



DATA SHEET

Resource Management

KLUSA's resource management gives a better overview, a simpler handling and an optimized use of resources in the PROJECTS, RESOURCES, MYKLUSA, and ADMINISTRATION modules. These items are discussed in the following sections.

Functional overview

Professional resource management primarily cares about people and not that much about material or machines. This article understands the notion “resource” exactly in this way! For the field of material or machines, other modules or systems are available.

KLUSA aims to support companies assigning internal and external project team members to projects. A coordinated capacity planning is a prerequisite for projects completed in time and an optimized resource workload. Besides the pure project based request of team members, the optimized utilization of existing capacity stands at the focal point. KLUSA offers the tools to support resource management in the projects as well as in the departments at its best and therefore provides the following functions:

- Management of resources, their skills and capacities in resource pools
- Support of the resource planning & approval workflow between project managers and resource managers
- Availability of real-time workload and capacity charts
- Overviews and simulation modes to level capacity fluctuations
- Planning granularity from quarters, months, weeks, down to days,
- Region calendars (incl. working days as well as holydays) and resource worktime models are considered
- Many comfort features like bulk processing of resource assignments, display of workload fluctuations at different levels
- Support for the workflow states “Entered”, “Requested”, “Booked” and “Rejected”
- More transparency for project managers, human resources managers and team members through collapsible columns, various filters and grouping options

Generation and administration of resource pools

The line manager, e.g. the department head (referred to in the following as resource manager) organizes the resources that have been allocated to him into one or more groups, named resource pools. There are the following options:

- Creating and maintaining the resource pools based on the personnel and other attributes such as skills (qualifications, abilities, or knowledge), locations, etc.
- Allocating resource pools to cost centers (for the purpose of subsequent plan cost evaluation during the projects)
- Assignment of skills to personnel
- Determining capacity per skill and period
- Allocating a worktime model to personnel
- Exporting all data to Microsoft Excel for more different analysis

After a resource pool has been created and populated, the project managers make use of the resources to staff their projects.

Safe Mode RESOURCES Overview									
Pool Overview Resource Requests Overview Project Summary Finished Time Records									
Level < 2 > Granularity Monthly Period < All > < 2017 >									
#	User/Project/Work package	No. of comments	Total [PD]	Total [h]	Jan 17	Feb 17	Mar 17	Apr 17	May 17
1	▲ Total	17	99.27	794.11	377.41	62.36	124.24	86.00	57.30
1.1	▷ Lazar, Zoltan		9.00	72.00					
1.2	▷ Lentner, Sebastian		1.50	12.00					12.00
1.3	▷ Lentner, Sebi		0.63	5.00					5.00
1.4	▷ Mustermann, Max		2.00	16.00					16.00
1.5	▷ Nonne, Rudi	17	2.81	22.30					8.30
1.6	▷ SLE, Resource1		10.38	83.00	83.00				
1.7	▷ SLE, Resource6		11.13	89.00	89.00				
1.8	▷ Straka, 01		36.00	288.00	80.00	48.00	64.00	80.00	16.00
1.9	▷ Zimmermann, Robert		25.84	206.41	125.41	14.36	60.24	6.00	

Overview of all projects' time accounting data of all pools

Request and approval workflow

KLUSA's planning and approval workflow supports the optimum assignment of available resource capacities, with the effect that resource bottlenecks or critical shortages can be avoided. Planning reliability increases. The planning steps are classified as follows:

- Resource planning (project manager)
- Resource request (project manager)
- Resource request approval (resource manager)
- Resource request rejection (resource manager)

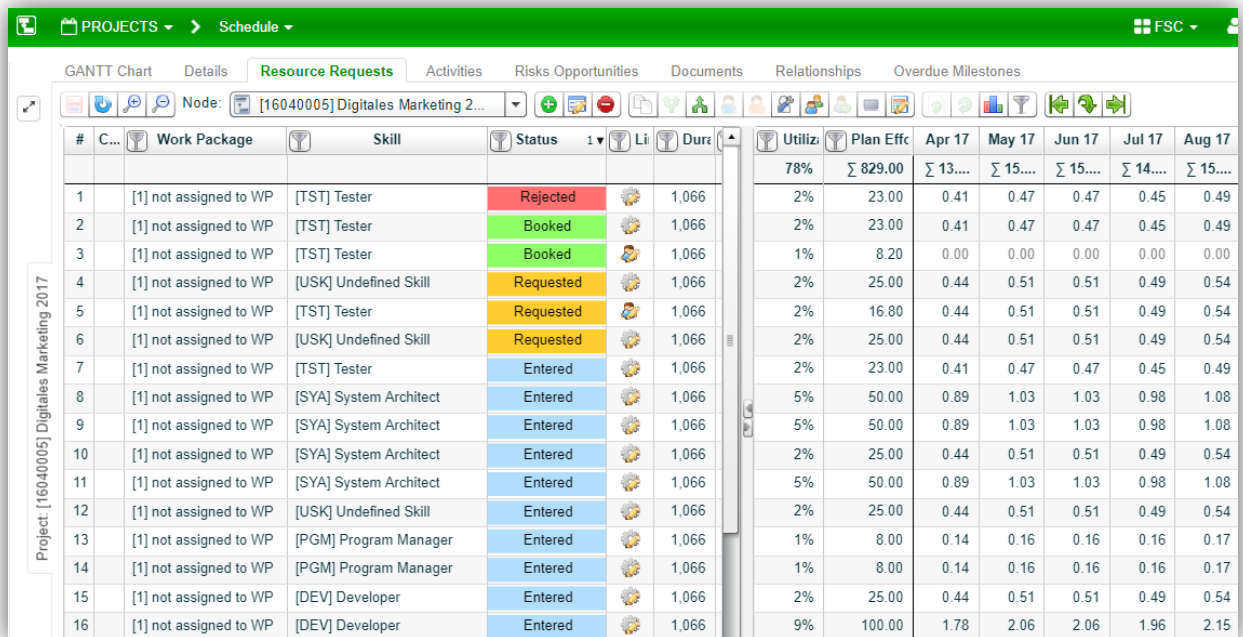
Resource planning and requesting by the project manager

The project manager plans the demand for the required resources in the PROJECTS module. He receives direct support for this task, as Klusa displays the availability of resources for a given period in real time. Skills or individual persons can be planned per period and for each work package of a project.

You can immediately plan the necessary personnel on the currently selected work package in the Resources index tab. Thereby, each valid region calendar (administered at pool level) and worktime models of the team members are taken into account automatically. The resource planning can be manually entered at different detail level (quarter, month, week, and day) as a draft ("Entered") or directly as a resource request ("Requested"). The values are automatically distributed to the respective periods.

As a matter of principle, a skill is sufficient for the resource planning of the project manager. An official resource request at least needs entering a resource pool as address. All other information, such as start and end date, duration, etc. are initially suggested by KLUSA, refine the schedule and make the decision easy. With supporting table and chart views of the resources workload, you can better oversee the resource availability.

When editing (delete, move, extend, shorten) existing resource assignments, the system tries to cover the existing planning as precisely as possible so that no planning information is lost. Rules and automatic functionality can assume a logical redistribution of resource assignments here, if necessary with a new approval workflow.



#	C...	Work Package	Skill	Status	Li	Durc	Utiliz	Plan Effc	Apr 17	May 17	Jun 17	Jul 17	Aug 17
1	[1] not assigned to WP	[TST] Tester	[TST] Tester	Rejected		1,066	2%	23.00	0.41	0.47	0.47	0.45	0.49
2	[1] not assigned to WP	[TST] Tester	[TST] Tester	Booked		1,066	2%	23.00	0.41	0.47	0.47	0.45	0.49
3	[1] not assigned to WP	[TST] Tester	[TST] Tester	Booked		1,066	1%	8.20	0.00	0.00	0.00	0.00	0.00
4	[1] not assigned to WP	[USK] Undefined Skill	[USK] Undefined Skill	Requested		1,066	2%	25.00	0.44	0.51	0.51	0.49	0.54
5	[1] not assigned to WP	[TST] Tester	[TST] Tester	Requested		1,066	2%	16.80	0.44	0.51	0.51	0.49	0.54
6	[1] not assigned to WP	[USK] Undefined Skill	[USK] Undefined Skill	Requested		1,066	2%	25.00	0.44	0.51	0.51	0.49	0.54
7	[1] not assigned to WP	[TST] Tester	[TST] Tester	Entered		1,066	2%	23.00	0.41	0.47	0.47	0.45	0.49
8	[1] not assigned to WP	[SYA] System Architect	[SYA] System Architect	Entered		1,066	5%	50.00	0.89	1.03	1.03	0.98	1.08
9	[1] not assigned to WP	[SYA] System Architect	[SYA] System Architect	Entered		1,066	5%	50.00	0.89	1.03	1.03	0.98	1.08
10	[1] not assigned to WP	[SYA] System Architect	[SYA] System Architect	Entered		1,066	2%	25.00	0.44	0.51	0.51	0.49	0.54
11	[1] not assigned to WP	[SYA] System Architect	[SYA] System Architect	Entered		1,066	5%	50.00	0.89	1.03	1.03	0.98	1.08
12	[1] not assigned to WP	[USK] Undefined Skill	[USK] Undefined Skill	Entered		1,066	2%	25.00	0.44	0.51	0.51	0.49	0.54
13	[1] not assigned to WP	[PGM] Program Manager	[PGM] Program Manager	Entered		1,066	1%	8.00	0.14	0.16	0.16	0.16	0.17
14	[1] not assigned to WP	[PGM] Program Manager	[PGM] Program Manager	Entered		1,066	1%	8.00	0.14	0.16	0.16	0.16	0.17
15	[1] not assigned to WP	[DEV] Developer	[DEV] Developer	Entered		1,066	2%	25.00	0.44	0.51	0.51	0.49	0.54
16	[1] not assigned to WP	[DEV] Developer	[DEV] Developer	Entered		1,066	9%	100.00	1.78	2.06	2.06	1.96	2.15

Resource planning and request by the project manager in the PROJECTS module

Resource approval or rejection by the resource manager

The resource manager has a comprehensive overview of availability, project requests, remaining capacities and possible overbooking of the team members.

Using predefined calendar per resource pool, you can manage dates of working and non-working days that are taken into account in the booking process as well as the work time models of single team members. Also, you can assign multiple skills to single team members.

Thus, the resource requests can be analyzed more detailed, be approved - or if necessary - be rejected. Comfort features allow

- the view of capacities, effort, and base load of all the team members or requesting projects as a table or a chart
- the bulk bookings of team members, also with a split by a certain date
- the adjustment of columns that you really like to see
- reasonable group-by and filter functionality

#	L...	C...	Project Nan	Work Packa:	Skill	Status	Plan Effo	Jun 17	Jul 17	Aug 17	Sep 17	Oct 17	Nov 17	Dec 17	Jan 18
							10,103.70	196.66	206.81	226.51	206.81	206.66	206.66	186.81	215.16
							Σ 133.00	Σ 3.34	Σ 3.19	Σ 3.49	Σ 3.19	Σ 3.34	Σ 3.34	Σ 3.19	Σ 4.84
1			Digitales Marketir	[1] not assigned t	[TST] Tester	Requested	16.80	0.51	0.49	0.54	0.49	0.51	0.51	0.49	0.51
2			Digitales Marketir	[1] not assigned t	[USK] Undefin...	Requested	25.00	0.51	0.49	0.54	0.49	0.51	0.51	0.49	0.51
3			Digitales Marketir	[1] not assigned t	[USK] Undefin...	Requested	25.00	0.51	0.49	0.54	0.49	0.51	0.51	0.49	0.51
4			MHE_Rollout Cus	[3] Initiation	[DES] Designer	Requested	1.00							0.00	1.00
5			Meteoritenabweh	[1] not assigned t	[ADM] Admini...	Requested	10.00	0.85	0.81	0.89	0.81	0.85	0.85	0.81	0.35
6			MHE_Rollout Cus	[3] Initiation	[DOC] Docum...	Requested	1.00							0.00	1.00
7			Digitales Marketir	[1] not assigned t	[TST] Tester	Booked	8.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
8			Digitales Marketir	[1] not assigned t	[TST] Tester	Booked	23.00	0.47	0.45	0.49	0.45	0.47	0.47	0.45	0.47
9			Digitales Marketir	[1] not assigned t	[TST] Tester	Rejected	23.00	0.47	0.45	0.49	0.45	0.47	0.47	0.45	0.47

Resource approval or rejection by the resource manager in the RESOURCES module

Overviews and planning simulations

My Work

In the tab My Work, you can see the projects and work packages you are planned in. Thereby you can see the time line, details on projects and work packages, status and the necessary skill in a table. A chart shows your effort and capacity in a time line that you can adjust down to a daily level. Also, you can distinguish here between project and status.

Resource Overviews

From the resource manager's point of view, the observation of resource capacities and workloads throughout several pools is of great importance. Klusa provides the necessary charts and tables for this purpose:

- Grouping of the tables according to pool, skill, resource, project or planning status
- Setting the time period
- Drill-down possibilities by means of a simple click on the required element

Planning simulations using project variants

With its »Variants« function, KLUSA offers the opportunity to develop alternative plan scenarios during a project. The user (normally project managers or project office) has the opportunity to compare models and submit alternatives for decision. An alternative to a project can then be »activated«, with the result that this alternative becomes the current project plan.

Additionally, you can optimize your resource planning according to the available resource capacity in a portfolio scenario of the PORTFOLIO module (see also data sheet [Portfolio Management](#)).

Summary

KLUSA simplifies the tasks carried out by all roles involved in the project resource management:

- Support during the planning stage and clarification of the project charter: The project manager is aware of the availability of resources at an early stage and can plan according to possible resource shortages.
- Transparency: If project objectives are endangered due to the lack of available resources, this becomes evident at an early stage. The project manager can escalate resource conflicts immediately.
- Efficiency increase: Klusa provides the tools necessary for the optimum utilization of resources. This helps to prevent not only under- and overload situations.
- Planning reliability: The number of projects successfully completed on time will increase significantly as the project manager receives documented confirmation via the approval workflow.
- Overview of costs: It is possible to obtain a direct validation of costs as compared to the budget by assigning cost centers and cost rates to resource pools. This will create plan costs visible in the project during the resource planning process.

The assignment of resources can be optimized by applying KLUSA resource management. This is one basic key to successful projects. Ask for a KLUSA presentation and decide for yourself.



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