

Innate Resource Manager

Project and resource managers attempting to manage the utilisation of resources with spreadsheets often face issues with the accuracy of their data. Steve Cotterell examines an application that could give them the answer.



Innate is a UK-based software vendor that specialises in resource management software. The company was established in 1992 and has more than twenty years' experience in this field. It has more than eighty active clients across many industry sectors, with more than a quarter of these being overseas.

Most of the people who buy Innate are using spreadsheets which are not doing the job they need them to. Often, a number of teams are each using their own spreadsheets which, more often than not, get out of synchronisation.

Poor levels of resource utilisation can severely impact the overall profitability of an organisation. It must have an adequate number of people, with the appropriate skills and who are available for work, to have a chance of completing a project successfully.

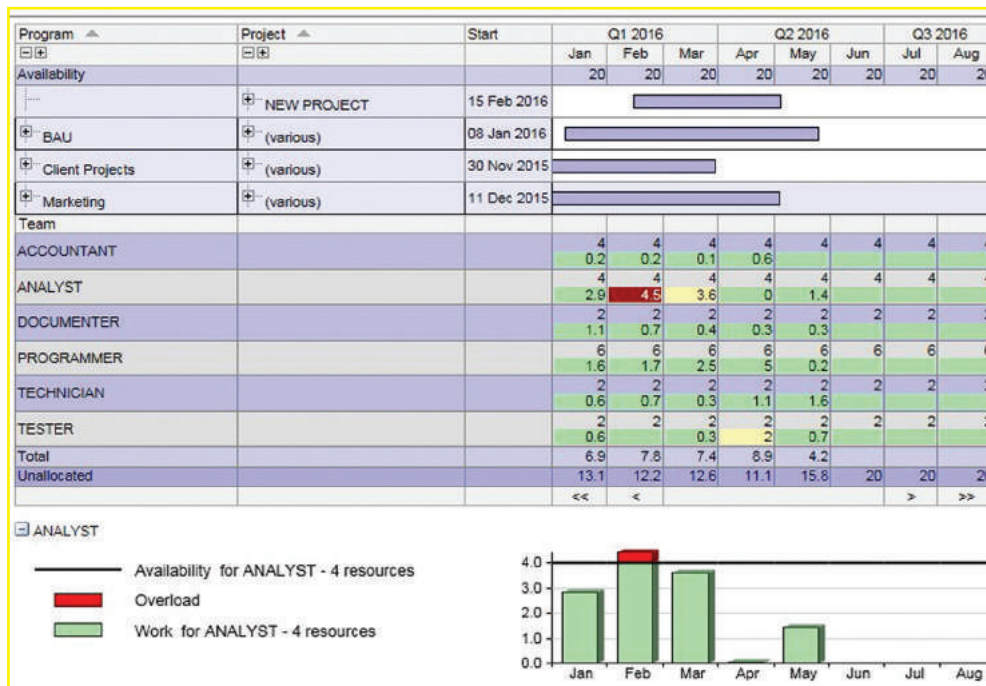
Within the resource management software sector, there are simpler products available that do not

have the permissions systems and assignment status settings necessary to provide work flow support for the key roles and, at the high end, there are enterprise project management tools that provide similar facilities to Innate, but as an integral part of more complex enterprise level software.

Innate's software aims for the middle ground and has been designed to help you strike the right balance by highlighting skills bottlenecks and spare capacity in all areas of the organisation, particularly in a volatile multi-project environment.

It does this by supporting three key roles in the project management process. These are the project managers who are doing the planning and requesting resources, the resource managers who are receiving requests for their resources and proposing candidates and the senior managers who will be overseeing the entire process.

Some, low end products available don't provide adequate resource management functionality. Some high end systems provide that functionality, but as part of a complex enterprise system. Innate Resource Manager aims at the middle ground.



Dynamic demand management. RAG colours and numbers change as project bars are dragged in time, so that work can be repositioned to avoid resource overloads and maximise team utilisation (Amber cells indicate 90 - 100% utilisation)

Resource Planning view. Amend work profiles as required. Define required attributes when requesting resource, e.g. languages, and use Assignment status list to track each assignment through the resource allocation process.

Project	Task	Resource	Required Languages	Assignment Status	Start	Finish	Feb 2016					Mar 2016									
NEW PROJECT	Design	ANALYST	French, German	Requested	01 Feb 2016	25 Feb 2016	1	8	15	22	29	7	14	21	28	4					
NEW PROJECT	Programme	PROGRAMMER		Requested	29 Feb 2016	31 Mar 2016						2	2	2	2	1.60					
NEW PROJECT	Programme	TESTER		Requested	14 Mar 2016	07 Apr 2016							1	1	1	0.60					
NEW PROJECT	Release	TECHNICIAN		Requested	04 Apr 2016	21 Apr 2016										1					
Total												1	1	1	0.80	2	2	3	3	2.60	1.80

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There is considerable flexibility in how Innate Resource Manager can be configured, However, implementation is generally completed within a couple of weeks and training groups of users takes no more than half a day. During the initiation process, Innate takes the organisational structure of the company into account when configuring how the data held is displayed. A list of the fields that the data is stored into is constructed and the way drill-downs are handled is specified.

Because the system is so configurable, it's unlikely that any two installations are going to be exactly the same. This review is based on a sales demonstration system held by Innate.

Innate Resource Manager is available as an SaaS system, hosted by Innate, or as a client hosted system.

During the initial system set up, details of the resources available are entered into the system. Information about each resource can include their skills, languages, cost centre, location, department, team, etc. - whatever attributes are needed when searching for suitable resources.

Each resource is also associated with appropriate calendars which may, for example, be based on their location.

The area in which you store information about projects is also configured and the fields available include programme, client, and so on. Details of the work breakdown structure used by the company are recorded and you can also create a set of status indicators for use when producing reports.

Details of the cost rates applied to different types of resources are also input. These can be applied by grade and can be set to apply from a specific date, giving you the ability to enter the details of a rate increase prior to its application. Multiple rates per grade can be stored in order to accommodate overtime, weekend working and the like.

Billing rates may be entered, and these can include multiple rate options per grade so that different rates can be applied depending on the client and/or the project.

Innate Resource Manager uses a role-based permission system giving each role its own set of permissions and a role-based, tabbed homepage display that gives people

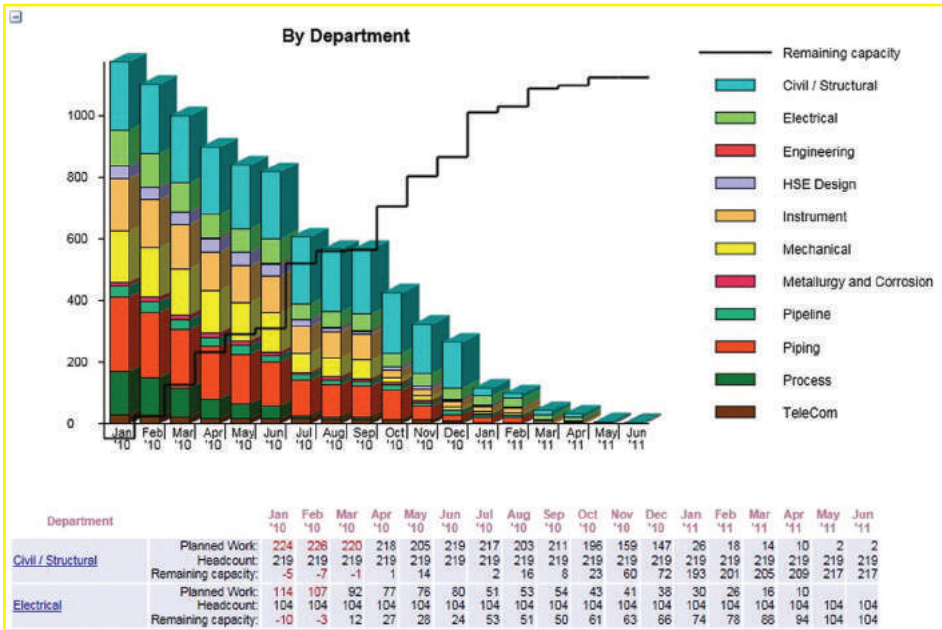
access to the menu options that their role entitles them to. Project plans can also be imported from and synchronised with Microsoft Project. An additional button is added to Microsoft Project's toolbar and this allows Microsoft Project's data to be sent to Innate.

Project managers setting up a new project will use Innate's "Manage Projects - New" option. You can create a new project from scratch or use a previously stored template. The amount of data stored in the template will depend on the type of project being started and the organisation's own requirements, but it could range from a detailed, generically resourced template to one that contains just a basic project framework.

You enter the start date and hit the "Create" button, causing the "Project Details" screen to be displayed. On this screen, you complete the required details and save it. The project's work breakdown page, which is the project manager's main resource planning view, then opens and, if included in the template, details of the generic resources required and the hours involved are shown thereon. The assignment status of each resource is shown as "Requested". Each of the attributes (skills, location, etc.) needed by the required generic resources is displayed in a separate column on this screen and, using these columns, you can specify which attributes are required by each resource. Each project manager can tailor their display to change the order in which columns are displayed and show or hide specific columns.

To the right of the attribute columns is the resource requirement profile showing the number of day's work required in each time period. You can edit this as required and this screen acts in much the same way as an Excel spreadsheet in that you can insert new tasks and cut, copy and paste data. To assist data entry, where more than one option exists for entry into any field, drop-downs can be set up.

When entering the hours of work required from a resource, you can enter the start and finish dates and the total number of hours to be worked. You can then apply a standardised work distribution curve to spread the hours as you decide (bell, back loaded, front loaded, etc.) or you can design your own curves at the initiation stage.



Forward Loading report showing resource demand and remaining availability. Click on department link to drill down through organisation structure to locate bottlenecks and periods of under-utilisation.

Once the data has been saved, all of Innate's reports (more later) are updated immediately.

The project manager would then open the "Skills Capacity Planning" view and would apply filters to see the details of resources with specified skills who are working on a specific set of projects. Clicking the "Skills Capacity" tab opens a screen which can be displayed in a variety of configurations and which can contain three stacked sections. At the top you could show a Gantt chart illustrating the projects within the programme. Below that could be a spreadsheet table showing the budgeted work and availability for each resource team. This chart is RAG based so that deficiencies are shown as amber or red. Below that is a bar chart showing the overloads.

The middle pane can be displayed at team level but, if required, this can be expanded to show work at individual level within each team. In this case, the lower bar charts will show the top one for the team and below that will be a separate chart for each member of the team. In order to display charts with many rows of data, Innate Resource Manager is able to utilise high-resolution portrait display screens.

By dragging a project's bar backwards and forwards in time on the Gantt chart, you can reposition the work into a period when resources are available. The figures on the lower two charts change in synchronisation with the movement of the project. This operation can be carried out on either the live data or you can construct a scenario which can be saved and later used to update the live data. Where there's more detail than can be shown in the on-screen charts, scroll bars enable you to change the focus of the display.

When you create a scenario, all the information in the system is available to the scenario but, when you

change it, you are not changing the live data, you are just changing the data held in the scenario.

Should it not be possible to release resources by moving the new project it may be necessary to delay some of the existing projects, should there be projects with a lower priority, to release their resources. This is the type of operation that the project manager may do to re-balance the projects following a weekly demand meeting.

There is an "Accept" button on the scenario screen (with limited permissions to prevent all and sundry changing the live data) to enable the live data to be updated from it.

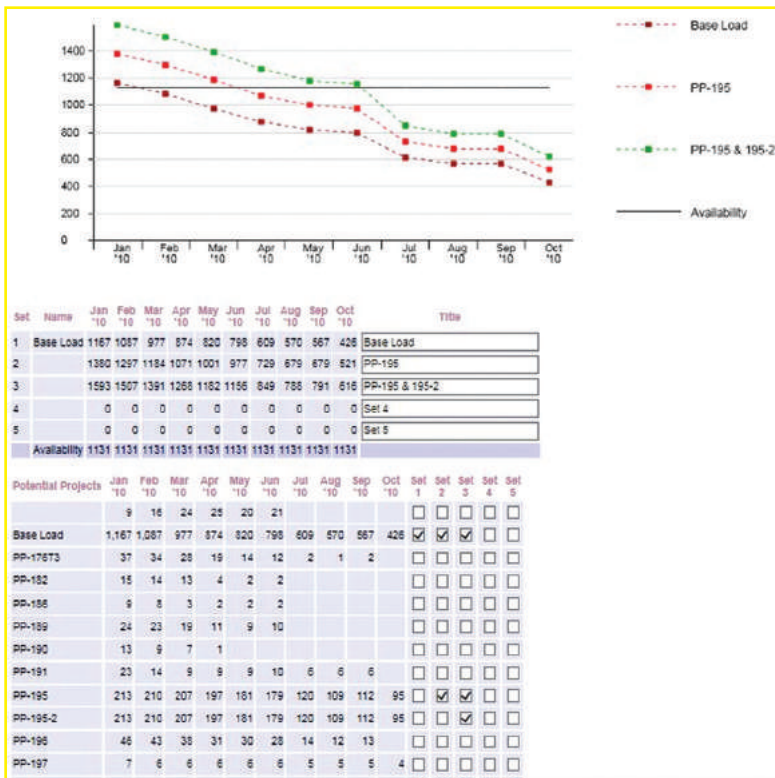
Multiple baselines can be stored and, once the data has been updated, all affected project managers and resource managers can run comparison reports to examine the effect on their projects.

Once the requests have been issued to the resource managers, they will appear on the resource manager's home pages, in the "Outstanding Requests Action List". Clicking on a link beside a specific resource request, the resource manager is taken to that request's "Allocate Resource" view. The required attributes are shown, as is the demand profile.

The resource manager highlights one of the generic resources in the list, right clicks and selects "Replace Resource". The system automatically searches for a resource with the correct attributes and availability. A list of the resources it has found is then displayed. If the search is unsuccessful, the resource manager can relax specific attribute requirements and rerun the search. The resource manager then selects the most suitable available resource from the list and clicks "Save".

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Scenario comparison. Create multiple scenarios with different combinations of potential projects on top of committed work, to show resourcing impact of each scenario.



The requesting project manager can now see the details of the suggested resource on his or her own home page along with that person's attributes and availability and can accept or reject the proposed candidate.

Optionally, once work has started, should the project manager make a change to the plan that affects the work required from a resource, the system can be configured so that the resource manager is immediately able to see details of the change to requirements and can reconfirm or reject the allocation. The project manager can attach an explanatory note to the change request.

The resource manager also has a "My Resources" view. This lists all of the resources under his or her control, with an indicator if any individual is overloaded. Clicking on an individual's name displays a table showing all of the work that person is assigned to. This could be displayed down to task level if required.

A scenario comparison report can be produced and this shows the existing position compared with that brought about by a selected set of scenarios. The system includes a report editor to enable reports to be tailored to individual requirements.

Once a scenario has been saved it is not set in stone as, if during the course of business anything changes

in the projects included in the scenario, those changes will be reflected in the scenario.

Senior managers can have resource utilisation information delivered to them by the system. The "Forward Loading by Department" view shows the demand for resources and the spare capacity. This report can be produced for any level in the organisational structure.

Data can be imported into Innate from human resource systems and this can be either on an ad hoc basis or automated on a regular basis. Business rules can be built into the controlling scripts to manage events. Timesheet data from Innate Timesheet automatically updates the system's database. Data from other timesheet systems can be imported in much the same way as human resource data. Data can also be exported from innate into other systems such as finance.

Resource plans prepared in Microsoft Project can be synchronised with Innate Resource Manager so that demand is updated and details of assigned resources are returned to Microsoft Project. Data can also be exchanged with other project management systems via CSV, comma delimited text files.

How much does it cost?

Annual fees are based on the size of the resource pool and the hosting arrangements. For one hundred resources, the cost would be about £11,000 and for five hundred, about £35,000. All prices exclude VAT.

Right to Reply

Our thanks to Steve for a useful review of the Innate software. If you would like to explore us further, we offer a proof of concept workshop where we take some of your data and configure the system to show how we can support project and resource managers through your own demand management and resource allocation processes.

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