



Resource management and timesheet applications designed to operate in organizations using a mixture of desktop project management software and spreadsheets.

Innate Resource Manager v.6.17

Steve Cotterell revisits this resource management software company to bring our coverage of their products up-to-date.

Ipswich, one of England's oldest towns, grew up during the seventh and eight centuries around Ipswich dock on the River Orwell. Today, a stroll along its historic waterfront is a pleasant experience and the town is only minutes away from some of the prettiest Suffolk villages and countryside.

It's also the home of Innate Management Systems Ltd, a long-established software company with more than fifteen years' experience of implementing resource management software. PMT's first review of Innate software was in February 1994 and we've looked at their products several times since then. Now it's time, once again, to bring our coverage of their software up-to-date.

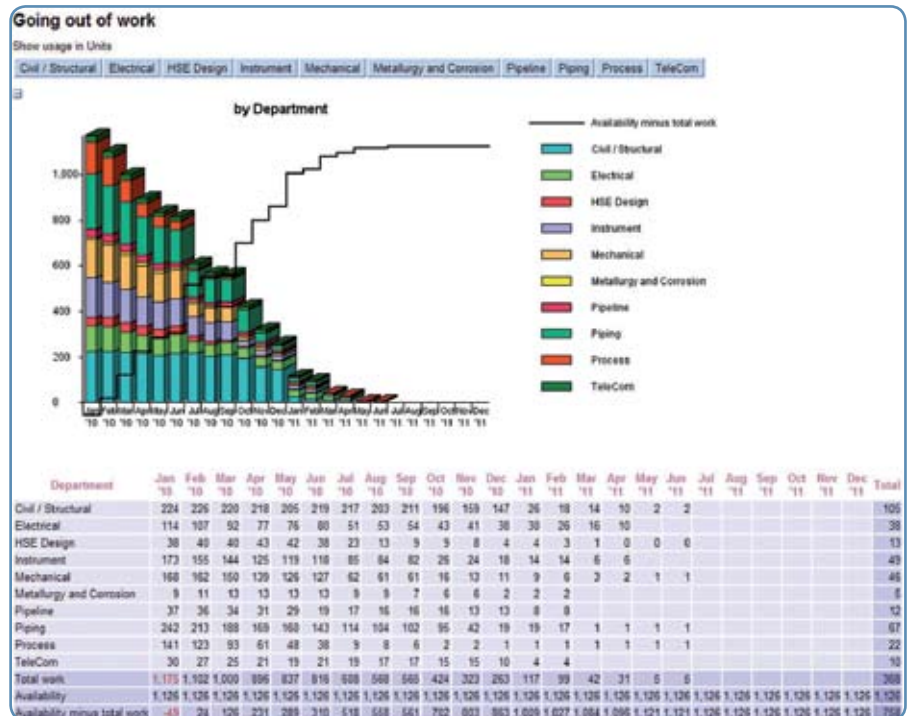
It's that rare breed, a British company selling its own software. Traditionally, clients have been IT-based, but Innate is now expanding to other markets. However, Innate doesn't see itself competing against the big enterprise project management software applications, but in the low to middle price range resource management applications.

The product has been designed to add value to multiple projects. It has even in some cases, such as Petrofac and Atkins, two recent clients, been used where resource management has been completely separated from project management.

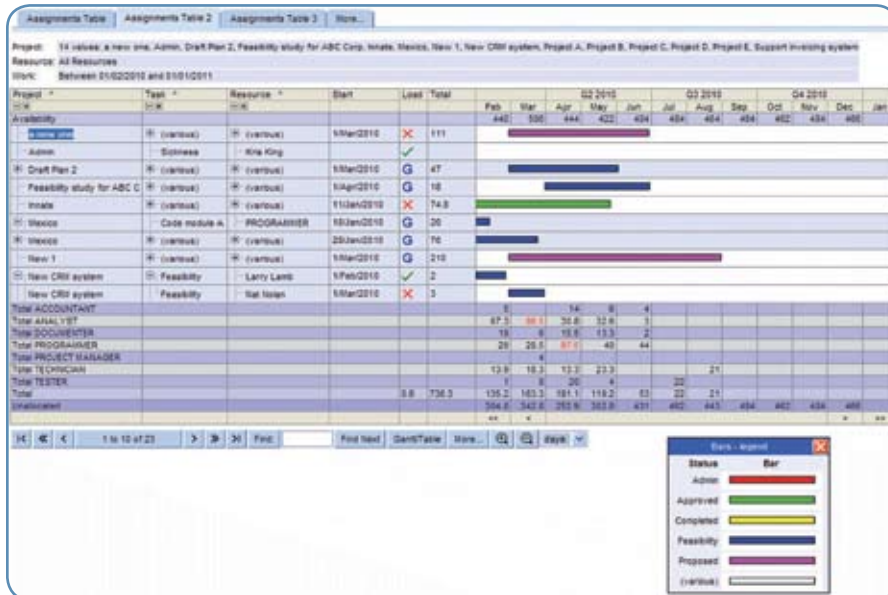
Communication support

The system has been designed to support communication between project managers, team leaders and resource managers. Innate claims that its system is easier to use and more quickly implemented than other resource management systems and will happily function in organizations that have a mixture of project management programs and spreadsheets. Resource names can be imported from HR systems and the product integrates with ERP systems.

The application supports a central (usually SQL Server or Oracle) database and any standard browser as its front-end. It's internet- or intranet-based and can be hosted by Innate, or on a



A report showing overloads and spare capacity; you can drill down to each department.



A Gantt view allowing the user to drag and drop whole projects or groups of related tasks to minimise overloads at team or skill level as shown at the bottom.

client's own server. Much of its functionality mimics that of a spreadsheet which can then be synchronised with all versions of MS Project. Work can be planned in either the browser or MS Project.

A timesheet system can be hung off Innate Resource Manager and actuals can be sent back to MS Project. Innate offer their own timesheet system, but Resource Manager will integrate with others. A reporting system has also been built into the product.

There is a strong link with MS Project, but this isn't now seen as the product's prime market. In the solution used by Petrofac, Atkins and others, Resource Manager is used as their resource planning system. However, it isn't linked to the details of individual projects, but is used at a higher level, across both proposals and projects, to get the 'big picture' at the corporate level.

There isn't really an out-of-the-box version of this product because it's individually configured for each client. This review has been carried out on a version of the product configured for a specific client. In fact, so much about this product is configurable, that I could waste a lot of time telling you how configurable it is. So, please just take my word for it that it is and I'll try not to mention it again.

Get started

The initial installation is carried out on Innate's servers. Client data is imported and the system is configured to the clients' needs. Then, when it's working properly, it can be moved to the client's server if required.

Once you've logged into the system using your username and password, you can see your personal home page, containing a Home Page Report.

This report can contain sets of graphs illustrating the resourcing situation on a group of projects or resources. Costings,

planned versus actuals, milestones, unassigned tasks and outstanding resource requests can all be shown on the home page.

To create a new project you'd use one of a number of templates stored in the system. The system allows a project to be copied and thereafter used as a template.

You set the start date and move to a screen featuring a set of tabs. The number of tabs, the field names, etc. are all configurable. Using the 'Project Details' tab you enter these – eg, project manager, project owner, status ('proposed' projects are catered for) and other basic information.

You can apply internal rates and billing rates which are held in rate tables. Different rates can be applied to different projects and the system can be used to monitor resource costs and charge out rates.

You now move to the 'Assignments Table'. The generic resource requirements will have been imported from the template, along with the effort budgets and relevant dates, and these are presented in a spreadsheet view. The effort data is stored in minute format but can be displayed as days/hours/percentage of work time or almost any other unit you require. The spreadsheet's time band can be divided into days/weeks/months and so on. Right-clicking on the spreadsheet allows you to edit it and to insert and delete tasks.

The spreadsheet can be colour-coded by the resource type, or by many other attributes. Columns can be inserted and hidden and a number of sorts can also be carried out.

At this point you have the option of viewing a report to see whether you have the resource capacity to carry out the proposed project. If not, you can switch to a table that shows what your resources are doing at the appropriate times. This can be displayed as a Gantt chart illustrating the time lines for each of your projects, and,

below that, subtotals showing the utilization of each resource type.

By dragging the Gantt bar representing a project backwards and forwards along the timeline you can watch the utilization figures at the foot of the screen change and, in this way, find out if it's possible to do the project, at any time, using existing resources.

It is quite likely that you will need to drop down a level to task level and, in the same way, move individual tasks backwards and forwards to find the spare capacity for their completion.

Dependencies aren't catered for and therefore it's possible to move a task backwards beyond its logical start date. However, where tasks depend on each other, they can be linked so that you move them back and forth together.

Once a feasible timescale for the project's been established, it's likely that you'd take a baseline. At present the system can accept five baselines but, by the time you read this, this should have been expanded.

The costing details of the proposed project will now appear in the systems cost reports and tasks in the project will, because they were just generic assignments, now appear in the 'Unassigned Tasks' report.

The approval process involves no more than changing the project's status from 'Proposed' to 'Approved' so your organisation would need to have its own process linked to the system. You can, however, set up the system's security permissions to determine who is allowed to make the status change.

Using the permissions function you can control who can see and do what in many areas of the system. Both individual and group permissions can be set, with individual permissions overriding group permissions.

The manager of any generic group of resources can see graphs to show the overall demand for his/her resources, as well as graphs showing individual workloads and then, by drilling down, see what each individual is working on.

They can also see a table of the tasks allocated solely against generic resources. They can go directly from this view to the Assignment Table for the appropriate project. By right-clicking on a role in that table they can choose the 'Replace Resource' option and, on the screen that appears, search on the resource skill or any other attribute. Because the system's so flexible, you can store as many resource attributes you wish.

In the list of names that appears as a result of your search, some names may have a red 'overloaded' or 'busy' against them. By clicking a radio button, you can select the resource to use (you can select a busy or overloaded resource if you need to) and, by pressing 'Save', assign that resource to the task, replacing the generic resource. If you need to, you can choose to split the work equally amongst several resources, or split it up to their



A spreadsheet view for a team leader allocating work to her team; the work for 'Analyst' still needs to be allocated to a real person.

remaining capacity. The radio buttons change to check boxes and you tick the resource names you wish to divide the work between. The resource names then appear in the Assignment Table and icons indicate their workload: a red cross means that they're overloaded, an amber triangle that they're busy but OK, and a green tick shows that they have more time available. You set the levels controlling these indicators as part of the system setup.

Resource managers can display a table showing the overall usage of the people in their teams. At the head of this table is a list of generic resources not yet assigned and, below that, a line for each individual shows the hours assigned during each day, week, etc, colour-coded to indicate the projects being worked on. Below that a table shows the same information in summary format. Each individual's line can be drilled into for lower level, task-based information.

If you right click a task on an individual's line and select 'Go to overload', a box opens showing the details of any work that person is assigned to which conflicts with that task. Clicking 'Show assignments' causes another box to open showing all their assignments within that period.

Even if an overload is shown, there's no compulsion to take any action. It's for the manager to decide whether the individual can cope or whether help will be required.

Other functions that can be done by right-clicking a resource include the assignment of recurring work - for example, a meeting held on the second Tuesday of each month.

To handle non-project work, one or more 'Admin' projects are created and people assigned to their holidays, etc. in that project. 'Business as usual' projects can also be established to contain routine tasks. Clicking a 'More' button enables the user to configure, summarise and sort the information on this screen to their own needs. The user can set up as many different versions of the screen as they like, which are accessed via different tabs - Assignments Table 1, 2, 3 etc.

From within the 'Manage Projects' or

'Manage Resources' screens you can create links to documents, including those held in SharePoint.

An individual resource may not have much access to the system, but their Home Page Report may show his/her planned workload in a 'What Am I Doing' table. Any overloads can be shown on this table, which can also be illustrated graphically.

Where time has already been spent on a project, a report of timesheet actuals can also be shown.

Project link

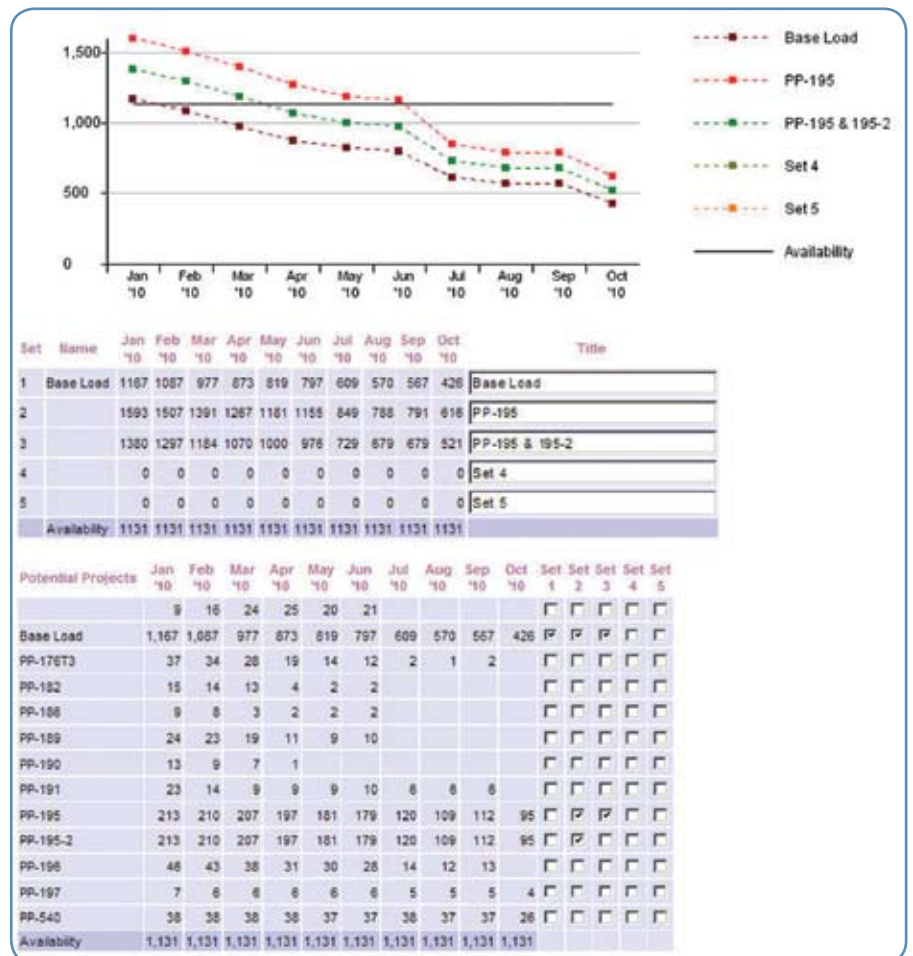
An add-in to MS Project is provided for those who wish to link the two applications. Using this connection you can replace resources assigned in MS Project with one from the Innate resource database, having made checks of their availability and skills set.

Where a project has been generically resourced in MS Project, the project can be synchronised with Resource Manager so that the generic resourcing appears in the Resource Manager Assignments Table. The generic resources can then be replaced by individuals within Resource Manager. These assignments can then be passed back to MS Project where they will henceforth appear.

To ensure that there's no disparity between the Innate and MS Project resource tables it's expected that users carry out all the main resource assignment via Resource Manager.

Once a project has been synchronized with MS Project, it then becomes the master scheduling tool and you can't then edit any of the task details from within Resource Manager, other than to change the resource assigned to any task.

You can create a scenario using the 'Manage Scenarios' function. Having created and named your scenario, all parts of the system and any changes you make are held in the scenario and don't affect the live data. You can make changes



This interactive report compares various scenarios showing the resource impact of adding successive new projects to the base load.

to projects where MS Project is the master although, when changes are made, they can't be sent back to the MS Project plan.

However, you can replace the live data in Resource Manager with the amended plan from the scenario. By adding permissions to the scenario, you can share it with other people.

Using the 'Scenario Report', a rather nice feature, you can compare the current situation with one or more saved scenarios. By clicking checkboxes you can add or remove projects from each scenario and watch, in real-time, the effect this has on the total workload.

The same process can be carried out at the lower, team level, where the effect of adding and removing projects can be shown on the team's workload.

The system contains a variety of tabular and graphical reports. These include a number of basic reports that the users (or Innate if necessary) can use to build tailored versions.

Organizations can also create a set of standard reports, held centrally and distributed to named users as required. These reports can be set up so that the information they gave is filtered to make them applicable to the recipient.

Innate Timesheets

This application facilitates individual web-based timesheets and the features that appear on the timesheets are configurable at the organization's discretion.

Any work planned for a person appears on

their timesheet and other tasks can be added from the database. In use, you enter your actuals and you can also add explanatory notes in little text boxes attached to each time box. Weekend work can be allowed and validation rules can be written.

The timesheet can be sent for approval and you can set up an approval process. Comment fields can be included to facilitate communication with the approver. Each line on the timesheet can be approved or rejected and, if a line is rejected, the timesheet is returned to the user with a comment.

The technology used in Timesheets is due to be upgraded so that it uses the same technology as Resource Manager. These changes should be available about the time you read this review.

Right to Reply

Innate is a well-established UK-based software author of products that help to optimise the utilization of skilled resources across projects and services. Our resource management software is particularly effective where organizations are struggling with spreadsheets, but want to avoid the disruption of over complex systems. Converting resource planning spreadsheets into Innate, makes project and resource data more consistent, user access controllable, and web based reports substantially improve communication.

With more than one hundred active clients, Innate operates across a number of Industry sectors, including consulting engineers, oil and gas, as well as those that manage IT projects.

When Petrofac, the Oil and Gas facilities provider, faced the challenge of continuously optimizing the utilization of their engineers, they turned to Innate. A geographically

dispersed workforce of 3,500 provides engineering services across many projects and proposals, each with its own timeline, priority and competency requirements.

For those that manage IT projects, we not only help to improve the utilization of the resource pool, but also to control the costs of individual Agile projects. Working alongside Agile tools that track issues, requirements and priorities, Innate helps to control project costs by planning and tracking the resources committed, through each review cycle.

*Barry Muir, Managing Director,
Innate Management Systems Ltd*

How much does it cost?

The product is priced according to the size of the resource pool, irrespective of how many people actually use the system. If someone just uses it to view reports, possibly a senior manager, then no charge is made for them.

Resource Manager plus Timesheets. In year one, the annual licence for these two products for a large organization with between 3,500 and 4,000 users would be about £100,000. The more usual system supplied to a medium-sized organization with about 100 users would cost about £33,000 including implementation.

Resource Manager only. To the same medium-sized organisation the year one price would be about £25,000.

Repeat licences cost 20% of the price of the year one license. All prices exclude VAT.

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