



product
sheet

maconomy
people
planner

Plan your resources and projects in one solution

Combining resource management with project planning for a complete resource and project overview can have a huge impact on utilisation in any Professional Services Organisation. With People Planner you get one integrated solution that supports project, department and senior managers as well as employees in their project and resource-related work.

People Planner enables you to abandon local spreadsheets or local stand-alone solutions in favour of a corporate solution for project planning and resource management.

Planning made simple

The key to successful resource planning is to make sure everybody does it. This way everybody gets the full corporate picture. Therefore, People Planner focuses on making resource and project planning simple. Few and simple role-based views that combine projects with resources give each role access to what they need. Nothing more, nothing less. Combined with a graphical user interface, the ease of use is high.



Increase utilisation

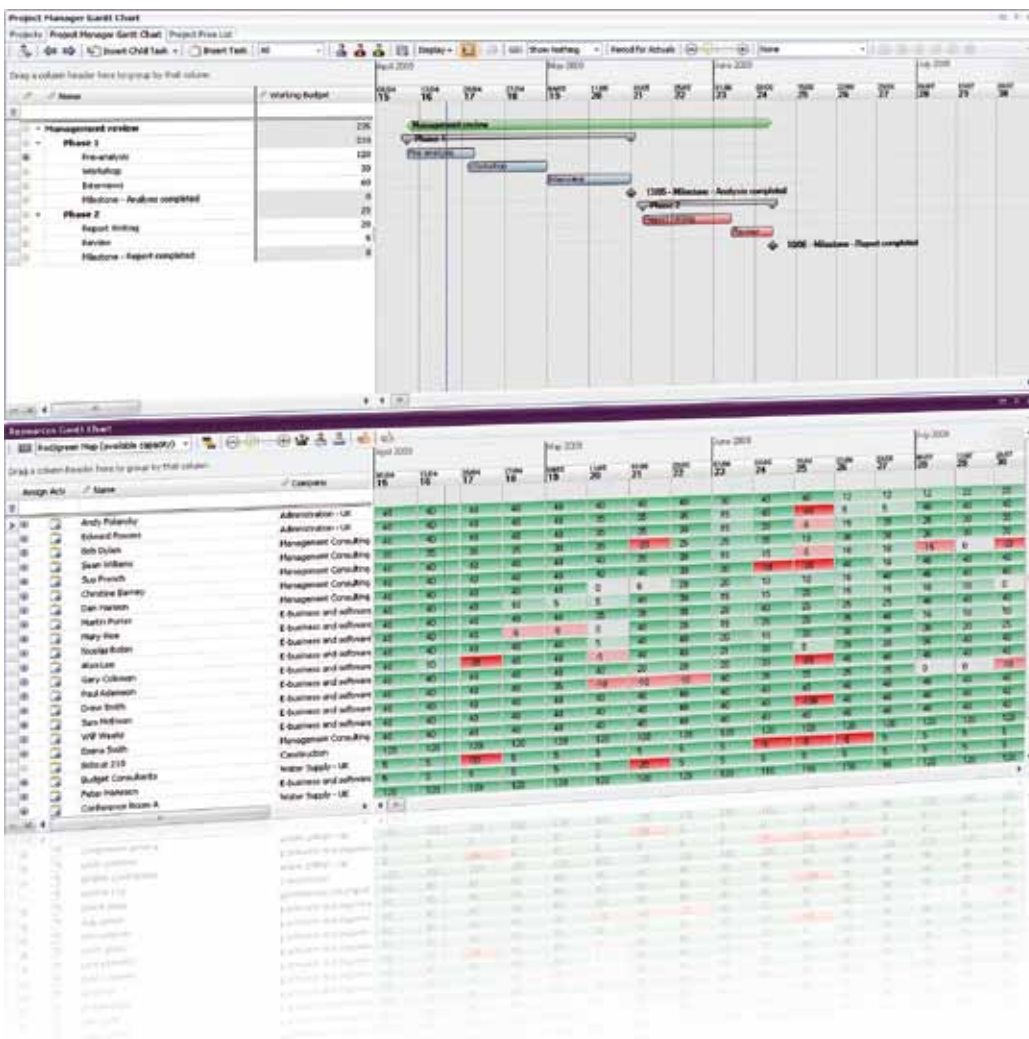
People Planner allows you to plan your projects more effectively and assign resources or teams more easily. This ultimately increases the number of hours spent on profitable activities. Project managers can reduce overruns by planning their projects and keeping control of progress against budget. Department managers can plan activities from a resource point of view, finding suitable projects and tasks for resources with available time and the right skills – and get a complete resource overview at any time.

Flexible planning at all levels

People Planner enables you to plan with maximum flexibility at any level of detail. You can plan your projects and resources either at the overall project level or in detail with full Work Breakdown Structure (WBS). You can plan on a daily, weekly or monthly basis depending on your needs, and you can plan the start and end times of your meetings if necessary.

Low implementation costs

Implementation costs are minimal. Business experts within your own organisation can easily configure the system without assistance from external consultants as the configuration is based on drag-and-drop. The solution is delivered with a best-practice setup to give you the best starting point.



Plan your projects

A single window featuring a planning grid and a Gantt chart provides project managers with a complete overview of their own projects. Department managers can see an overview of all projects belonging to their department. By simply dragging and dropping column headers, projects can be grouped, for example by customer, project category or project manager. This allows you to dynamically adjust the view to suit your current planning needs.

Project tasks can be scheduled graphically in the interactive Gantt chart by moving or resizing planning bars. Project phases can be broken down into tasks using full WBS.

The project budget can serve as your baseline budget in terms of revenue, cost and hours for the project, and allows you to measure project progress.

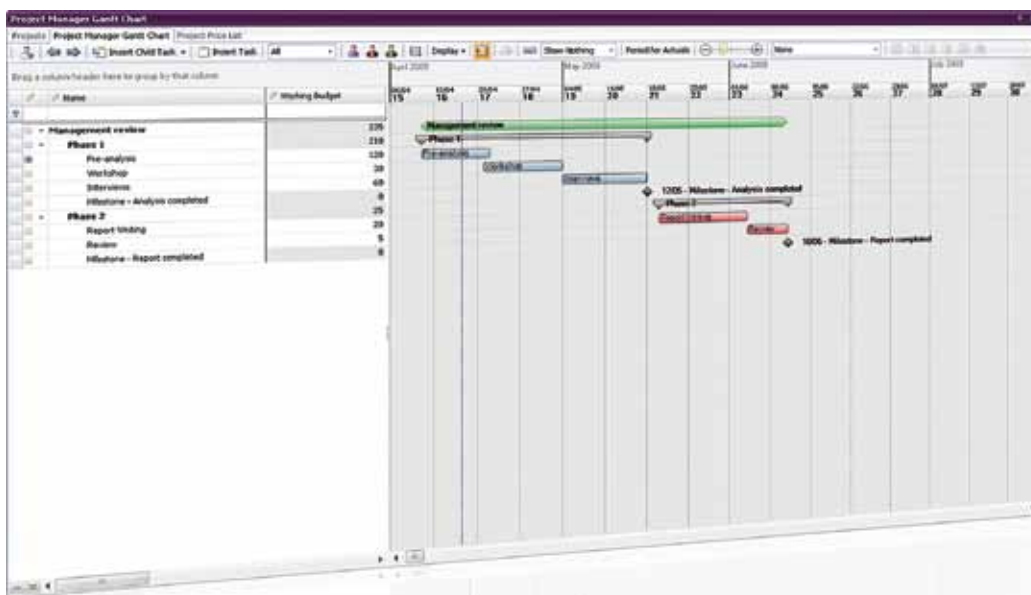
It is easy to assign the right resources and/or teams to project tasks. The planner can search for available employees who possess the skills that match the task in question in a single overview.

You can configure and add columns relevant to your company, for instance to forecast cash flow, determine detailed tasks for employees, set additional milestones etc.

If you work on many similar projects, you can reduce planning time by copy/pasting lines from previous projects or base it on templates.

Functionality

- Plan your entire project portfolio in a single window
- Base your project planning on templates
- Group projects dynamically by dragging and dropping column headers
- Drag and drop bars in Gantt charts to change the task schedule
- Drag and drop allocated hours from one employee or project to another to redistribute time
- Full Work Breakdown Structure (WBS)
- Estimate the size of your project in terms of hourly cost and revenue
- Get actuals and Estimates To Completion through integration with Maconomy to track progress against plans
- Set milestones for your project
- Find employees with the right skills and available capacity, then assign them to tasks without leaving your main view
- Assign teams to a task, phase or project
- Manage both projects and sub-projects
- Plan at project level or at detailed task level
- View project plans by day, week or month
- Free zoom and scroll on time horizon by day, week and month.
- Print information as shown on your screen



Plan your people

Department managers get a strong tool for planning resources in the long or short term. A Resource Gantt chart of the individual resources provides an instant overview of the project allocations for each employee. It is easy to spot available capacity, and you can change the Gantt chart with a single click to show workload, revenue forecast, available capacity or expected utilisation. Figures can be shown using colour codes for easy interpretation.

Drag-and-drop allows you to group employees, for example by employee category or department. This makes it easy to arrange the overview, view aggregated information and expand individual groups to view details.

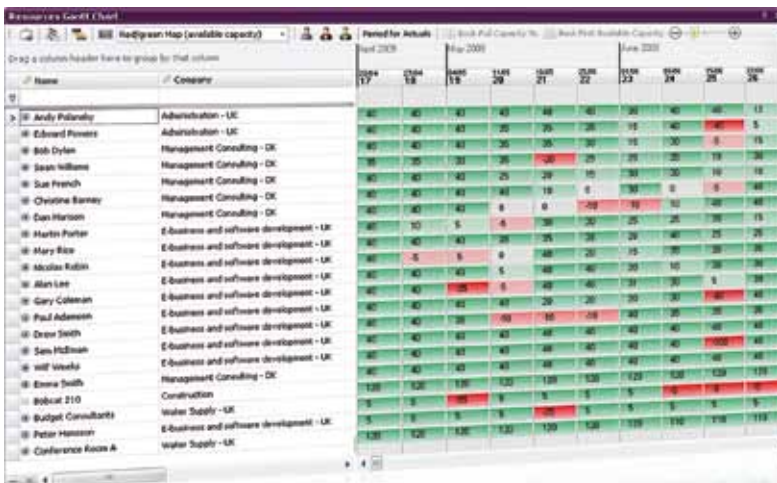
As all assignments are based on a project price list, you can create dynamic revenue forecasts. People Planner also provides you with an exact overview of the forecast by resource or department. You can view it by day, week or month, just by switching the period level you are watching.

Without leaving the overview, you can assign employees to projects or tasks by bringing up a list of projects and tasks. This enables you to match the skills of the employee and booking the employee with a single click. You can also rotate the view to see a complete project list and move resources around between projects and tasks.

The combination of instantly updated Gantt charts and straightforward resource allocation makes it easy to model different scenarios and immediately see the consequences on time schedules and future utilisation.

Functionality

- View all resources in one window
- Expand resource view to see project bookings for each resource
- Assign resources to projects and tasks without leaving overview
- Search for unstaffed tasks
- View resource bookings by day, week or month
- Full overview of the revenue forecast for your resources
- View actuals of all your resources in the past and compare with future performance – based on Maconomy time sheets
- Colour map with highlights of utilisation, available capacity and overload
- View resources, for example by department or category, using drag-and-drop grouping
- Identify future resource needs
- Plan your resources while viewing their availability
- Set up teams and assign resources at team level
- Plan with recurring tasks – for instance a particular project every Monday for the next 3 months
- Set up approval workflows
- Simulate different scenarios by changing plans and instantly viewing the consequences
- Redistribute time by dragging and dropping allocated hours from one employee or project to another
- Check the need for specific skills on future projects – and bring in the right resources in due time
- Export Gantt chart data to Excel for simulations and reports
- Use distribution tools to ensure balanced allocations or book available capacity
- Use copy/paste for allocations

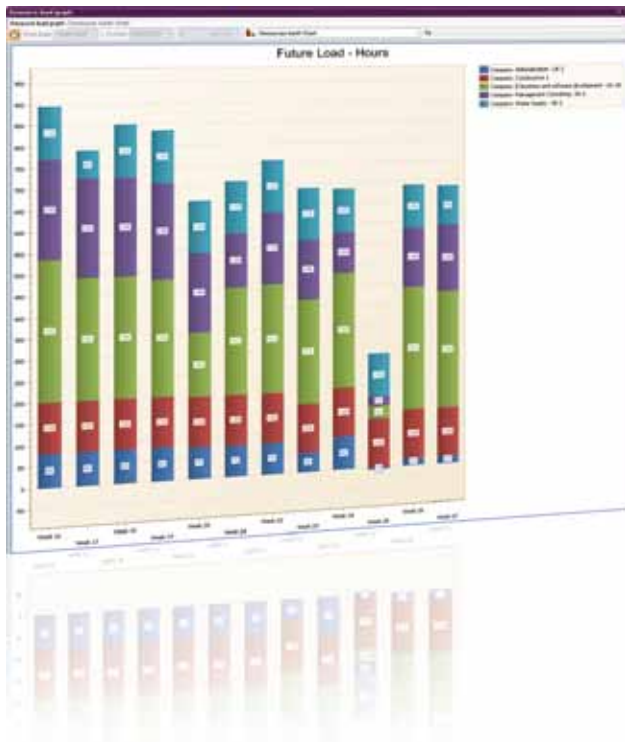


Executive overview

By including all projects and opportunities in your planning system, executive management have full insight into project plans, future resource utilisation, shortage of resources, etc. on an enterprise-wide scale. Bookings at the project, phase and task level are automatically summed up to give you a complete, reliable picture of the company's resource situation. This helps you evaluate how individual departments are performing in terms of utilisation.

Graphical reports designed specifically for executive management provide one-click access to information about utilisation, future revenue forecast and workload vs. total capacity.

Using the dynamic grouping functionality, you can easily drill down into figures to find the source of deviations or take a closer look at individual departments, projects, customers, skills, etc.



Functionality

- Graphical reports for full company overview
- View performance based on project bookings
- Enterprise-wide view of resource capacity and load
- Full revenue forecast for the whole company
- Monitor future utilisation by company, department, project, etc.
- Drag and drop columns to analyse figures
- View figures by project, department, division, company, employee category, skills, customer, etc.
- Derive utilisation percentages

Empower your employees

A customised Employee view allows employees to use People Planner to view the projects and tasks they are booked for. Employees can also search for – and assign themselves to – relevant projects and tasks.

The web-based user interface enables employees to view their assignments from anywhere – by day, week, and month or as a timeline – with the look and feel of Outlook. This means you can always get the latest updates of your schedules. Employees can access the My Plan calendar from a link in the Maconomy portal. Web Client access to My Plan is supported in Internet Explorer 7.0.

- View assignments for projects in a browser
- View your own "My Plan" in People Planner and/or the Maconomy portal
- Search for projects and tasks and assign yourself to them

Fast and easy configuration in a role-based solution

People Planner supports role-based operation with customised views for the specific user who logs in. You can set up role-specific views to optimise each view for a specific purpose and even filter, limit and group data. This enables you to present only relevant information to the user from the moment the user opens the view.

The configuration of your own layouts and views is simply a matter of dragging and dropping items on the screen. As no technical skills are required, business experts within your own organisation can design and configure views optimised for the processes in your organisation without assistance from external consultants.

Using the pre-configured People Planner solution as a starting point, you can re-arrange, add and hide fields and buttons to set up the view that fits your exact needs. It only requires a few drag-and-drop operations. Results are shown instantly, reducing the layout adjustment time.

Drag-and-drop also lets you arrange windows side by side or merge multiple windows into a multi-tab view for quick access to different types of information.

Benefits

- Easy configuration through drag-and-drop
- Rearrange, add and hide fields and buttons
- Add new calculation fields that multiply, subtract, divide or perform other operations on already existing fields
- Merge windows into one multi-tab view
- View changes instantly as you create them
- Create and distribute role-specific views to support individual processes
- Pre-define filters, grouping and sorting for each view
- Use own terminology using People Planner dictionaries

Optimise planning accuracy

Accurate and realistic planning is based on detailed information about available hours and skills.

With People Planner, you can set up various work hour models, for example full-time and part-time positions, as well as local work hour standards. You can use calendars to indicate national holidays and other events that impact work hours. Combined with employee-specific calendars that contain the employee's vacation time and other absences, this gives you an accurate picture of employee availability on any date for increased accuracy in planning and capacity calculations.

The built-in skills matrix lets you map the skills of your employees, which enables you to match resources against task requirements and find the right people for your tasks. You can define skills such as education, languages and certifications and assign them to employees along with a grading to indicate competence. If you add information about skill requirements to each task, you enable project managers to search for suitable employees for tasks – and resource managers can find tasks for employees with available time.

Benefits

- Create work hour models for different positions and locations
- Shared calendars for national holidays and other events
- Create multiple shared calendars for different locations
- Employee-specific calendars for personal vacation time and absences
- Synchronise employee skill information with Maconomy to avoid double entries
- Skills matrix with configurable grading system
- Search for skills to effectively match tasks and employees

Full graphical visibility and Excel-like Pivot tables

As an integrated part of the People Planner solution you get a full graphical reporting package. This enables you to create reports very similar to the ones you know as graphical charts in Excel.

Perspectives can be stored along with graphical reports. This means the report will automatically appear in an updated version the next time you log in.

The full pivot table functionality allows you to create the reports and views you prefer – based on the People Planner database.

- Insert graphical charts
- Store the graphical charts as part of a perspective to distribute them to different roles
- Insert pivot tables

Expanding with Maconomy

If you already have a Maconomy solution, People Planner can be integrated with Maconomy to ensure that all master data such as dimensions, employees, skills, calendars, locations, prices on employee categories and customers are easily synchronised. This ensures fast configuration and eliminates redundant data entries.

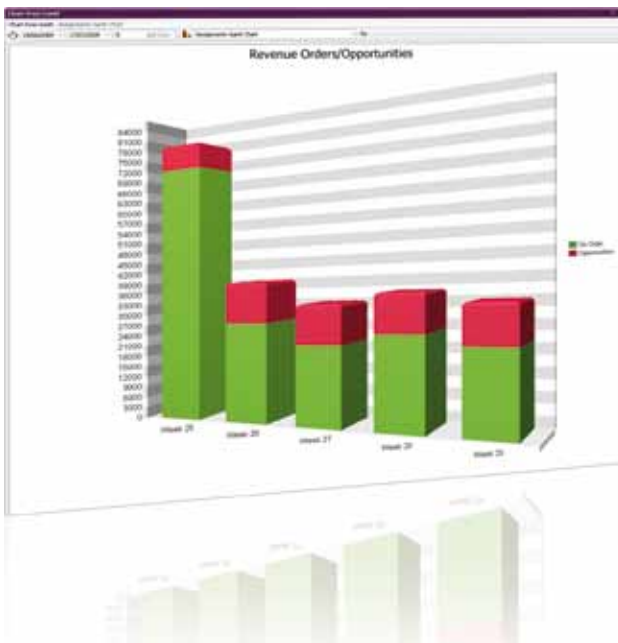
Projects created in Maconomy can be transferred to People Planner, complete with budgets and WBS. You can manage all plans in People Planner and synchronise at any time to update the project in Maconomy with the latest dates, actuals, budgets and Estimates To Completion – and vice versa.



Projects to which you are assigned in the resource plan will automatically appear in your time sheet.

If you have another ERP solution, you can either run People Planner as a stand-alone solution for project planning and resource management, or you can expand your solution with Time & Expense registration from Maconomy or a full ERP solution for Professional Services Organisations.

You can also integrate your People Planner solution to other ERP solutions or HR solutions to eliminate redundant data for resources, skills etc.



organic business solutions

Maconomy is a global provider of industry-specific business solutions for Professional Services Organisations. We create a natural relationship between people and processes in professional services organisations and provide the basis for overview, follow-up and decision-making in a way which ensures human as well as financial gain.

Our clients include Semcon, ErgoGroup, Devoteam, Deltares, Millward Brown and agencies within all of the big four global networks Interpublic Group, Omnicom Group, Publicis Groupe and WPP.

Maconomy A/S was founded in 1989 and the corporate headquarters is located in Copenhagen, Denmark. We service and support more than 600 clients in over 50 countries through our offices across Europe and in the U.S., and through an extensive partner network. Today more than 100,000 users worldwide use business solutions from Maconomy.

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