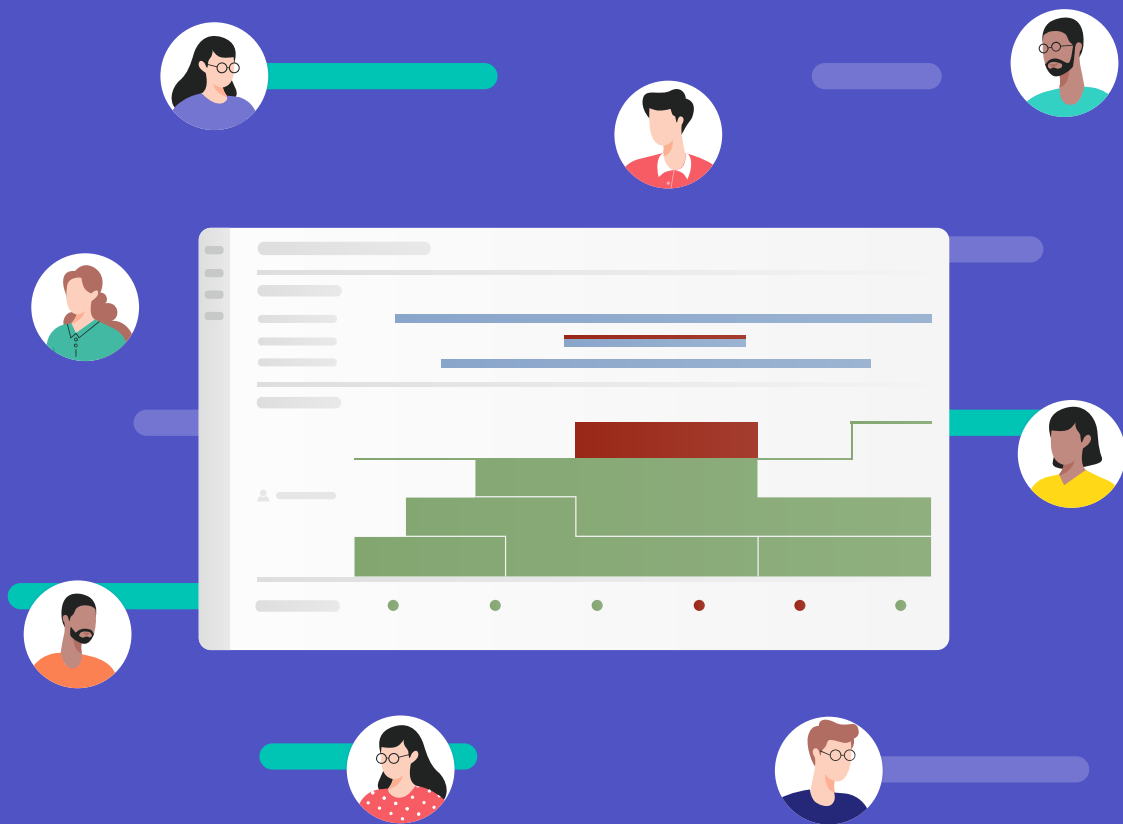




MEISTERPLAN

Resource Management

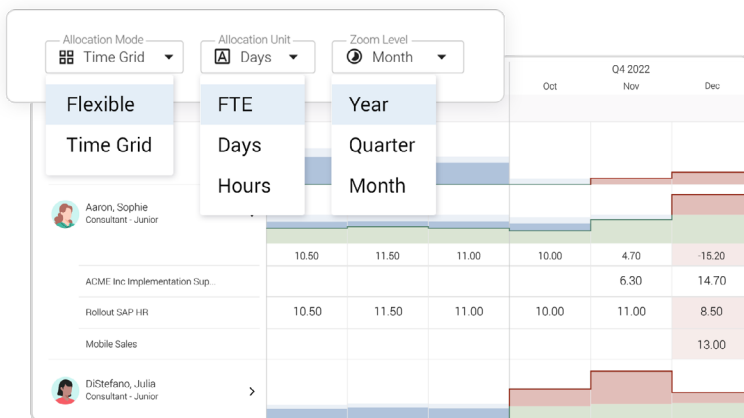
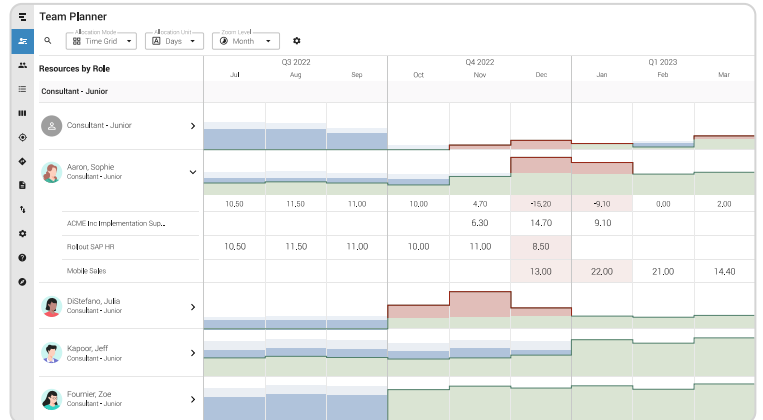
Realistic resource and capacity planning to keep your work on track and your employees happy.



Team Planner

Ensure the right employees are assigned to the right work without being overbooked.

- View resource availability and utilization in real time to realistically allocate resources.
- Identify and escalate resource over-allocations even before they occur.
- Resolve conflicts by adjusting allocations to replace resources or stretch efforts.



Easy Allocations

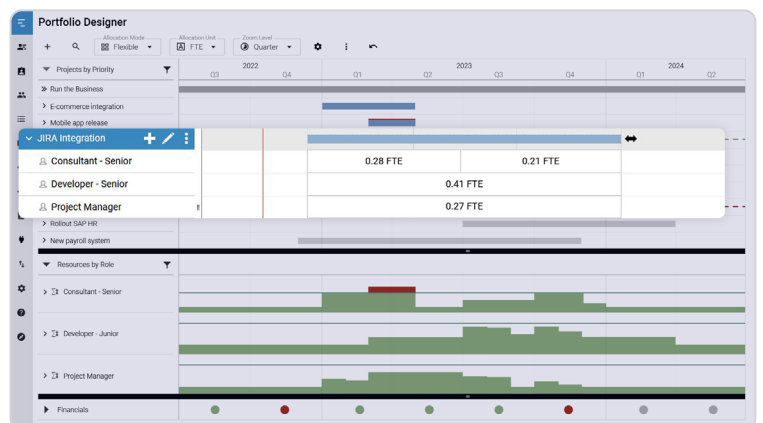
Allocate to the level you need when you need it.

- Plan with roles, teams or resources depending on the desired planning level.
- Allocate by full-time equivalent (FTE), days or hourly based on what fits your needs.
- Customizable allocation view options include a weekly, monthly or quarterly basis using the Grid or Compact mode.

Role-Based Planning

Use roles as a placeholder for individual employees.

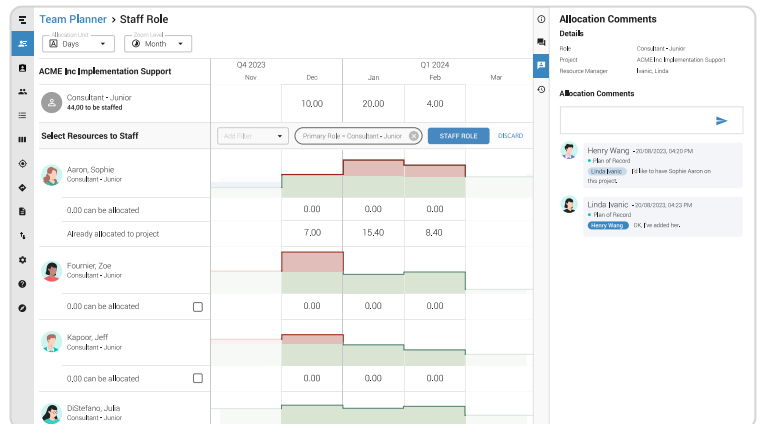
- Estimate and adjust effort needed for new demands based on roles.
- Allocate capacity to roles for planning purposes.
- Reserve role capacity across departments for cross-functional projects.



Staff Roles

Choose specific people who are the best fit for each project role.

- Choose individuals based on role, skills and availability.
- Use Allocation Comments to discuss and request specific people to staff on a project.
- Maximize resource utilization by matching the most qualified and available employees to the most important projects.



Rank Category	Resource Type	Allocation (%)						
Primary Role	Resource Name	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Apr 2024
> Consultant - Junior		91.53	112.28	108.44	79.89	40.00	40.00	40.20
> Consultant - Senior		46.87	81.16	117.22	104.02	86.55	83.38	75.95
> Developer - Junior		71.98	81.51	87.67	90.32	66.67	83.17	86.67
> Developer - Senior		79.89	95.13	106.22	99.09	86.55	99.89	83.22
> Project Manager		136.87	164.81	165.89	114.49	93.22	105.29	109.89
Grand Total		83.83	103.46	111.90	95.09	70.72	79.22	77.38

Capacity Reports

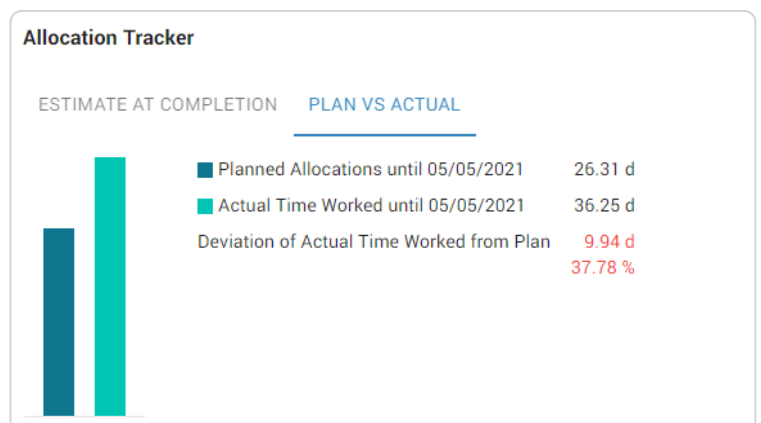
See at a glance which employees and teams are overloaded and who still has free capacity.

- Get a resource-centric view of your projects to understand how much remaining capacity is available.
- Quickly identify allocation issues using the allocation heatmap.
- Leverage pivot reports for custom resource analyses on the spot.

Plan vs. Actuals

Compare planned allocations and actual time worked to understand how your plan compares to reality.

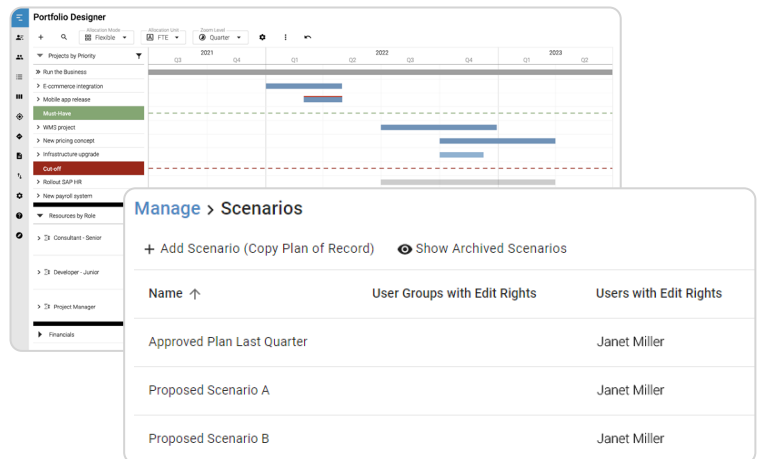
- Allow team members to enter their own actual time worked to ensure accurate data.
- Immediately determine when the actual time worked is deviating from the planned effort.
- Continuously improve the accuracy of your resource planning.



Resource Scenario Planning

Test options to resolve resource bottlenecks.

- Instantly see and test alternatives for employees who are overbooked or projects that need more capacity.
- Simulate ways to maximize your resource utilization.
- Use scenarios to reliably plan and communicate on-time delivery, without overbooking resources.



Portfolio Designer

Manage > Scenarios

+ Add Scenario (Copy Plan of Record) Show Archived Scenarios

Name ↑	User Groups with Edit Rights	Users with Edit Rights
Approved Plan Last Quarter		Janet Miller
Proposed Scenario A		Janet Miller
Proposed Scenario B		Janet Miller

Resource Pool

RESOURCES ROLES

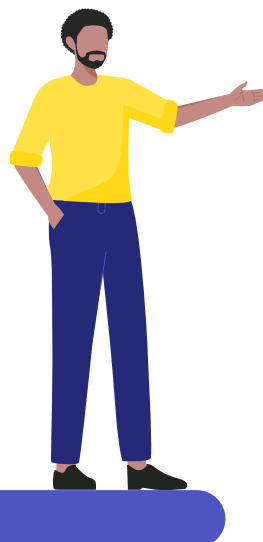
+ Add Resource Search Filter Configure Columns Export to Excel

Name ↑	Primary Role	Department	Office	External Resource	Calendar
Aaron, Sophie	Consultant - Junior	Professional Services > Consulting	Chicago		USA
Fournier, Zoe	Consultant - Junior	Professional Services > Consulting	Chicago		USA
Kapoor, Jeff	Consultant - Junior	Professional Services > Consulting	Chicago		USA
DiStefano, Julia	Consultant - Junior	Professional Services > Consulting	Chicago		USA
García López, Dolores	Consultant Senior	Professional Services > Consulting	Chicago		USA
Lee, Harriet	Developer - Junior	Software Engineering > Client	Seattle		USA
Kumar, Rishan	Developer - Junior	Software Engineering > Architecture	Seattle		USA
Mukherjee, Rajiv	Consultant - Junior	Professional Services > Consulting	Chicago	✓	USA

Resource Data

See and edit information on employees and their availabilities.

- Import employee data directly from your HR software.
- Capture capabilities, departments, costs and working hours of internal and external resources.
- Enter individual absences such as vacation, sick time and business trips.



Get in Touch

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