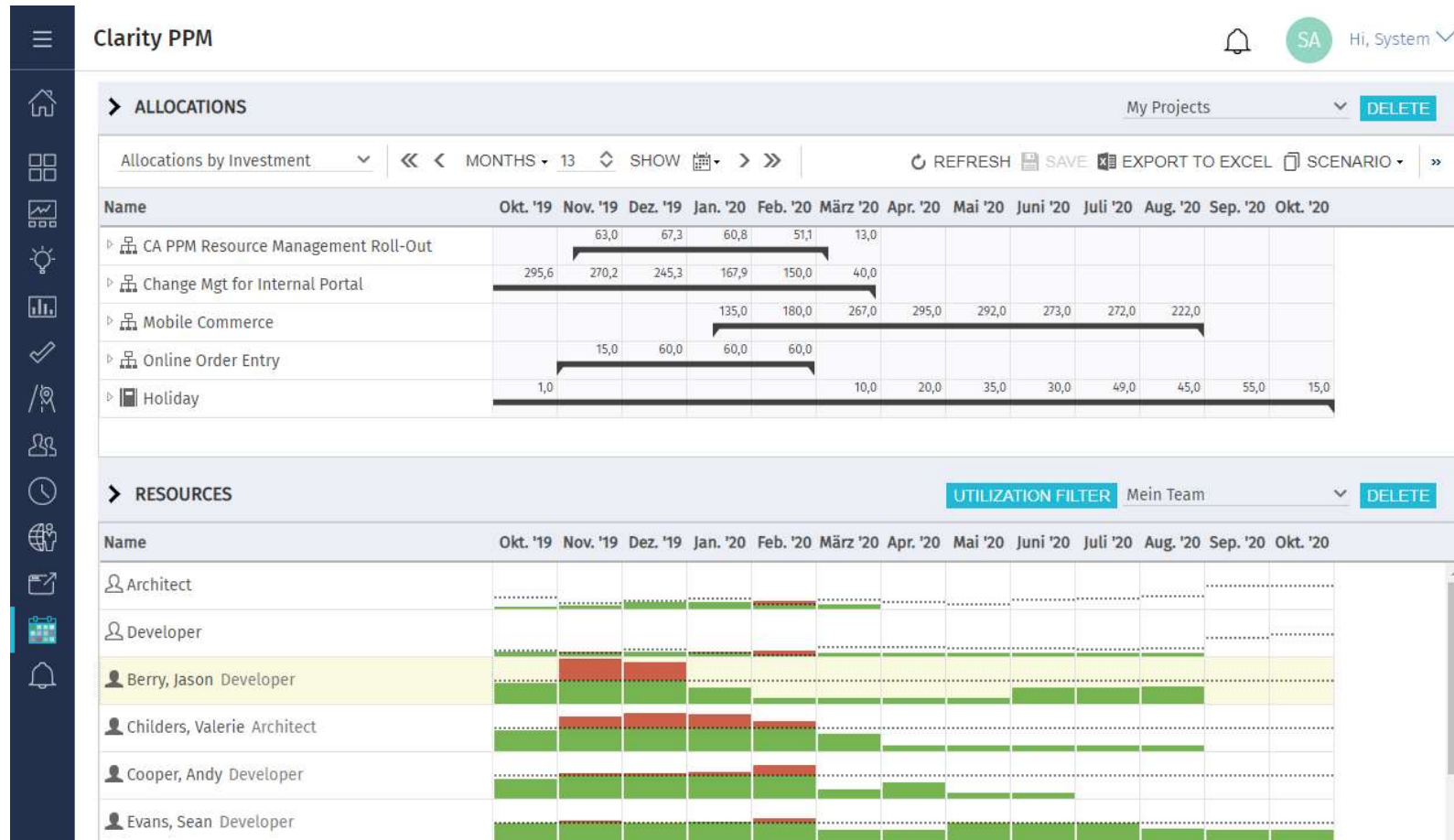


„Really? So many clicks to get the job done?“

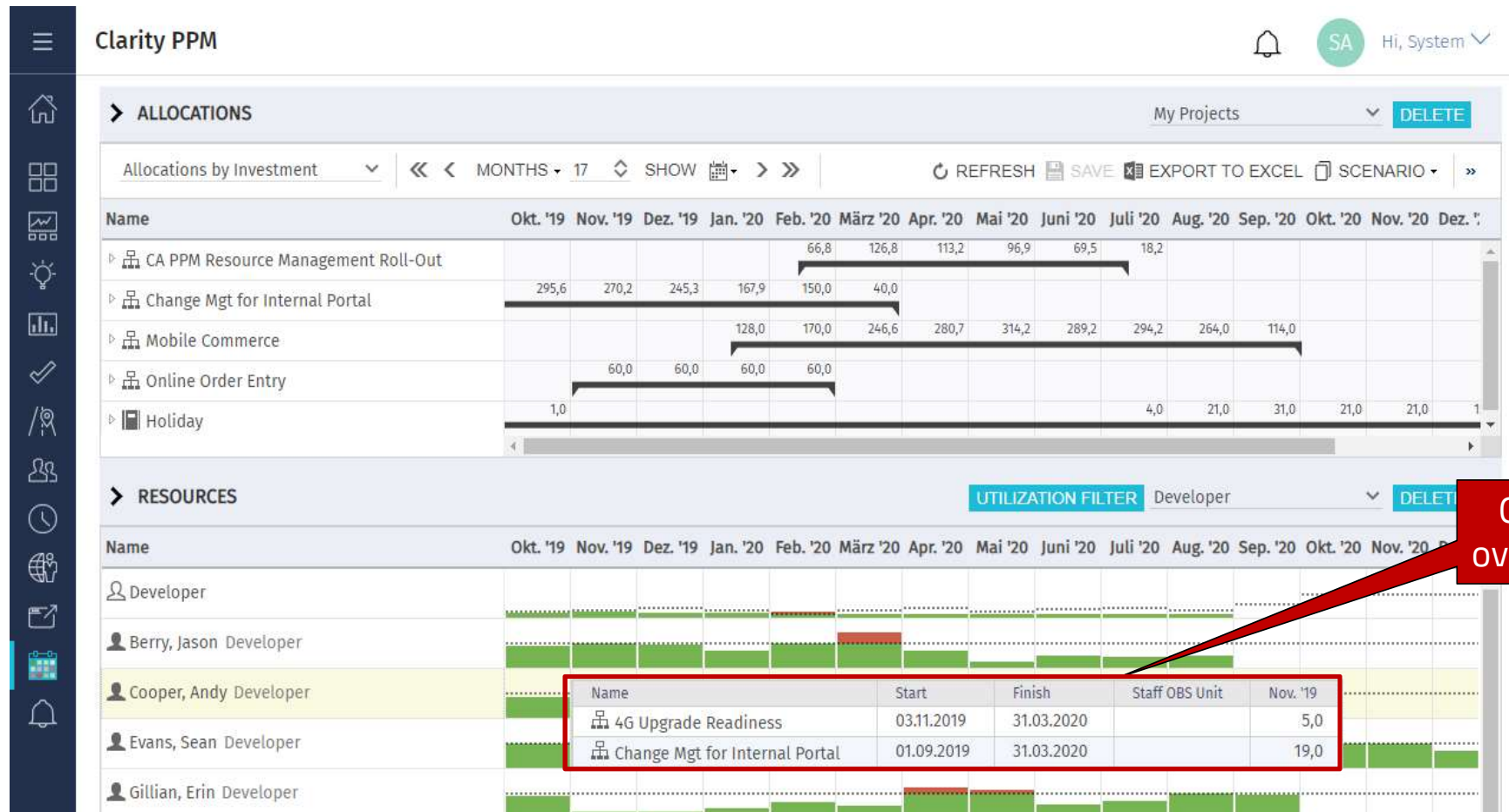


„Can I not see other projects on which my resources are planned on directly in Open Workbench?“

# Graphical display of bottlenecks



# Detailed overviews of resources



# Drag & Drop

Drag and Drop of allocations as well as resources and roles

The screenshot shows the Clarity PPM interface with the 'ALLOCATIONS' and 'RESOURCES' sections. The 'ALLOCATIONS' section displays a table with columns for months from Oct. '19 to Oct. '20. The 'RESOURCES' section displays a list of resources with their roles and allocation bars. A red box highlights a resource allocation for 'Developer' in the 'ALLOCATIONS' section, and another red box highlights a resource in the 'RESOURCES' section. A red arrow points from the resource in the 'RESOURCES' section to the allocation in the 'ALLOCATIONS' section, indicating a drag-and-drop action. The text 'Drag & drop' is written in red over the arrow.

**ALLOCATIONS**

Allocations by Investment

My Projects

DEVELOPER

Mobile Commerce

Online Order Entry

Developer

Madden, Tina

Preston, Sarah Developer

Holiday

**RESOURCES**

UTILIZATION FILTER

Mein Team

DEVELOPER

Architect

Developer

Berry, Jason Developer

Childers, Valerie Architect

Cooper, Andy Developer

Evans, Sean Developer

Gillian, Erin Developer

Work effort unit: Days | Planned Allocation

Displaying 1 - 8 of 21

# Custom actions

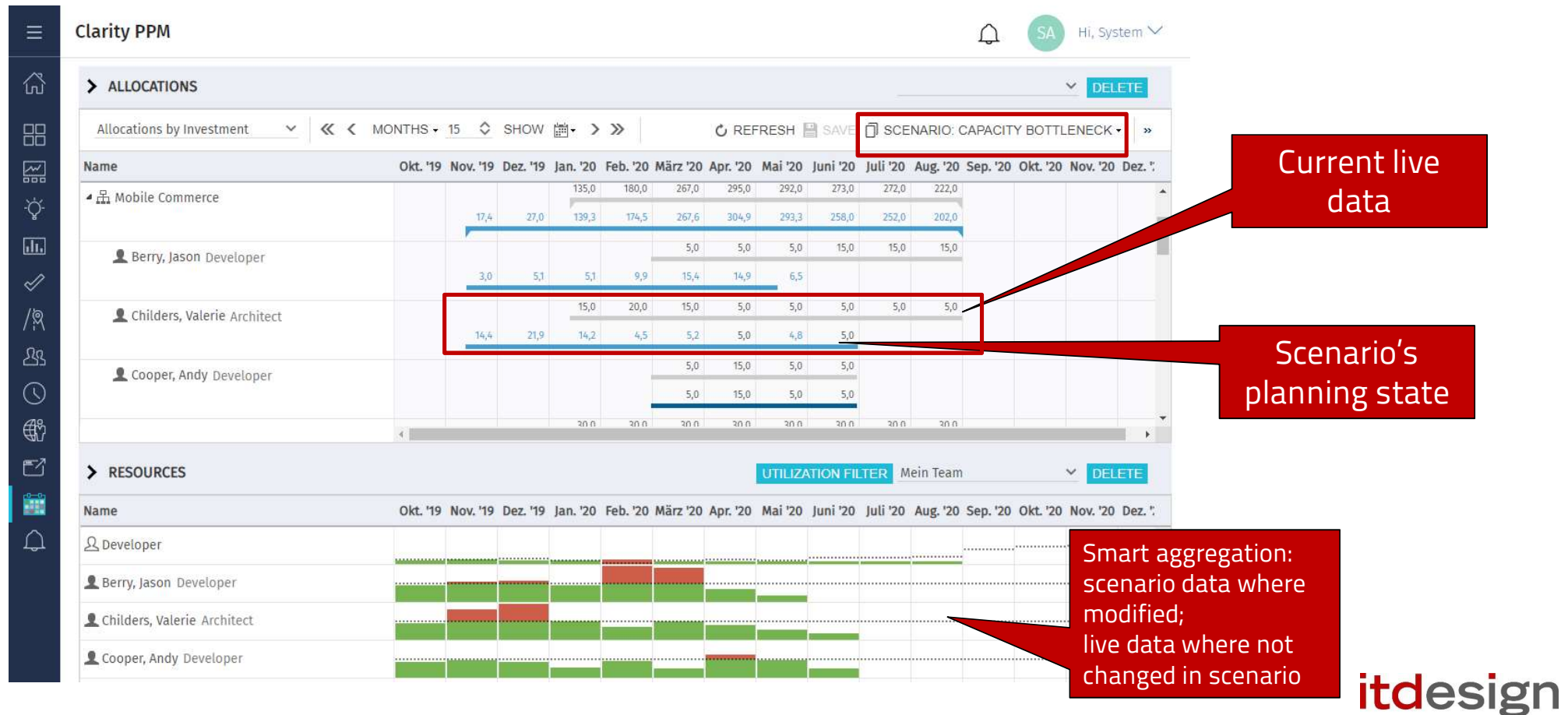
The screenshot displays the Clarity PPM interface. On the left is a dark sidebar with navigation icons. The main area is titled 'Clarity PPM' and contains a section for 'ALLOCATIONS'. Below this, there's a table with columns for months from Sep. '19 to Juni '20. A context menu is open over the 'Developer' role in the table. The menu items are: 'Open properties', 'Create Requisition', 'Allocate From Estimates', 'Commit Planned Allocation', 'Accept Hard Allocation', 'Delete', 'Filter for role, OBS and skills' (highlighted with a red box), 'itd Request Resource', 'itd Approve Request', and 'itd Propose Change'. Below the allocations table is a 'RESOURCES' section with a similar monthly breakdown for individual resources like 'Berry, Jason Developer' and 'Cooper, Andy Developer'.

Quick filter for matching resources.

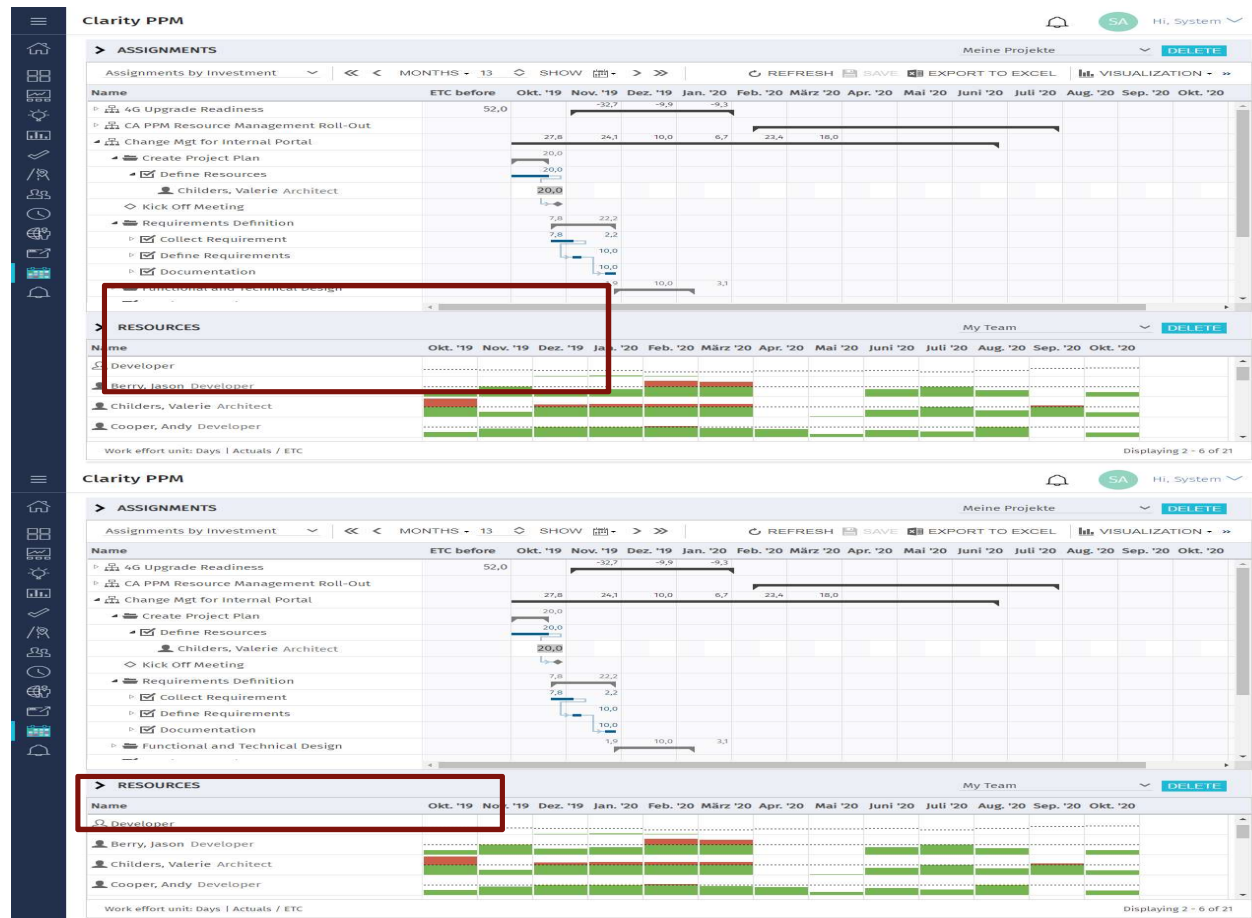
The selection of available actions on the context menu can be easily modified.

# Scenario mode for allocation planning

Perform "What if"-analyses within a scenario that is saved separate from your live data



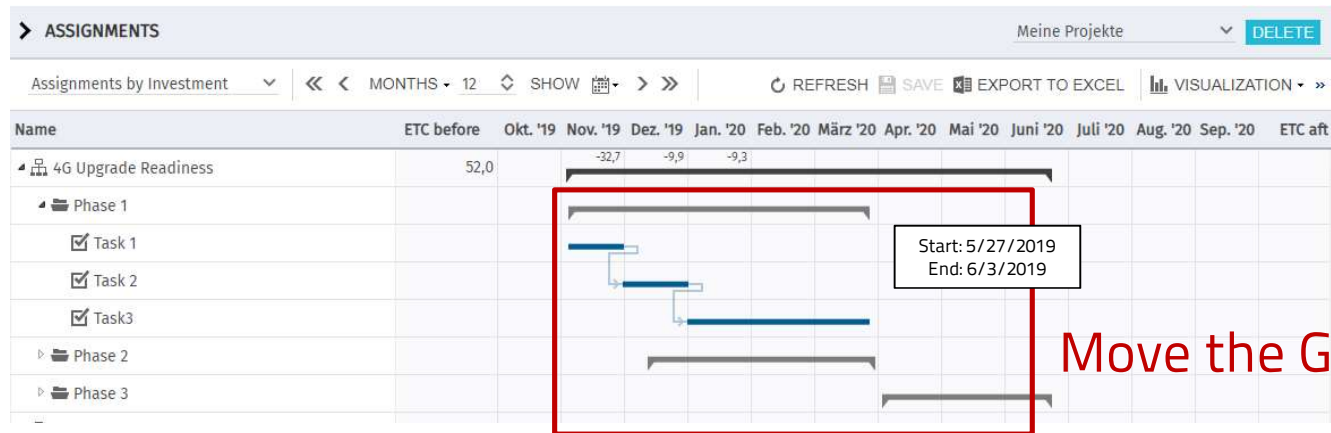
# ETCs can be planned on a detailed level



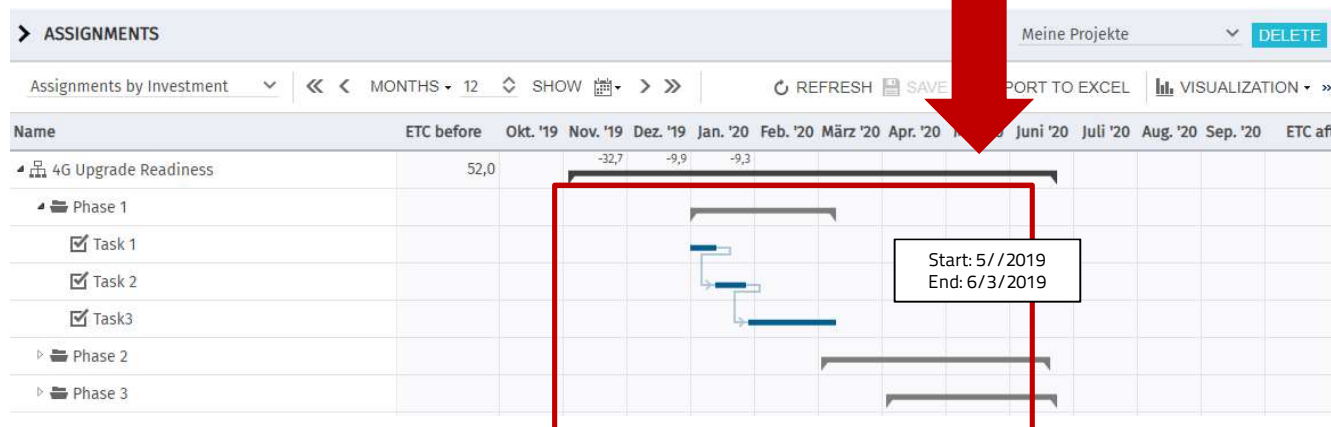
Instand feedback  
when editing  
assingments



# Tasks and phases can be moved or resized



Move the Gantt bar





# Filter options

**PREFERENCES**

< **YES** **VISIBLE COLUMNS** **FILTER - ALLOCATIONS** **FILTER - RESOURCES** **UTILIZATION** **LAYOUT** **SYSTEM**

**AVAILABLE FILTERS:**

- Investment - Hide investment
- Investment - Inactive Inves
- Investment - Investment ID
- Investment - Investment Na
- Investment - Investment OI
- Project - Project Templates
- Resource - Booking Manage
- Resource - Is External
- Resource - Resource Manag
- Resource - Resource Name
- Resource - Resource OBS U
- Resource - Role/Resource

**LEFT COLUMN:**

- Investment - Investments
- Investment - Investment Mana
- Investment - Investment Type
- Investment - Investment Statu

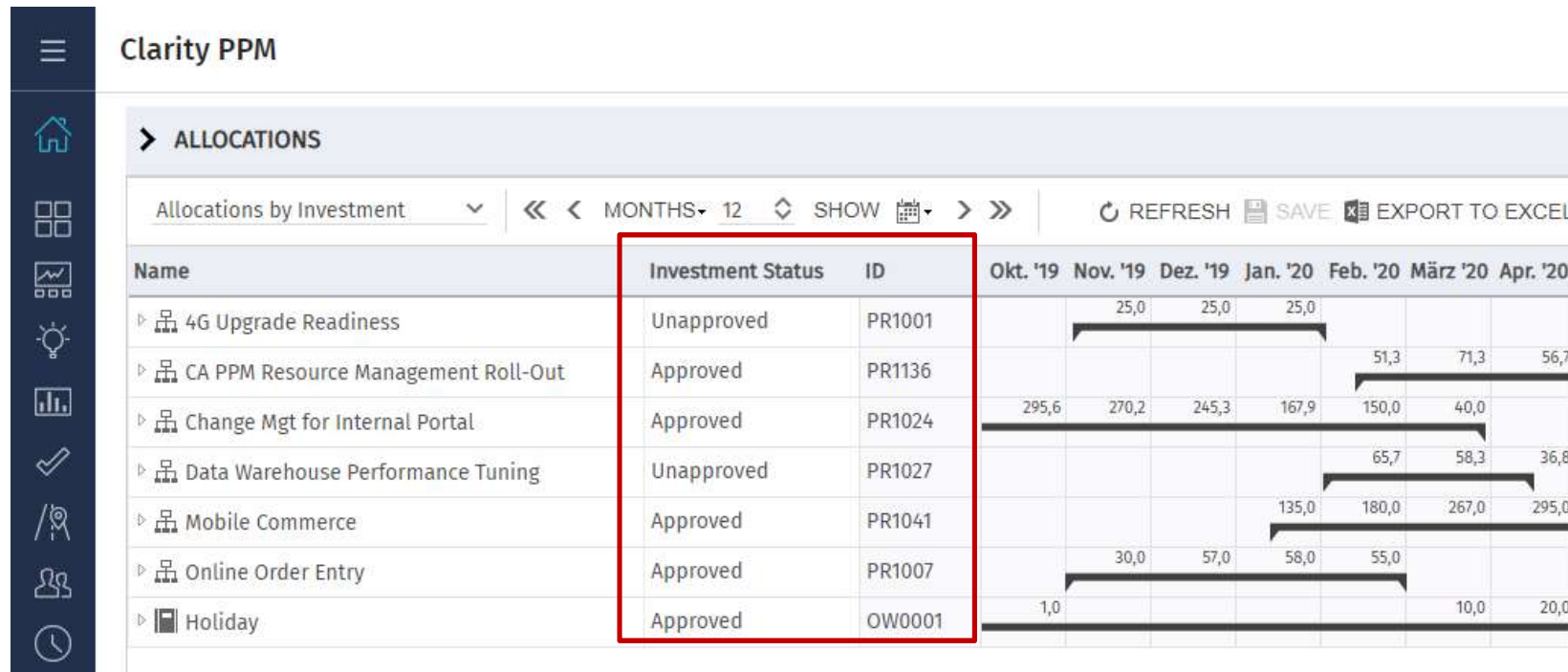
**RIGHT COLUMN:**

- Resource - Primary Role
- Resource - Is Role
- Team - Team has Planned Allo

Customize your view and use the configurable filters – any standard or custom attribute can be used for filtering

# Custom attributes & columns

Filter and display your custom columns



The screenshot shows the Clarity PPM interface with the 'ALLOCATIONS' table. A red box highlights the 'Investment Status' and 'ID' columns. The table displays various projects and their allocation values across months from October 2019 to April 2020. The 'Investment Status' column shows 'Unapproved' or 'Approved' for each project, and the 'ID' column shows the project identifier.

Name	Investment Status	ID	Okt. '19	Nov. '19	Dez. '19	Jan. '20	Feb. '20	März '20	Apr. '20
4G Upgrade Readiness	Unapproved	PR1001		25,0	25,0	25,0			
CA PPM Resource Management Roll-Out	Approved	PR1136					51,3	71,3	56,7
Change Mgt for Internal Portal	Approved	PR1024	295,6	270,2	245,3	167,9	150,0	40,0	
Data Warehouse Performance Tuning	Unapproved	PR1027					65,7	58,3	36,8
Mobile Commerce	Approved	PR1041				135,0	180,0	267,0	295,0
Online Order Entry	Approved	PR1007		30,0	57,0	58,0	55,0		
Holiday	Approved	OW0001	1,0					10,0	20,0

# Export all views to Excel

Expanding / collapsing is included in the Excel file

Clarity PPM

Mein Team [DELETE](#)

Allocations by Resource [REFRESH](#) [SAVE](#) **EXPORT TO EXCEL** [SCENARIO](#) [VISUALIZATION](#) [PREFERENCES](#) [ABOUT](#) [FULLSCREEN](#)

MONTHS - 12 [SHOW](#) [>](#)

Name	Okt. '19	Nov. '19	Dez. '19	Jan. '20	Feb. '20	März '20	Apr. '20	Mai '20	Juni '20	Juli '20	Aug. '20	Sep. '20
Architect	33,0 / 73,0	31,5 / 47,0	32,0 / 57,1	33,0 / 77,3	30,0 / 2,5	52,0 / 2,1	22,0 / 12,4	21,0 / 6,3	22,0 / 54,8	0,0 / 78,0	0,0 / 85,0	0,0 / 176,0
Berry, Jason Developer	20,0 / 3,0	20,0 / 1,0	20,0 / 2,0	15,0 / 8,0	30,4 / -10,4	29,6 / -7,6	5,0 / 17,0	5,0 / 16,0	45,0 / 7,0	15,0 / 8,0	15,0 / 6,0	0,0 / 22,0
Childers, Valerie Architect	20,0 / 3,0	20,0 / 1,0	20,0 / 2,0	24,6 / -1,6	28,6 / -8,6	30,7 / -8,7	17,4 / 4,6	11,4 / 9,6	7,0 / 15,0	5,0 / 18,0	5,0 / 16,0	0,0 / 22,0
Cooper, Andy Developer	19,0 / 4,0	24,0 / 2,0	23,4 / 3,6	17,0 / 11,0	35,4 / 2,1	24,6 / 11,8	35,9 / -4,9	19,1 / 1,9	10,9 / 11,1	0,0 / 23,0	0,0 / 21,0	0,0 / 22,0
Developer	61,6 / 24,4	71,2										
Evans, Sean Developer	23,0 / 0,0	23,0										
Gillian, Erin Developer	20,0 / 3,0	25,0										
Gupta, Rakesh Developer	23,0 / 0,0	23,0										
Hayes, Justin Architect	20,0 / 3,0	20,0										
Hill, Wayne Developer	0,0 / 23,0	0,0										
Johnson, Eric Developer	22,0 / 1,0	15,0										

datadownload (1) - Excel

Datei Start Einfügen Seitenlayout Formeln Daten Überprüfen Ansicht Was möchten Sie tun?

D115

	A	B	C	D	E	F	G
	Name	Okt. '19	Nov. '19	Dez. '19			
		Planned Allocation	Remaining	Planned Allocation	Remaining	Planned Allocation	Remaining
1	Architect	33,0	50,0	31,5	25,5	32,0	35,1
10	Berry, Jason	20,0	3,0	20,0	1,0	20,0	2,0
17	Childers, Valerie	20,0	3,0	20,0	1,0	20,0	2,0
23	Cooper, Andy	19,0	4,0	24,0	-3,0	23,4	-1,4
29	Developer	61,6	1,4	71,2	-36,2	58,8	-9,5
41	Evans, Sean	23,0	0,0	23,0	-2,0	23,0	-1,0
46	Gillian, Erin	20,0	3,0	25,0	-4,0	25,2	-3,2
51	Gupta, Rakesh	23,0	0,0	23,0	-2,0	24,1	-2,1
56	Hayes, Justin	20,0	3,0	20,0	1,0	20,0	2,0
59	Hill, Wayne	0,0	23,0	0,0	21,0	0,0	22,0
64	Johnson, Eric	22,0	1,0	15,0	6,0	15,0	7,0

# Customizable thresholds

Chose when a person's availability is highlighted in green, yellow or red

Grey /Green indication

15,0 / 7,0   22,0 / 1,0

**UTILIZATION RATE**



LOW UTILIZATION AT AND BELOW: 80,0%

UTILIZATION WARNING ABOVE: 100,0%

HIGH UTILIZATION ABOVE: 105,0%

**UTILIZATION FILTER**

STAFF OBS UNIT:

Yellow indication

22,0 / -1,0

Red indication

23,0 / -3,0

# Customizable data

Choose the data you want to display

**CELL CONFIGURATION**

Juli '19	Aug. '19	Sep. '19	Okt. '19	Nov. '19
38,5	45,8	58,5	45,2	10,3
				30,5
			52,0	31,3

FIELD TO DISPLAY ON THE LEFT PART OF THE CELL (READ ONLY):

Actuals

FIELD TO DISPLAY ON THE RIGHT PART OF THE CELL (EDITABLE):

Empty

Planned Allocation

Hard Allocation

ETC

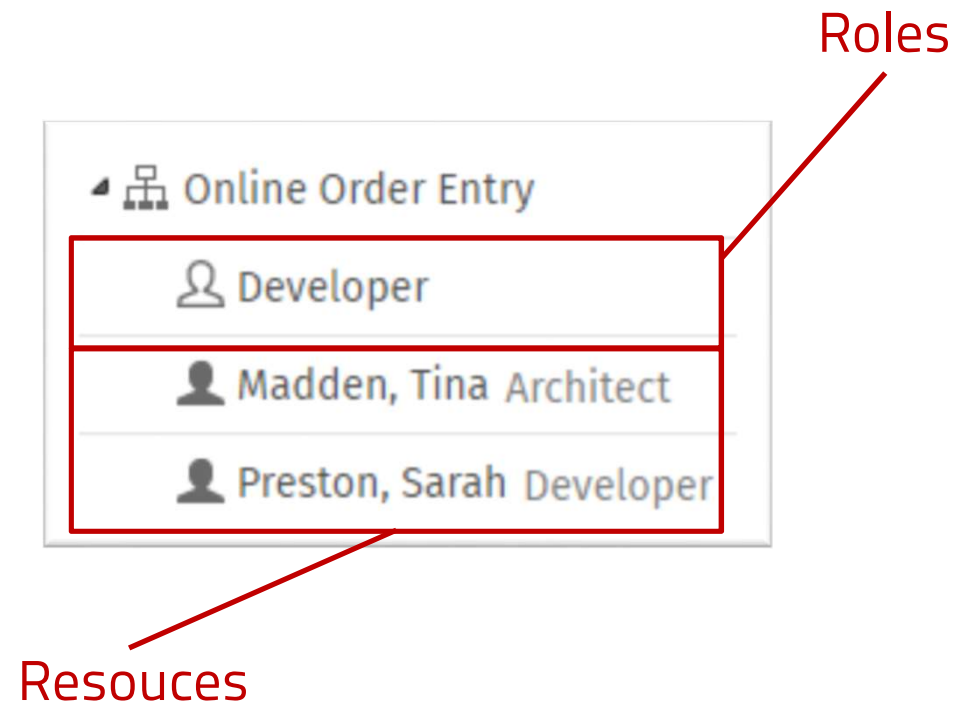
Actuals

Actuals + ETC

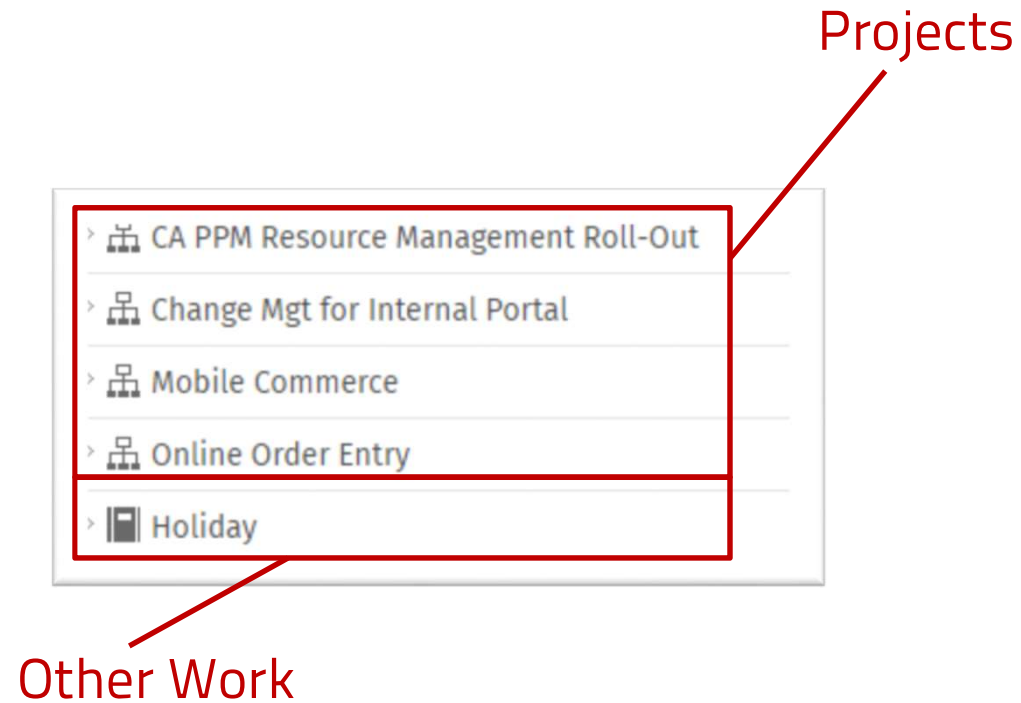
Requested

Availability

# Distinction between Roles and Resources



# Distinction between different Investments



# Advantages

- Professional yet simple resource planning in Clarity PPM
- All data in one single view
- Maximum transparency and efficiency
- Instant feedback when editing allocations and assignments
- Overview of capacity and utilization in real time to avoid bottlenecks
- Realistic and reliable planning leads to more motivated employees

[advanced-resource-planning.com](http://advanced-resource-planning.com)



# itd Advanced Resource Planning – For an even better Clarity PPM



„Without the editors we wouldn't have done any resource management in Clarity PPM at all.“



„Advanced Resource Planning enables us to intuitively plan, commit and replace resources.“



„It's a lot easier now to fix problems directly.“



„Finally Clarity PPM is fast enough to cope with all our projects and resources.“

itd Advanced Resource Planning



**45**

CUSTOMERS WORLD WIDE



**10**

NEW CUSTOMERS IN 2017

A photograph of a person's hands typing on a laptop keyboard, with a red semi-transparent overlay covering the entire image. The laptop screen displays a software interface with various charts and data. The text 'Thank you for your attention!' is written in white across the middle of the image.

# Thank you for your attention!

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