



# regoUniversity

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# The Most Powerful Add-on for Professional Resource Planning

Bianca Hartwich & Nora Schlipfenbacher



# Why Advanced Resource Planning?

Clarity handles basic resource planning well.



itd Advanced Resource Planning

adds **extra functionality and features** for professional resource planning!



# Add-on for Professional Resource Planning in Clarity

itd Advanced Resource Planning: Features & Benefits

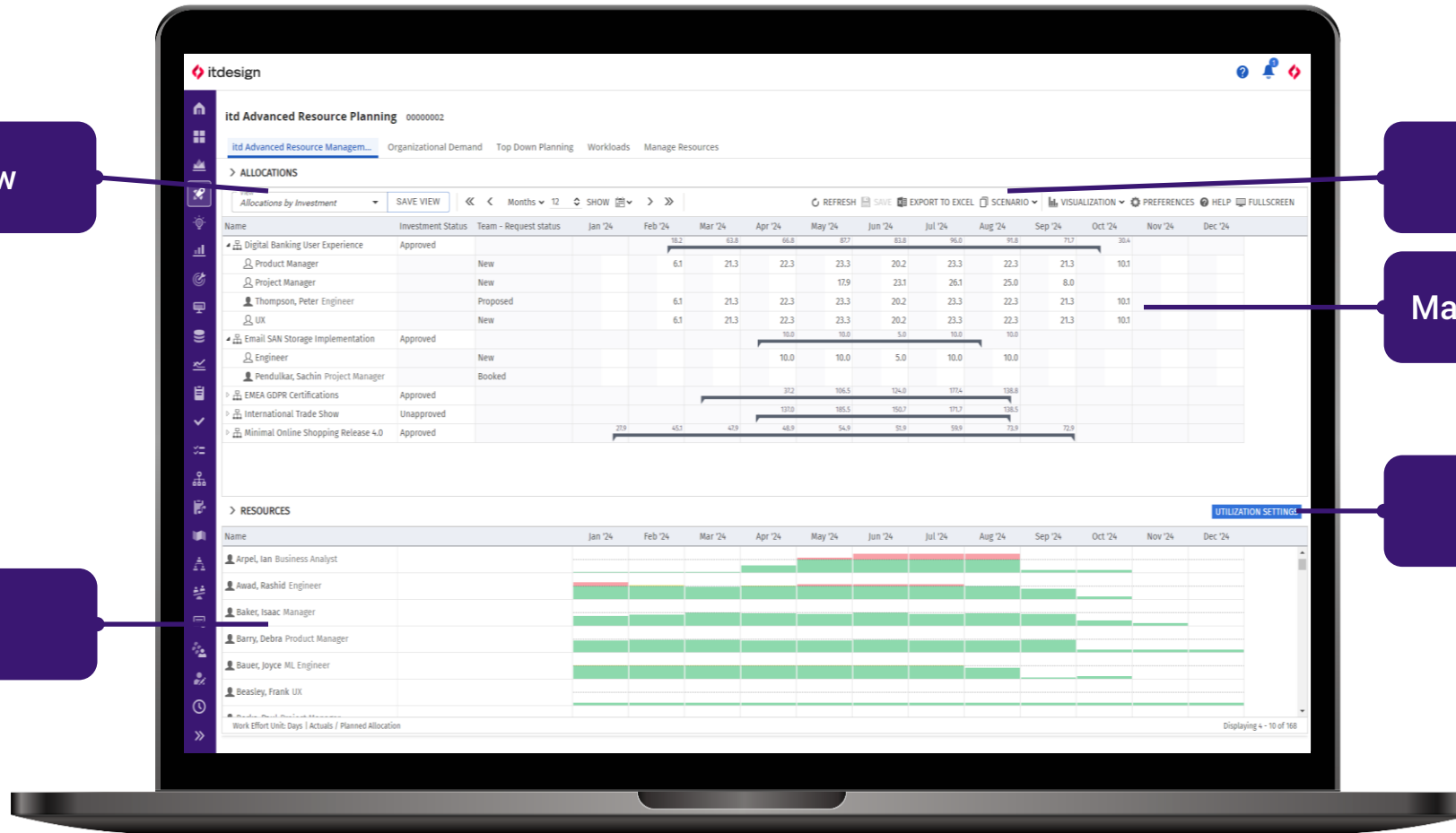
Customized View

Scenario Planning

Maximum Transparency

Drag and Drop

Extensive Filtering Options





# 1



**All Information at a Glance**

itd Advanced Resource Planning 00000002

itd Advanced Resource Managem... Organizational Demand Top Down Planning Workloads Manage Resources

> ALLOCATIONS

View: My Top Projects [SAVE VIEW] [Navigation icons] Months: 15 [SHOW] [Calendar icon] [Navigation icons]

REFRESH [SAVE] [EXPORT TO EXCEL] [SCENARIO] [VISUALIZATION] [PREFERENCES] [HELP] [FULLSCREEN]

Name	Investment - Rank	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25	Okt. '25	Nov. '25
▶ Omnichannel Integration	1	19	74	67	70	74	64	67	70	70	67	74	3			
▶ CRM Upgrade	2		20	49	50	38										
Architect			6	6	7	6										
Berks, Paul Project Manager			4	11	12	9										
Bernard, Luc Project Manager			3	9	9	7										
Childers, Valerie Architect			4	11	10	7										
Quinn, Randy Business Analyst			4	11	12	9										
▶ BI Reporting Tool	3	31	41	41	41											
▶ Digital Workforce Evolution	4						35	47	48	63	67	74	67	70	74	32
▶ AI-Powered Transformation	5	138	149	128	131	135	116									

> RESOURCES

[SHOW UTILIZATION FILTER] [UTILIZATION SETTINGS]

Name	Location	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25	Okt. '25	Nov. '25
Arpel, Ian Business Analyst																
Berks, Paul Project Manager	Chicago															
Bernard, Luc Project Manager	Paris															
Childers, Valerie Architect	New York															
Coleman, Joyce Architect	New York															
Dixon, Danielle Architect																
Granger, Paula Project Manager	New York															

# 2



## Resolving Bottlenecks

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#### > ALLOCATIONS

View: My Top Projects

Months: 15

SHOW [Grid Icon]

REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Investment Stat...	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
ABLE Payments Module	Approved	200	222	189	199	221	55							
BI Reporting Tool	Approved	28			30									
CRM Upgrade	Approved		8	4	43	44								
Digital Banking User Experience	Approved						10	42	44	74	78	74	62	
DPM Loan App Rel 6.0	Approved	48	70	73	73	89	106	112	160	147				

Start: Sa., 26.10.2024  
Finish: Do., 30.01.2025

#### > RESOURCES

SHOW UTILIZATION FILTER UTILIZATION SETTINGS

Name	Location	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
Arpel, Ian Business Analyst														
Berks, Paul Project Manager	Chicago													
Bernard, Luc Project Manager	Paris													
Childers, Valerie Architect	New York													
Coleman, Joyce Architect	New York													
Dixon, Danielle Architect														
Granger, Paula Project Manager	New York													

Work Effort Unit: Days | Actuals / Planned Allocation

Displaying 1 - 7 of 31



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> ALLOCATIONS

View: My Top Projects SAVE VIEW ◀ Months 15 SHOW REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Investment Status	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
Omnichannel Integration	Approved	19	74	67	70	74	64	67	70	70	67	74	3	
CRM Upgrade	Approved					42	56	39	18					
BI Reporting Tool	Approved	31	41	41	41									
Digital Workforce Evolution	Approved						35	47	48	63	67	74	67	70
AI-Powered Transformation	Approved	138	149	128	131	135	116							

> RESOURCES

SHOW UTILIZATION FILTER UTILIZATION SETTINGS

Name	Location	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
Arpel, Ian Business Analyst														
Berks, Paul Project Manager	Chicago													
Bernard, Luc Project Manager	Paris													
Childers, Valerie Architect	New York													
Coleman, Joyce Architect	New York													
Dixon, Danielle Architect														

# 3



**Find the Right Candidate**

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## > ALLOCATIONS

View: My Top Projects

Months: 15

REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Investment Stat...	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
ABLE Payments Module		200	222	189	199	221	55							
BI Reporting Tool		28	45	41	30									
Architect		7	11	10	7									
Business Analyst		7	11	10	7									
Project Manager		7	11	10	7									
Security Architect		7	11	10	7									
CRM Upgrade					11	35	31	33	26					
Digital Banking User Ex							10	42	44	74	78	74	62	

- Open Properties
- Create Requisition
- Allocate from Estimates
- Commit Planned Allocation
- Accept Hard Allocation
- Delete
- Show candidates (by Role, OBS and Skills)

Find the right candidate

## > RESOURCES

SHOW UTILIZATION FILTER UTILIZATION SETTINGS

Name	Location	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
Sauer, Jason Business Analyst	New York													
Smith, Kevin Security Architect	New York													
Stewart, Diane Business Analyst	New York													
Architect														
Business Analyst														
Project Manager														
Security Architect														

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> ALLOCATIONS

View: My Top Projects | Navigation: Months 15 | Actions: REFRESH, SAVE, EXPORT TO EXCEL, SCENARIO, VISUALIZATION, PREFERENCES, HELP, FULLSCREEN

Name	Investment Stat...	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
▶ ABLE Payments Module	Approved	200	222	189	199	221	55							
▶ Reporting Tool ***	Approved	28	45	41	30									
▶ CRM Upgrade	Approved				3	36	32	34	32					
▶ Digital Banking User Experience	Approved						10	42	44	74	78	74	62	
▶ DPM Loan App Rel 6.0	Approved	48	70	73	73	89	106	112	160	147				

> RESOURCES

SHOW UTILIZATION FILTER UTILIZATION SETTINGS

Name	Location	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
Arpel, Ian Business Analyst														
Berks, Paul Project Manager	Chicago													
Bernard, Luc Project Manager	Paris													
Childers, Valerie Architect	New York													
Coleman, Joyce Architect	New York													
Dixon, Danielle Architect														
Granger, Paula Project Manager	New York													

Work Effort Unit: Days | Actuals / Planned Allocation

Displaying 1 - 7 of 31



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## > ALLOCATIONS

View: My Top Projects

Navigation: << < Months 15 SHOW > >>

Actions: REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Investment Stat...	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
ABLE Payments Module	Approved	200	222	189	199	221	55							
BI Reporting Tool		28	45	41	30									
Architect		7	11	10	7									
Business Analyst		7	11	10	7									
Security Architect		7	11	10	7									
Sutherland, Joy Engineer		7	11	10	7									
CRM Upgrade					3	36	32	34	32					
Digital Banking User Experience							10	42	44	74	78	74	62	

- Open Properties
- Create Requisition
- Allocate from Estimates
- Commit Planned Allocation
- Accept Hard Allocation
- Delete
- Unstaff to Effective Role

Take the resource from the role

## > RESOURCES

SHOW UTILIZATION FILTER UTILIZATION SETTINGS

Name	Location	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
Granger, Paula Project Manager	New York													
Martin, Paul Project Manager	New York													
Sutherland, Joy Engineer	New York													
Tanner, Paul Product Owner	Chicago													
Project Manager														

# 4

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## How to Work with Availabilities

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> ALLOCATIONS

View: My Top Projects

Months: 15

REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Investment Status	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25	Okt. '25	Nov. '25
AI-Powered Transformation	Approved	131	140	118	123	129	113									
BI Reporting Tool	Approved	45	49	50	47											
CRM Upgrade	Approved					43	50	44	20							
Digital Workforce Evolution	Approved						35	47	48	63	67	74	67	70	74	3
Omnichannel Integration	Approved	19	74	67	70	74	64	67	70	70	67	74	3			

> RESOURCES

SHOW UTILIZATION FILTER UTILIZATION SETTINGS

Name	Location	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25	Okt. '25	Nov. '25
Arpel, Ian Business Analyst																
Berks, Paul Project Manager	Chicago															
Bernard, Luc Project Manager	Paris															
Childers, Valerie Architect	New York															
Coleman, Joyce Architect	New York															
Dixon, Danielle Architect																
Granger, Paula Project Manager	New York															
Lily, Lily Project Manager	Chicago															
Hayes, Justin Architect	Chicago															

5

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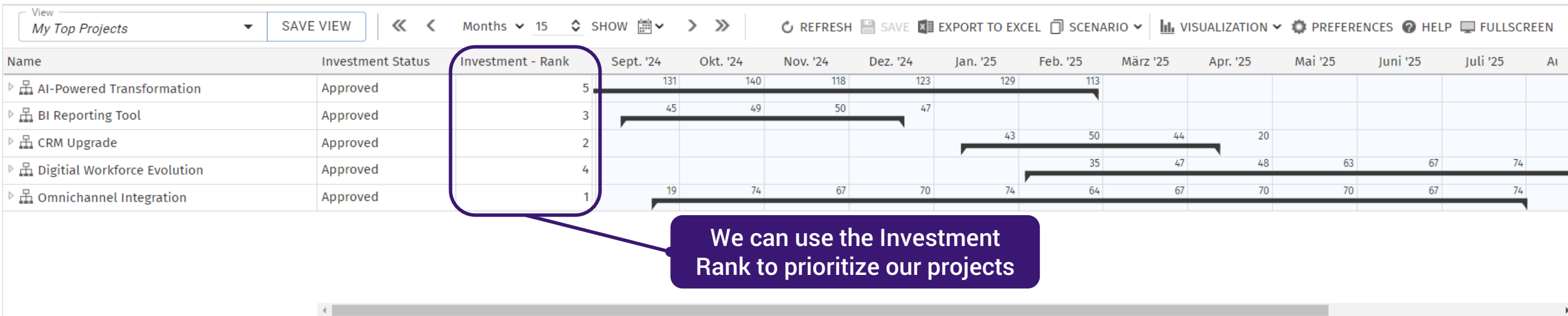
**Ranking of Investments**



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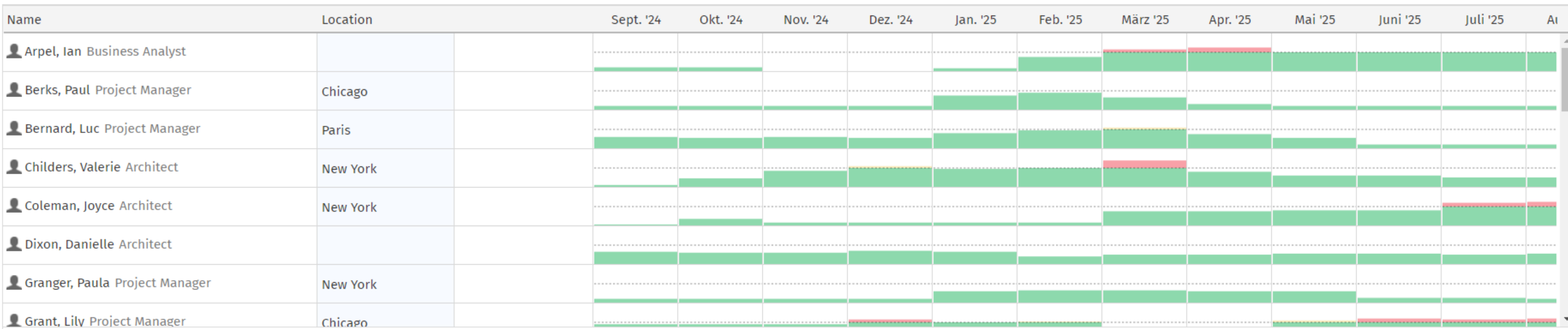
## > ALLOCATIONS



We can use the Investment Rank to prioritize our projects

## > RESOURCES

SHOW UTILIZATION FILTER UTILIZATION SETTINGS



Work Effort Unit: Days | Actuals / Planned Allocation

Displaying 1 - 8 of 31

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> ALLOCATIONS

View: My Top Projects [SAVE VIEW] [Navigation] Months: 15 [SHOW] [Refresh] [Save] [Export to Excel] [Scenario] [Visualization] [Preferences] [Help] [Fullscreen]

Name	Investment Status	Investment - Rank	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25
Omnichannel Integration	Approved	1	19	74	67	70	74	64	67	70	70	67	74	
CRM Upgrade	Approved	2					43	50	44	20				
BI Reporting Tool	Approved	3	45	49	50	47								
Digital Workforce Evolution	Approved	4						35	47	48	63	67	74	
AI-Powered Transformation	Approved	5	131	140	118	123	129	113						

> RESOURCES

[SHOW UTILIZATION FILTER] [UTILIZATION SETTINGS]

Name	Location	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25
Arpel, Ian Business Analyst													
Berks, Paul Project Manager	Chicago												
Bernard, Luc Project Manager	Paris												
Childers, Valerie Architect	New York												
Coleman, Joyce Architect	New York												
Dixon, Danielle Architect													
Granger, Paula Project Manager	New York												
Grant, Lilv Project Manager	Chicago												

Work Effort Unit: Days | Actuals / Planned Allocation

Displaying 1 - 8 of 31

# 6



**Check Your Roles Capacities**

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> ALLOCATIONS

SHOW UTILIZATION FILTER UTILIZATION SETTINGS

View: My Architects [Navigation icons: back, forward, months, show, calendar]

[Refresh, Print, Export, Copy, Chart, Settings, Help, Monitor icons]

Name	Start	Finish	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25
Architect	14.03.2023	29.08.2025	35,0 / 0,0	32,0 / 0,4	15,0 / 58,1	29,0 / 0,0	25,0 / -10,0	25,0 / -18,0	55,0 / -34,0	55,0 / -23,0	35,0 / -17,0
Childers, Valerie Architect	01.01.2024	31.08.2025	17,0 / 4,0	17,0 / 6,0	17,0 / 4,0	22,0 / 0,0	22,0 / 1,0	22,0 / -2,0	22,0 / -1,0	22,0 / 0,0	12,0 / 10,0
Coleman, Joyce Architect	13.05.2024	16.06.2026	11,0 / 10,0	17,6 / 5,4	16,9 / 4,1	23,0 / -1,0	23,0 / 0,0	18,0 / 2,0	18,0 / 3,0	18,0 / 4,0	18,0 / 4,0
Dixon, Danielle Architect	05.03.2024	11.09.2025	3,0 / 18,0	12,0 / 11,0	12,0 / 9,0	20,0 / 2,0	20,0 / 3,0	20,0 / 0,0	20,0 / 1,0	20,0 / 2,0	23,0 / -1,0
Hayes, Justin Architect	03.01.2023	31.08.2025	9,0 / 12,0	9,0 / 14,0	9,0 / 12,0	22,0 / 0,0	22,0 / 1,0	22,0 / -2,0	22,0 / -1,0	22,0 / 0,0	22,0 / 0,0
McKay, Erin Architect	09.05.2023	31.12.2025	23,0 / -2,0	25,0 / -2,0	2,0 / 19,0	22,0 / 0,0	27,0 / -4,0	17,0 / 3,0	17,0 / 4,0	17,0 / 5,0	39,0 / -17,0
Morris, Tom Architect	10.06.2023	01.09.2025	21,0 / 0,0	22,0 / 1,0	19,0 / 2,0	19,0 / 3,0	21,0 / 2,0	20,0 / 0,0	24,0 / -3,0	21,0 / 1,0	20,0 / 2,0
Oliva, Vince Architect	01.09.2024	28.02.2025	25,0 / -4,0	25,0 / -2,0	15,0 / 6,0	15,0 / 7,0	15,0 / 8,0	15,0 / 5,0	5,0 / 16,0	5,0 / 17,0	5,0 / 17,0
Ramos, Adriana Architect	01.09.2024	31.08.2025	24,0 / -3,0	24,0 / -1,0	4,0 / 17,0	4,0 / 18,0	19,0 / 4,0	19,0 / 1,0	19,0 / 2,0	19,0 / 3,0	19,0 / 3,0

DETAILS



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> ALLOCATIONS

SHOW UTILIZATION FILTER UTILIZATION SETTINGS

View My Architects Months 12 SHOW

Refresh, Print, Copy, Filter, Settings, Help icons

Name	Start	Finish	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25
Architect	14.03.2023	29.08.2025	35,0 / 0,0	32,0 / 0,4	15,0 / 58,1	29,0 / 0,0	25,0 / -10,0	25,0 / -18,0	55,0 / -34,0	55,0 / -23,0	35,0 / -17,0
BI Reporting Tool	11.09.2024	21.12.2024	10,0	7,0	10,0	19,0					
Collaboration Showcase	05.03.2025	17.06.2025							20,0	20,0	20,0
CRM Upgrade	23.12.2024	22.04.2025				5,0	5,0	5,0	5,0	5,0	
EMEA GDPR Certifications	09.03.2025	29.08.2025							15,0	15,0	15,0
Green IT Initiative	01.09.2024	28.02.2025	5,0	5,0	5,0	5,0	5,0	5,0			
New Online Application	01.09.2024	31.10.2024	20,0	20,0							
Sustainable Project (ESG conform)	16.01.2025	29.04.2025					15,0	15,0	15,0	15,0	
Childers, Valerie Architect	01.01.2024	31.08.2025	17,0 / 4,0	17,0 / 6,0	17,0 / 4,0	22,0 / 0,0	22,0 / 1,0	22,0 / -2,0	22,0 / -1,0	22,0 / 0,0	12,0 / 10,0
Coleman, Joyce Architect	13.05.2024	16.06.2026	11,0 / 10,0	17,6 / 5,4	16,9 / 4,1	23,0 / -1,0	23,0 / 0,0	18,0 / 2,0	18,0 / 3,0	18,0 / 4,0	18,0 / 4,0
Dixon, Danielle Architect	05.03.2024	11.09.2025	3,0 / 18,0	12,0 / 11,0	12,0 / 9,0	20,0 / 2,0	20,0 / 3,0	20,0 / 0,0	20,0 / 1,0	20,0 / 2,0	23,0 / -1,0
Hayes, Justin Architect	03.01.2023	31.08.2025	9,0 / 12,0	9,0 / 14,0	9,0 / 12,0	22,0 / 0,0	22,0 / 1,0	22,0 / -2,0	22,0 / -1,0	22,0 / 0,0	22,0 / 0,0
McKay, Erin Architect	09.05.2023	31.12.2025	23,0 / -2,0	25,0 / -2,0	2,0 / 19,0	22,0 / 0,0	27,0 / -4,0	17,0 / 3,0	17,0 / 4,0	17,0 / 5,0	39,0 / -17,0
Morris, Tom Architect	10.06.2023	01.09.2025	21,0 / 0,0	22,0 / 1,0	19,0 / 2,0	19,0 / 3,0	21,0 / 2,0	20,0 / 0,0	24,0 / -3,0	21,0 / 1,0	20,0 / 2,0
Oliva, Vince Architect	01.09.2024	28.02.2025	25,0 / -4,0	25,0 / -2,0	15,0 / 6,0	15,0 / 7,0	15,0 / 8,0	15,0 / 5,0	5,0 / 16,0	5,0 / 17,0	5,0 / 17,0
Ramos, Adriana Architect	01.09.2024	31.08.2025	24,0 / -3,0	24,0 / -1,0	4,0 / 17,0	4,0 / 18,0	19,0 / 4,0	19,0 / 1,0	19,0 / 2,0	19,0 / 3,0	19,0 / 3,0

DETAILS

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# itd Advanced Resource Planning 00000002

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## > ALLOCATIONS

SHOW UTILIZATION FILTER UTILIZATION SETT

View: My Architects

Navigation: << < Months 12 SHOW > >>

Actions: Refresh, Print, Export, Filter, Settings, HELP

Name	Start	Finish	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25
Architect	14.03.2023	27.02.2026	63,4 / 32,6	89,2 / -34,8	96,4 / -52,4	82,0 / -43,0	83,0 / -28,9	73,9 / -30,9	93,6 / -81,8	104,3 / -39,5	92,4 / -31,1
Childers, Valerie Architect	01.09.2023	30.11.2025	2,0 / 19,0	10,0 / 13,0	17,0 / 4,0	24,0 / -2,0	21,5 / 1,5	20,0 / 0,0	28,4 / -7,4	16,9 / 5,1	12,9 / 9,1
Coleman, Joyce Architect	14.03.2025	16.06.2026	1,0 / 20,0	7,6 / 15,4	3,0 / 18,0	3,0 / 19,0	3,0 / 20,0	3,0 / 17,0	15,0 / 6,0	15,9 / 6,1	17,1 / 4,9
Dixon, Danielle Architect	01.12.2023	30.11.2025	13,0 / 8,0	22,0 / 1,0	17,0 / 4,0	20,0 / 2,0	23,0 / 0,0	17,0 / 3,0	19,4 / 1,6	19,9 / 2,1	11,7 / 10,3
Hayes, Justin Architect	03.01.2023	30.11.2025	4,0 / 17,0	19,0 / 4,0	19,0 / 2,0	19,0 / 3,0	19,0 / 4,0	19,0 / 1,0	31,0 / -10,0	16,9 / 5,1	18,1 / 3,9
McKay, Erin Architect	08.05.2024	31.12.2025	12,0 / 9,0	12,0 / 11,0	12,0 / 9,0	12,0 / 10,0	17,0 / 6,0	17,0 / 3,0	25,5 / -4,5	26,8 / -4,8	40,7 / -18,7
Morris, Tom Architect	01.11.2022	08.07.2026	21,0 / 0,0	22,0 / 1,0	25,0 / -4,0	25,0 / -3,0	10,0 / 13,0	4,0 / 16,0	8,0 / 13,0	5,8 / 16,2	5,1 / 16,9
Oliva, Vince Architect	01.08.2024	27.02.2026	5,0 / 16,0	23,0 / 0,0	22,0 / -1,0	25,0 / -3,0	27,4 / -4,4	28,0 / -8,0	25,0 / -4,0	5,0 / 17,0	5,0 / 17,0
Ramos, Adriana Architect	01.08.2024	08.07.2026	14,0 / 7,0	14,0 / 9,0	9,0 / 12,0	9,0 / 13,0	9,0 / 14,0	9,0 / 11,0	4,0 / 17,0	4,0 / 18,0	4,0 / 18,0

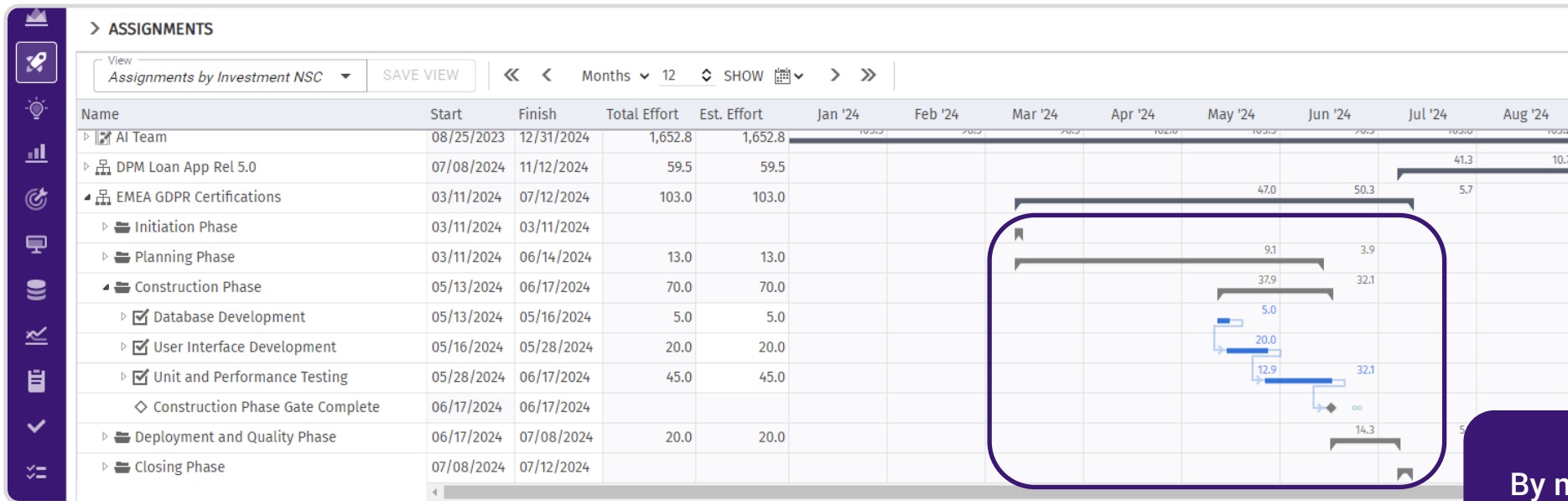


0:00

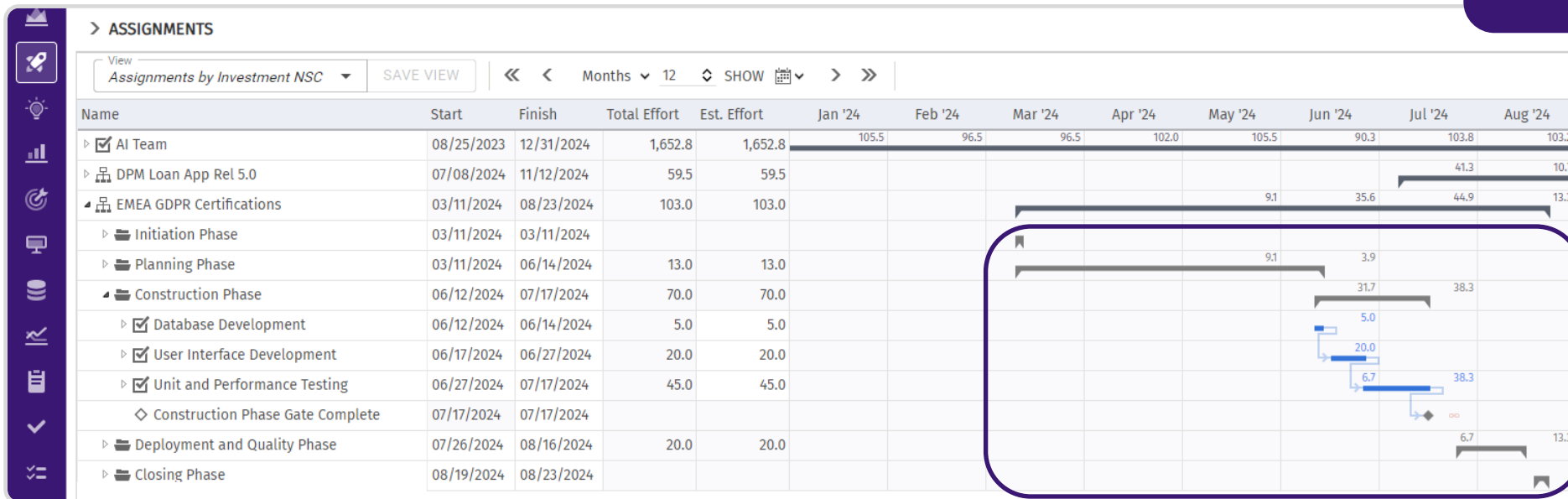
# 7



## Staffing of Assignments



By moving a phase, all related tasks are moved as well



# 8



**Consider Resources within Roadmaps**

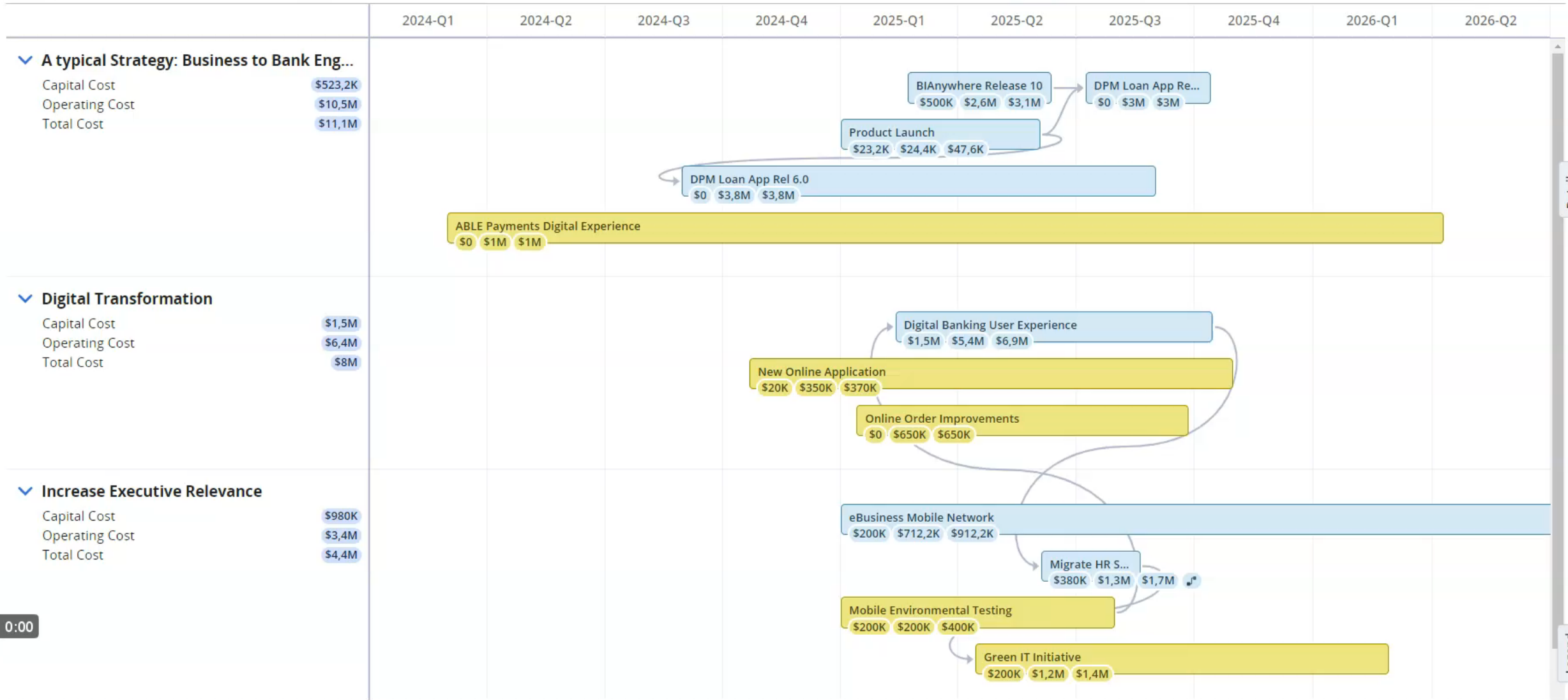
### Fiscal Plan - Ideas and Projects 2025 RD00030

Roadmap Items | Resource Levelling | Properties | Checklists

Scenario: New scenario

Search...

View: In Plan - Not in Plan | Save | Settings



Roadmap ▾

### Fiscal Plan - Ideas and Projects 2025 RD00030

Roadmap Items **Resource Levelling** Properties Checklists

#### > ALLOCATIONS

View: **Bottleneck Resources** [SAVE VIEW] [Navigation icons] Quarters: 10 [SHOW] [Refresh] [SAVE] [VISUALIZATION] [PREFERENCES] [HELP] [FULLSCREEN]

Name	Investment Stat...	Start	Finish	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026	Q3 2026	Q4 2026
Digital Banking User Experi	Approved	12.02.2025	15.10.2025			124	146	147	9				
	Approved	23.10.2025	25.06.2026						161	143	122		
eBusiness Mobile Network	Approved	01.01.2025	10.09.2026			52	53	84	122	211	218	119	
	Approved	01.01.2025	10.09.2026			52	53	84	122	211	218	119	
DPM Loan App Rel 6.0	Approved	29.08.2024	31.08.2025	113	299	409	383	15					
	Approved	29.08.2024	31.08.2025	113	299	409	383	15					
BIAnywhere Release 10	Approved	21.02.2025	11.06.2025			123	143						
	Approved	21.02.2025	11.06.2025			123	143						
Migrate HR Services to SaaS	Approved	04.06.2025	19.08.2025				59	46					
	Approved	04.06.2025	19.08.2025				59	46					
Product Launch	Unapproved	01.01.2025	03.06.2025			164	146						
	Unapproved	01.01.2025	03.06.2025			164	146						
DPM Loan App Rel 5.0	Approved	08.07.2025	13.10.2025					91	29				

#### > RESOURCES

[SHOW UTILIZATION FILTER] [UTILIZATION SETTINGS]

Name	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026	Q3 2026	Q4 2026
Product Manager										
QA										
Solutions Marketing										

[Pause icon] 0:00



# 9



## Resource Utilization within Hierarchies

## Hierarchies



Search...



View Default

Save



Select all Deselect all

Group By

Starred	Hierarchy Name <span>★ ↑</span>	Description	Status
<input type="checkbox"/>	ART Risk and Status Overview	Includes all ARTs and is used to get an overview of them and the corresponding risks and status	Open
<input type="checkbox"/> ★	Banking Portfolio Hierarchy	Shows the Portfolio with all its subportfolios and projects.	Closed
<input type="checkbox"/>	BSR Retail Banking Product Line	Product Line Hierarchy for Retail Banking Product Family	Open
<input type="checkbox"/>	Business Bank Engagement Value Stream	Business Bank Engagement	Planning
<input type="checkbox"/>	Business Capability Mapping	Enterprise view into Business Capability map to supporting Components	Planning
<input type="checkbox"/>	Chain of Why	Includes all relevant Investments corresponding to the Overall Strategy	Closed
<input type="checkbox"/>	Cloud Transformation Program	Hierarchy of Projects	On Hold
<input type="checkbox"/> ★	Enterprise Strategy	Enterprise Strategy with underpinning Objectives as well as Initiatives aligned to the Objectives	Open
<input type="checkbox"/> ★	Global Compliance Program	Program Hierarchy	Open
<input type="checkbox"/> ★	My Projects	Overview of Danas Projects including KPIs and important things for daily work.	Open
<input type="checkbox"/>	Overview of all Epics and Dependencies	Includes all relevant EPICs and is used to get an overview of them and the corresponding depende...	Open
<input type="checkbox"/> ★	Product and Releasemanagement	Hierarchy of Retail Banking Product Line and Products grouped by Releases	Open
<input type="checkbox"/>	Sustainability Value Stream	Hierarchy for Sustainability initiatives	On Hold



Columns  
Details

Hierarchy ▾

## Global Compliance Program H0000003

Investments **itd Advanced Resource Planning** Financials Tasks Staff Risks Status Changes Issues Dashboard Lessons Learned Conversations Properties

### > ALLOCATIONS

View: Allocations by Investment

Months: 12

SHOW [Grid Icon]

Name	Start	Finish	Hierarchy Level	Investment - Priority	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25
📁 Global Compliance Program	01.04.2024	31.12.2025		1 30,0	67,0	65,0	67,0	48,0	63,0	61,0	77,0	79,0
👤 Project Manager	01.04.2024	31.12.2025			20,0	18,0	20,0	19,0	20,0	18,0	20,0	20,0
📁 Migrate AARD from New York Dat	11.01.2025	21.10.2025		2 10,0					20,0	20,0	30,0	30,0
👤 Product Manager	11.01.2025	21.10.2025							5,0	5,0	5,0	5,0
▸ 📁 GDPR Certification - Monetary	11.01.2025	31.05.2025		3 20,0					25,0	25,0	25,0	15,0
▸ 📁 GDPR Compliance - Loan Appl	01.01.2025	27.12.2025		3 10,0					15,0	15,0	25,0	10,0
▸ 📁 Monetary Transfers	01.05.2024	31.05.2025		2 30,0	17,0	17,0	17,0	9,0	6,0	6,0	10,0	12,0
▸ 📁 Upgrade to DoD IL 4 compliance	15.06.2024	12.11.2025		2 30,0	30,0	30,0	30,0	20,0	17,0	17,0	17,0	17,0

### > RESOURCES

[SHOW UTILIZATION FILTER](#) [UTILIZATION SETTINGS](#)

Name	Department OBS	Manager	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25
👤 Barry, Debra Product Manager	ARD Business Unit	Arpel, Ian								
👤 Berks, Paul Project Manager	ARD Business Unit/BusOps	Fowler, Ray								
👤 Bernard, Luc Project Manager	IT/Business Operations	Fowler, Ray								
👤 Chasen, Nicole Product Manager	ARD Business Unit/BusOps	Fowler, Ray								
👤 Clark, Patrick Product Manager	ARD Business Unit	Arpel, Ian								
👤 Inle, Kurt Product Manager	IT/Business Operations									

# 10

---

## Extras

Even more benefits!

# Trend Arrows for Future Planning

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> ALLOCATIONS

View: My Top Projects SAVE VIEW << < Months 15 SHOW > >> REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Investment Stat...	Team - Requ...	Oct '23	Nov '23	Dec '23	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
Lewis, Dana Engineer		New	22	22	21	23	21	21	22	23	20	23	22	21	23	21	22
License Costs Equipment		New	22	22	21	23	21	21	22	23	20	23	22	21	23	21	22
Lopez, Maria Project Manager		New	23	22	22	23	21						21	21	23	21	22
Miller, Veronica Security Architect		New	22	24	22	21	30						15	15	15	15	15
ML Engineer		New						21	22	23	20	23	23	21	23	21	22
Morris, Tom Architect		New	22	22	21	3	3	3	3	2	3	3	3	3			
Project Manager		New						21	22	23	20	23	23	21	23	21	22
Quinn, Randy Business Analyst		New	↗ 23	↘ 11	↗ 22	↘ 11	↗ 23	↘ 11	↗ 22	↘ 23							
Security Architect		New						5	5	5							
Server Equipment Equipment		New	↘ 0	↘ 22	↘ 0	↘ 22	↘ 0	21	23	21	21	22	23	20	23	22	21

> RESOURCES SHOW UTILIZATION FILTER UTILIZATION SETTINGS

Name	Department	Departmen...	Oct '23	Nov '23	Dec '23	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
Amos, Cheryl Engineer	Software Eng	ARD Busin...															
Andersson, Peter Engineer	Software Eng	ARD Busin...															
Arpel, Ian Business Analyst		ARD Busin...															
Berks, Paul Project Manager	BusOps	ARD Busin...															
Bernard, Luc Project Manager	Business Opera...	IT/Busines...															
Berry, Jason Engineer	BusOps	ARD Busin...															
Bhatt, Rakesh Engineer	BusOps	ARD Busin...															

Work Effort Unit: Days | Actuals / Planned Allocation Displaying 1 - 7 of 70

# Extensive Filtering Options

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> ALLOCATIONS

View: My Top Projects SAVE VIEW Months 15 SHOW REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Investment Status	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
AI-Powered Transformation	Approved	131	140	118	123	129	113							
BI Reporting Tool	Approved	45	49	50	47									
CRM Upgrade	Approved					43	50	44	20					
Digital Workforce Evolution	Approved						35	47	48	63	67	74	67	70
Omnichannel Integration	Approved	19	74	67	70	74	64	67	70	70	67	74	3	

UTILIZATION SHOW DATA FILTER UTILIZATION SETTINGS

INVESTMENT STATUS: Approved

STAFF OBS UNIT:

REQUEST STATUS:

FILTER CLEAR

Name	Location	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
Arpel, Ian Business Analyst														
Berks, Paul Project Manager	Chicago													
Bernard, Luc Project Manager	Paris													
Childers, Valerie Architect	New York													
Coleman, Joyce Architect	New York													
Dixon, Danielle Architect														

Work Effort Unit: Days | Actuals / Planned Allocation

Displaying 1 - 6 of 31

# Configurable Columns at the Resource Section

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> ALLOCATIONS

View My Top Projects SAVE VIEW Months 15 SHOW REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Investment Status	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25
AI-Powered Transformation	Approved	131	140	118	123	129	113				
BI Reporting Tool	Approved	45	49	50	47						
CRM Upgrade	Approved					43	50	44	20		
Digital Workforce Evolution	Approved						35	47	48	63	
Omnichannel Integration	Approved	19	74	67	70	74	64	67	70	70	

> RESOURCES

SHOW UTILIZATION FILTER UTILIZATION SETTINGS

Name	Location	Manager	Department	Resource - R...	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25
Arpel, Ian Business Analyst		Feinle, Kurt		Labor										
Berks, Paul Project Manager	Chicago	Fowler, Ray	BusOps	Labor										
Bernard, Luc Project Manager	Paris	Fowler, Ray	Business Operati...	Labor										
Childers, Valerie Architect	New York	Fowler, Ray	BusOps	Labor										
Coleman, Joyce Architect	New York	Fowler, Ray	BusOps	Labor										
Dixon, Danielle Architect				Labor										
Granger, Paula Project Manager	New York	Fowler, Ray	BusOps	Labor										

Work Effort Unit: Days | Actuals / Planned Allocation

Displaying 1 - 8 of 31



# Adjustable Availability Pop-up

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**itd Advanced Resource Planning** 00000002 ↗

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> ALLOCATIONS

View: My Top Projects SAVE VIEW ← Months 15 SHOW REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Investment Status	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
AI-Powered Transformation	Approved	131	140	118	123	129	113							
BI Reporting Tool	Approved	45	49	50	47									
CRM Upgrade	Approved					43	50	44	20					
Digital Workforce Evolution	Approved						35	47	48	63	67	74	67	70
Omnichannel Integration	Approved	19	74	67	70	74	64	67	70	70	67	74	3	

> RESOURCES SHOW UTILIZATION FILTER UTILIZATION SETTINGS

Name	Location	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
Arpel, Ian Business Analyst														
Berks, Paul Project Manager	Chicago													
Bernard, Luc Project Manager	Paris													
Childers, Valerie Architect	New York													
Coleman, Joyce Architect	New York													
Dixon, Danielle Architect														
Granger, Paula Project Manager	New York													

Work Effort Unit: Days | Actuals / Planned Allocation Displaying 1 - 8 of 31

Name ↑	Start	Finish	Staff OBS Unit	Mar 25
DPM Loan App Rel 6.0	29.08.2024	08.06.2025		7
EMEA GDPR Certific...	09.03.2025	29.08.2025	BU Staff	16
International Trade S...	18.03.2025	03.08.2025		1

# Redesign of the Preference Menu

The screenshot displays the 'itd Advanced Resource Planning' application interface. A 'PREFERENCES' dialog box is open, showing the 'UTILIZATION - COLUMNS' tab. The dialog has two main sections: 'UTILIZATION COLUMNS:' and 'AVAILABILITY POPUP COLUMNS:'. The 'UTILIZATION COLUMNS:' section contains a list of items: 'Department', 'Department OBS', 'Is External', 'Manager', and 'Resource - Resource Type'. The 'AVAILABILITY POPUP COLUMNS:' section contains 'Default Allocation' and 'Start'. The background interface shows a project allocation grid with columns for months from Sept. '24 to Sept. '25 and rows for various projects and resources. The 'PREFERENCES' dialog box has 'OK' and 'CANCEL' buttons at the bottom right.

Name	Investment Status	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25
AI-Powered Transformation	Approved	131	140	118	123	129	113							
BI Reporting Tool	Approved	45	49	50	47									
CRM Upgrade	Approved													
Digital Workforce Evolution	Approved													
Omnichannel Integration	Approved													

Name	Location	Sept. '25	Juni '25	Juli '25	Aug. '25	Sept. '25
Arpel, Ian Business Analyst						
Berks, Paul Project Manager	Chicago					
Bernard, Luc Project Manager	Paris					
Childers, Valerie Architect	New York					
Coleman, Joyce Architect	New York					
Dixon, Danielle Architect						
Granger, Paula Project Manager	New York					
Grant, Lily Project Manager	Chicago					

# New Toolbar Design

**ARP**

View: My Custom View 1 | Scenario: None | << | < | 📅 | > | >> | ⚙️ Preferences | 📄 Export



**Allocations** | Filter | Sort | Columns

Name	Start	Finish	Actuals	Apr '23	May '23	Jun '23	Jul '23
▶️ Absences	01/01/2013	12/31/2050	8,433.33	98.83	65.88	115.75	53.50
▶️ Absences	01/01/2013	12/31/2050					
▶️ AE@DZ	01/01/2016	12/31/2016					

**Resources** | Filter

Name	Apr '23	May '23	Jun '23	Jul '23	Aug '23
------	---------	---------	---------	---------	---------

# Fast as a Rocket

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> ALLOCATIONS

View: My Top Projects  Months 15 SHOW REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Investment - Rank	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25	Okt. '25	Nov. '25
▶ Omnichannel Integration	1	19	74	67	70	74	64	67	70	70	67	74	3			
▶ CRM Upgrade	2		20	49	50	38										
Architect			6	6	7	6										
Berks, Paul Project Manager			4	11	12	9										
Bernard, Luc Project Manager			3	9	9	7										
Childers, Valerie Architect			4	11	10	7										
Quinn, Randy Business Analyst			4	11	12	9										
▶ BI Reporting Tool	3	31	41	41	41											
▶ Digital Workforce Evolution	4						35	47	48	63	67	74	67	70	74	32
▶ AI-Powered Transformation	5	138	149	128	131	135	116									

> RESOURCES

Name	Location	Sept. '24	Okt. '24	Nov. '24	Dez. '24	Jan. '25	Feb. '25	März '25	Apr. '25	Mai '25	Juni '25	Juli '25	Aug. '25	Sept. '25	Okt. '25	Nov. '25
Arpel, Ian Business Analyst																
Berks, Paul Project Manager	Chicago															
Bernard, Luc Project Manager	Paris															
Childers, Valerie Architect	New York															
Coleman, Joyce Architect	New York															
Dixon, Danielle Architect																
Granger, Paula Project Manager	New York															

Work Effort Unit: Days | Actuals / Planned Allocation Displaying 1 - 7 of 31

# Room for Questions

Your Contact Persons



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# Thank you for your attention!

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# Introduction to itd Advanced Resource Planning



# Choose from 4 Different Views

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itd Advanced Resource Planning 00000002

itd Advanced Resource Managem... Organizational Demand Top Down Planning Workloads Manage Resources

> ALLOCATIONS

View Allocations by Investment

System Views

- Allocations by Investment
- Allocations by Resource
- Assignments by Investment
- Assignments by Resource

Allocations by Investment

- All Resources
- All Roles
- Unstaffed Projects

Allocations by Resource

SAVE AS MANAGE

Balanced and Diversified M 01/01/2024 12/31/2026

> RESOURCES

UTILIZATION SETTINGS

Name Jul '24 Aug '24 Sep '24 Oct '24 Nov '24 Dec '24 Jan '25 Feb '25 Mar '25 Apr '25 May '25 Jun '25

Name	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24	Jan '25	Feb '25	Mar '25	Apr '25	May '25	Jun '25
Fowler, Ray Manager			48.5	92.0	84.0	88.0	92.0	80.0	84.0	32.0		
Garcia, Alex ML Engineer	184.0	176.0	168.0	184.0	168.0	40.0						
Garcia, Noa Engineer	184.0	256.0	168.0	184.0	168.0	216.0						
Gaurand, Alicia QA	830.0	825.2	938.0	1,002.0	938.0	973.4						
Gitlian, Erin Engineer												
Goldman, Mark QA												

Work Effort Units: Days | Actuals / Planned Allocation

Displaying 35 - 41 of 168

Choose between the allocation and assignment view

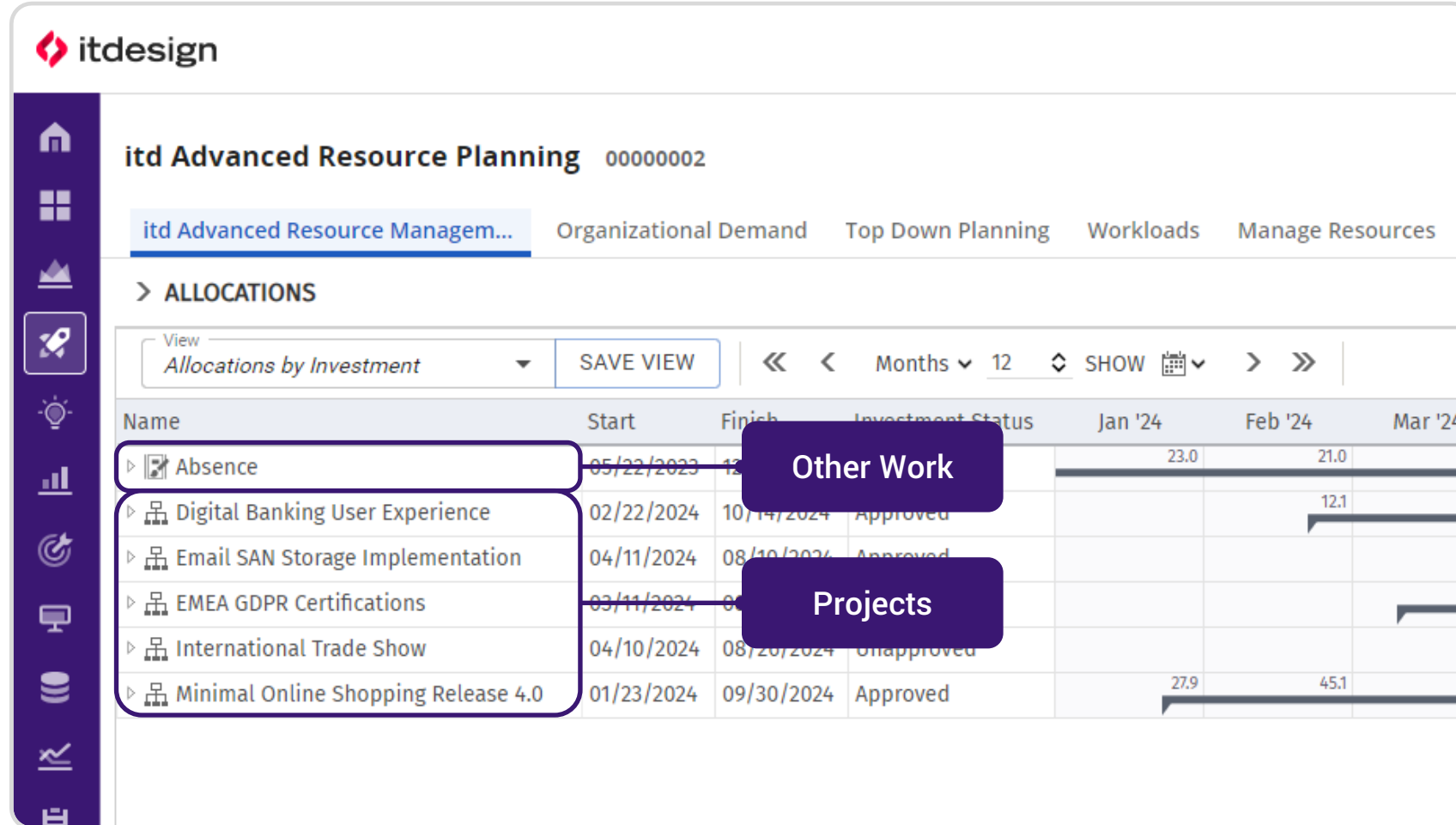
- > **Allocation View:** to plan roles and resources on a project level.
- > **Assignment View:** to plan roles and resources on a task level.

# Distinction Between Roles and Resources

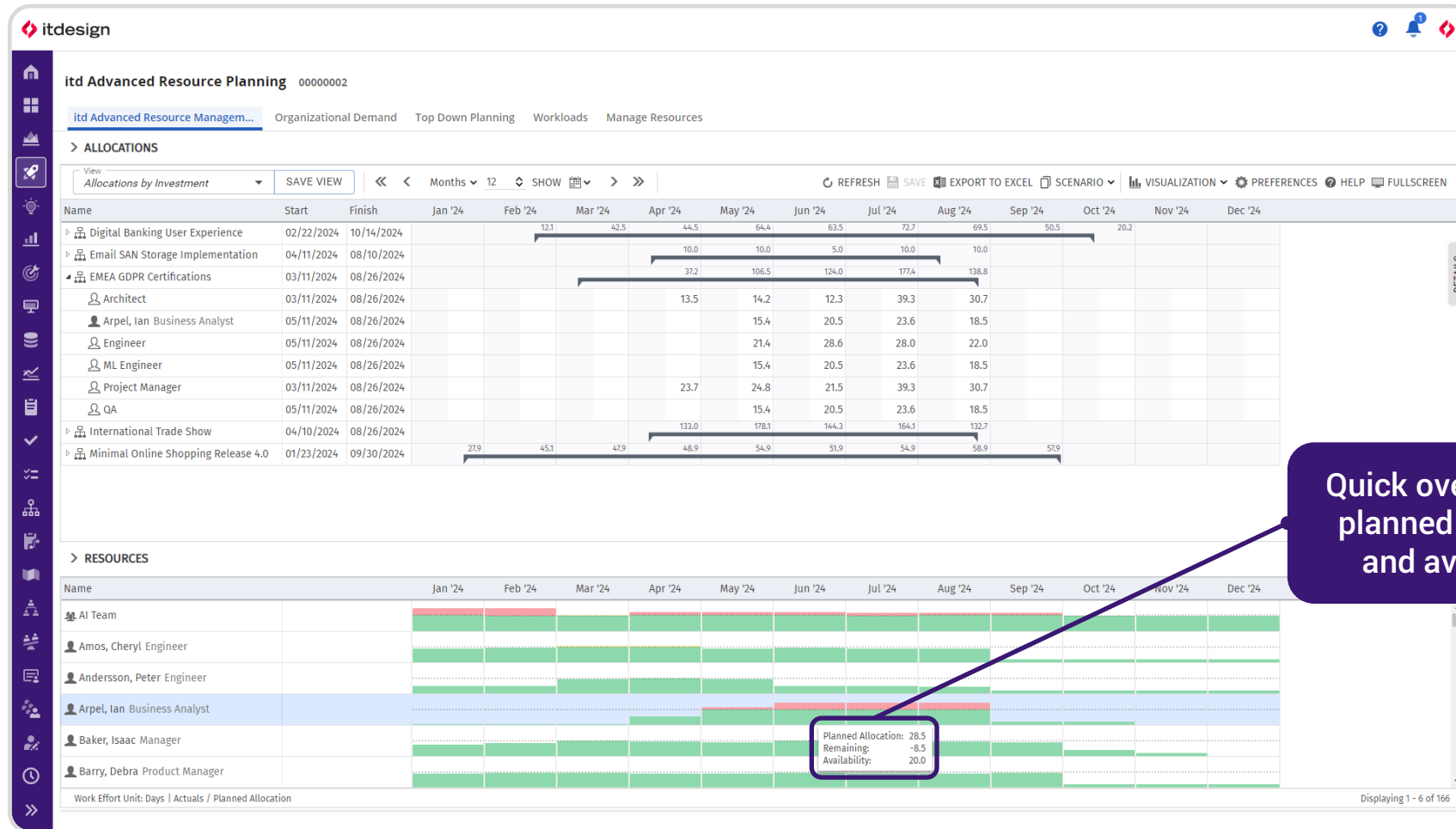
The screenshot displays the 'itd Advanced Resource Planning' interface. The main view is 'Allocations by Investment View'. A table lists various projects and their resource allocations for January, February, and March 2024. The table is annotated with callouts: 'Roles' points to the 'Product Manager' and 'Project Manager' rows, and 'Resources' points to the 'Thompson, Peter Engineer' row.

Name	Investment Status	Team - Request status	Jan '24	Feb '24	Mar '24
Digital Banking User Experience	Approved			12.1	4.1
Product Manager				6.1	2.1
Project Manager		New			
Thompson, Peter Engineer		Proposed		6.1	2.1
Email SAN Storage Implementation	Approved				
EMEA GDPR Certifications	Approved				
International Trade Show	Unapproved				
Minimal Online Shopping Release 4.0	Approved		27.9	45.1	4.1

# Distinction Between Different Investments



# Graphical Display of Bottlenecks



Quick overview over planned allocation and availability

# Detailed Overviews of Resources

The screenshot displays the 'itd Advanced Resource Planning' interface. The top navigation bar includes 'itd Advanced Resource Planning 00000002' and a sidebar with various icons. The main content area is divided into two sections: 'ALLOCATIONS' and 'RESOURCES'.

**ALLOCATIONS Section:**

- View: Allocations by Investment
- Buttons: SAVE VIEW, REFRESH, SAVE, EXPORT TO EXCEL, SCENARIO, VISUALIZATION, PREFERENCES, HELP, FULLSCREEN
- Navigation: Months 12, SHOW, and arrow controls.
- Table Headers: Name, Start, Finish, Investment Status, Jan '24, Feb '24, Mar '24, Apr '24, May '24, Jun '24, Jul '24, Aug '24, Sep '24, Oct '24, Nov '24, Dec '24.
- Table Data:
 

Name	Start	Finish	Investment Status	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
Digital Banking User Experience	02/22/2024	10/14/2024	Approved		12.1	42.5	44.5	64.4	63.5	72.7	69.5	50.5	20.2		
Email SAN Storage Implementation	04/11/2024	08/10/2024	Approved				10.0	10.0	5.0	10.0	10.0				
EMEA GDPR Certifications	03/11/2024	08/26/2024	Approved				37.2	106.5	124.0	177.4					
International Trade Show	04/10/2024	08/26/2024	Unapproved				137.0	185.5	150.7	171.7	138.5				
Minimal Online Shopping Release 4.0	01/23/2024	09/30/2024	Approved	27.9	45.1	47.9	48.9	54.9	51.9	59.9	73.9	72.9			

**RESOURCES Section:**

- UTILIZATION SETTINGS button.
- Table Headers: Name, Jan '24, Feb '24, Mar '24, Apr '24, May '24, Jun '24, Jul '24, Aug '24, Sep '24, Oct '24, Nov '24, Dec '24.
- Table Data:
 

Name	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
Awad, Rashid Engineer												
Baker, Isaac Manager												
Barry, Debra Product Manager												
Bauer, Joyce ML Engineer												
Beasley, Frank UX												
Berks, Paul Project Manager												

**Callout Box:** Quick overview over the detailed allocation by clicking on the histogram.

**Callout Table:**

Name	Start	Finish	Staff OBS Unit	May '24
DPM Loan App Rel 4.0	01/01/2024	07/26/2024		18.0
International Trade Show	04/10/2024	08/26/2024		7.3
Run the Business	05/22/2023	12/31/2024		1.0

Work Effort Unit: Days | Actuals / Planned Allocation

Displaying 5 - 11 of 168



## General Settings in Preference Menu

# General Settings in Preference Menu

The screenshot displays the 'itdesign' software interface for 'itd Advanced Resource Planning'. The main window shows a resource allocation grid with columns for months from Jan '24 to Nov '24. A 'PREFERENCES' dialog box is open, showing the 'GENERAL' tab. The dialog box contains the following settings:

- TOOLBAR ONLY WITH ICONS:
- SHOW UTILIZATION:
- CALCULATE SUMS: On
- SHOW TEAM ENTRIES OF INACTIVE RESOURCES:
- LOAD DATA ON STARTUP:
- SHOW INVESTMENT HIERARCHY: Off

A callout box points to the 'PREFERENCES' button in the top toolbar. A text box states: 'General settings can be set in the preference menu'.



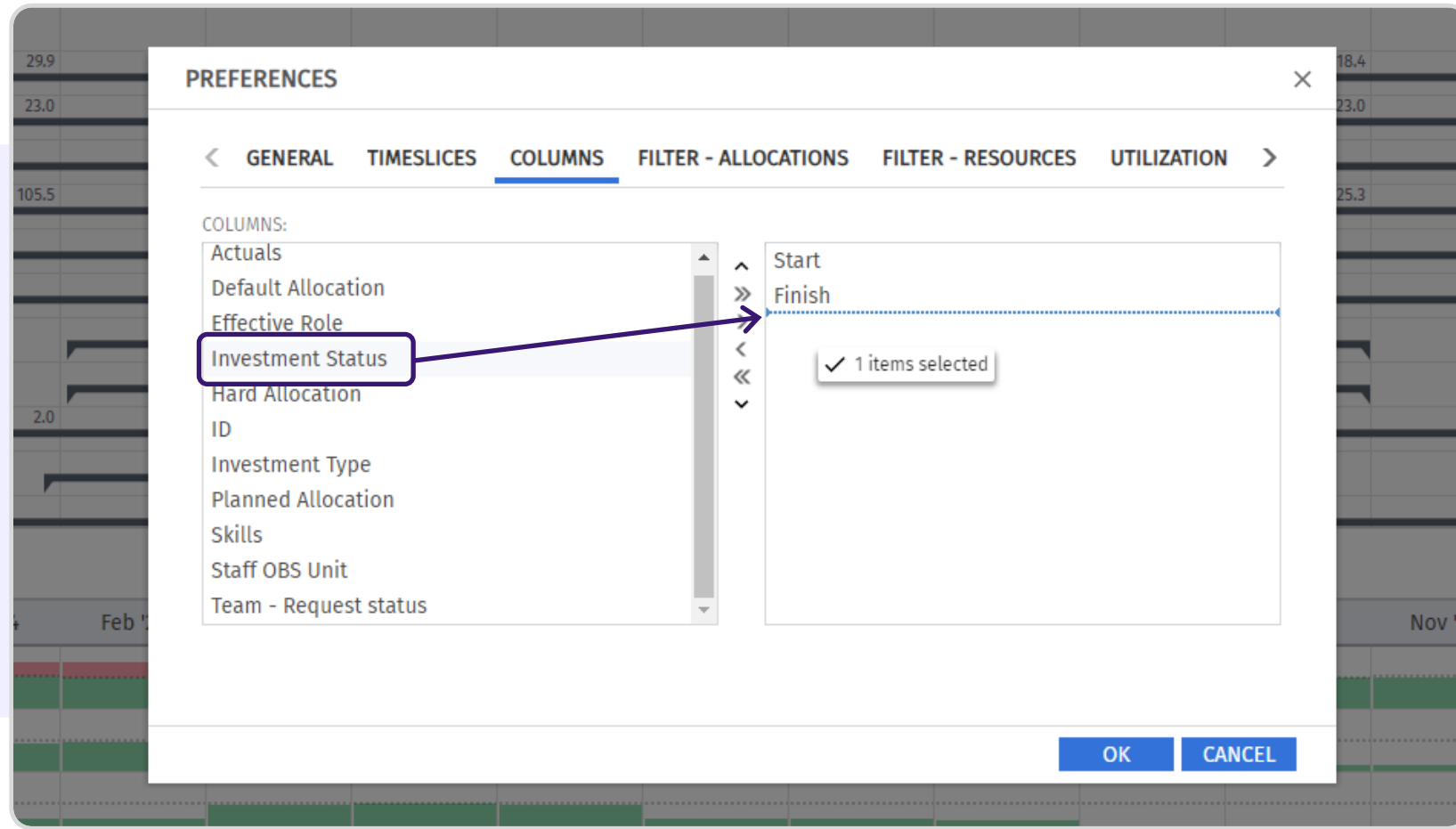
# Add Additional Information to Your Screen

Filter and display your custom columns.

The screenshot shows the 'itd Advanced Resource Planning' interface. A callout box points to the 'Investment Status' and 'Team - Request status' columns in the table, with the text: 'Add any column with further information to your view'.

Name	Investment Status	Team - Request status	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24
Digital Banking User Experience	Approved			18.2	63.8	66.8	87.7	83.8
Product Manager		New		6.1	21.3	22.3	23.3	20.2
Project Manager		New					17.9	23.1
Thompson, Peter Engineer		Proposed		6.1	21.3	22.3	23.3	20.2
UX		New		6.1	21.3	22.3	23.3	20.2
Email SAN Storage Implementation	Approved					10.0	10.0	5.0
Engineer		New				10.0	10.0	5.0
Pendulkar, Sachin Project Manager		Booked						
EMEA GDPR Certifications	Approved					37.2	106.5	124.0
International Trade Show	Unapproved					137.0	185.5	150.7
Minimal Online Shopping Release 4.0	Approved		27.9	45.1	47.9	48.9	54.9	51.9

# How to Add Further Columns to Your View



- > Add additional columns in the preferences settings by moving them to the right.

# Allocation Filter

The screenshot displays the 'itd Advanced Resource Planning' interface. The top navigation bar includes 'itd Advanced Resource Planning' and '00000002'. Below this, there are tabs for 'Organizational Demand', 'Top Down Planning', 'Workloads', and 'Manage Resources'. The 'ALLOCATIONS' section is active, showing a 'Collapse/Expand Filter' button. The main area contains a table with columns for months from Jan '24 to Dec '24. The table lists several investment items with their start and finish dates and resource allocation values. Below the table, the 'RESOURCES' section shows a resource utilization chart for various team members, including AI Team, Amos, Cheryl, Andersson, Peter, Arpel, Ian, Baker, Isaac, Barry, Debra, and Readeau, Frank. The chart uses green bars to represent resource allocation over time.

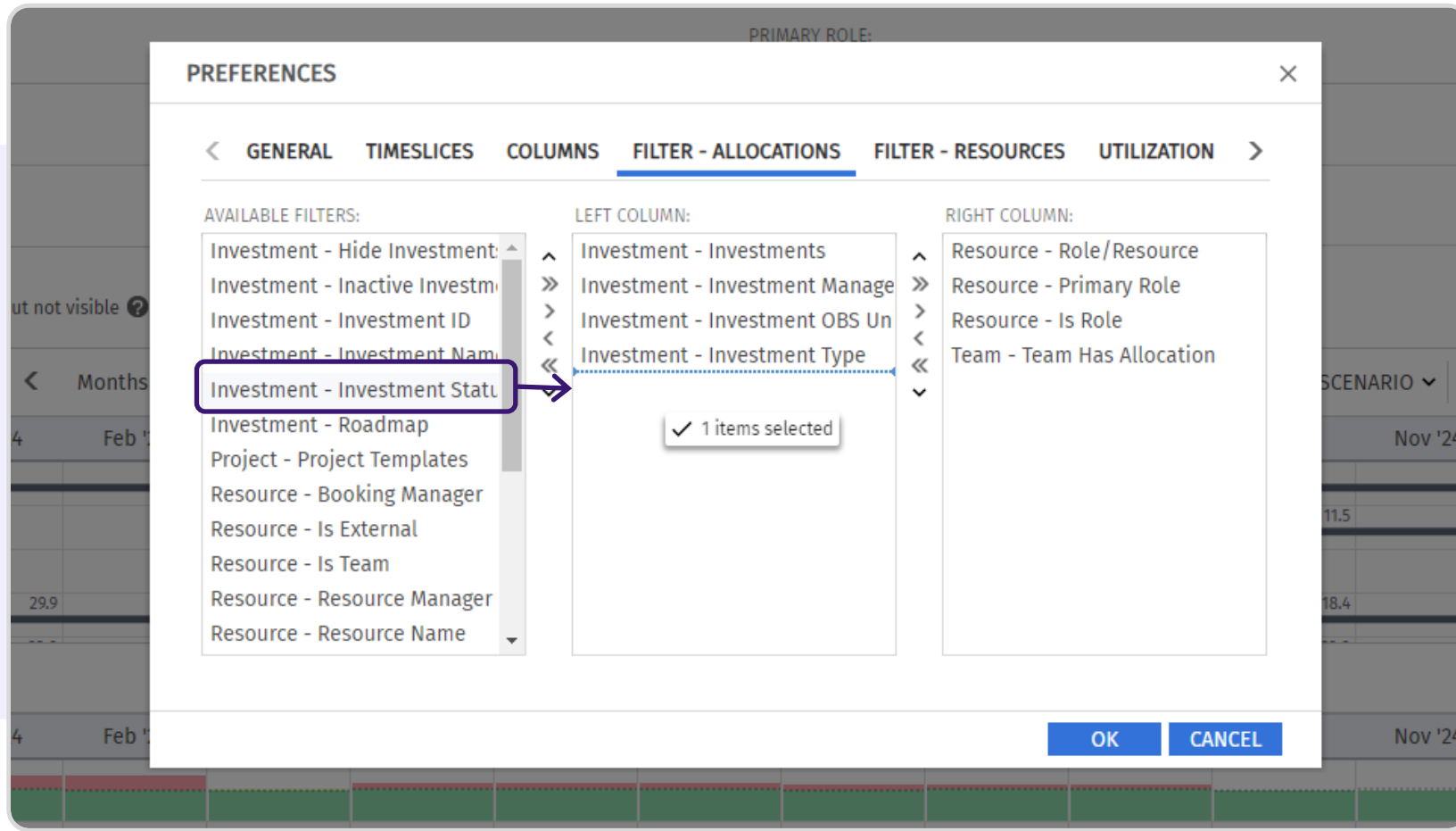
**Investment Items Table:**

Name	Start	Finish	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
A typical Strategy: Business	01/01/2023	12/31/2026												
ABLE Payments Digital Expe	09/12/2024	04/11/2025									6.1	11.5	10.5	11.0
ABLE Payments Digital Expe	09/13/2025	04/10/2026												
ABLE Payments Module	12/16/2023	03/03/2025	29.9	27.3	123.8	164.1	159.2	139.7	20.9	17.6	16.8	18.4	16.8	17.6

**Resources Table:**

Name	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
AI Team	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Amos, Cheryl Engineer	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Andersson, Peter Engineer	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Arpel, Ian Business Analyst	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Baker, Isaac Manager	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Barry, Debra Product Manage	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Readeau, Frank JIX	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green

# How to Change Allocation Filter



- > Customizable views by using the configurable filters – any standard or custom attribute can be used for filtering.

# Customizable Utilization Rate

Chose when a person's availability is highlighted in green, yellow or red

**PREFERENCES**

GENERAL TIMESLICES COLUMNS FILTER **UTILIZATION** LAYOUT

**UTILIZATION RATE**

LOW UTILIZATION AT AND BELOW: 80.0%

UTILIZATION WARNING ABOVE: 100.0%

HIGH UTILIZATION ABOVE: 110.0%

**UTILIZATION FILTER**

STAFF OBS UNIT:

INVESTMENT STATUS:

OK CANCEL

**> ALLOCATIONS**

View: Allocations by Resource SAVE VIEW

Months 12 SHOW

REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION

Name	Start	Finish	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24
Amos, Cheryl Engineer	06/10/2023	12/31/2024	19.6 / 3.4	19.2 / 1.8	23.0 / -1.9	23.2 / -1.1	19.6 / 3.4	19.0 / 1.0	19.6 / 3.4	19.4 / 2.6	4.2 / 16.8
Andersson, Peter Engineer	02/29/2024	05/04/2024	11.5 / 11.5	10.5 / 10.5	20.5 / 0.5	21.0 / 1.0	21.5 / 1.5	10.0 / 10.0	11.5 / 11.5	9.5 / 12.5	4.2 / 16.8
Awad, Rashid Engineer	01/01/2024	09/30/2024	29.8 / -6.7	22.3 / -1.2	19.0 / 2.0	23.0 / -1.0	26.3 / -3.3	22.4 / -2.4	26.1 / -3.1	21.7 / 0.3	16.0 / 5.0
Barry, Debra Product Manager	01/23/2024	09/20/2024	19.6 / 3.4	19.2 / 1.8	19.2 / 1.8	19.4 / 2.6	19.6 / 3.4	19.0 / 1.0	19.6 / 3.4	19.4 / 2.6	19.2 / 1.8
Berry, Jason Engineer	03/10/2024	06/27/2024	4.6 / 18.4	4.2 / 16.8	19.2 / 1.8	19.4 / 2.6	19.6 / 3.4	19.0 / 1.0	4.6 / 18.4	4.4 / 17.6	4.2 / 16.8
Bhatt, Rakesh Engineer	03/01/2024	08/26/2024	0.0 / 23.0	0.0 / 21.0	10.0 / 11.0	15.6 / 6.4	16.7 / 6.3	15.8 / 4.2	3.2 / 19.8	6.0 / 16.0	4.2 / 16.8
Chasen, Nicole Product Manager	04/01/2024	05/31/2024	4.6 / 18.4	4.2 / 16.8	4.2 / 16.8	9.4 / 12.6	14.6 / 8.4	4.0 / 16.0	4.6 / 18.4	4.4 / 17.6	4.2 / 16.8
Chen, Chih-wei Engineer			21.0 / 2.0	21.0 / 0.0	21.0 / 0.0	21.0 / 1.0	21.0 / 2.0	21.0 / -1.0	21.0 / 2.0	21.0 / 1.0	1.0 / 20.0
Childers, Valerie Architect	01/01/2024	09/05/2024	3.0 / 20.0	19.0 / 2.0	19.0 / 2.0	19.0 / 3.0	19.0 / 4.0	19.0 / 1.0	11.0 / 12.0	32.0 / -10.0	11.0 / 10.0
Clark, Patrick Product Manager			4.6 / 18.4	4.2 / 16.8	4.2 / 16.8	4.4 / 17.6	4.6 / 18.4	4.0 / 16.0	4.6 / 18.4	4.4 / 17.6	4.2 / 16.8
Clarke, Stanley Engineer			23.5 / -0.5	22.5 / -1.5	22.5 / -1.5	22.0 / 0.0	22.0 / 1.0	12.0 / 8.0	12.0 / 11.0	12.0 / 10.0	2.0 / 19.0
Coleman, Joyce Architect	01/23/2024	09/20/2024	6.9 / 16.1	10.1 / 10.9	12.9 / 8.1	12.9 / 9.1	12.9 / 10.1	12.9 / 7.1	12.9 / 10.1	12.9 / 9.1	12.9 / 8.1
Derrickson, John Engineer			11.0 / 12.0	11.0 / 10.0	11.0 / 10.0	11.0 / 11.0	11.0 / 12.0	11.0 / 9.0	11.0 / 12.0	11.0 / 11.0	11.0 / 10.0

# Customizable Data

Choose the data you want to display

**PREFERENCES**

< .L TIMESLICES COLUMNS FILTER - ALLOCATIONS FILTER - RESOURCES UTILIZATION **LAYOUT** >

**CELL CONFIGURATION**

May '24	Jun '24	Jul '24	Aug '24	Sep '24			
38.5	45.8	58.5	45.2	10.3	30.5	52.0	31.3

FIELD TO DISPLAY ON THE LEFT PART OF THE CELL (READ ONLY): Actuals

FIELD TO DISPLAY ON THE RIGHT PART OF THE CELL (EDITABLE): Planned Allocation

**SORTING**

SORT INVESTMENTS BY: Investment - Name (Default)

SORT TEAM ENTRIES BY: Team - Name (Default)

OK CANCEL

Customizable sorting and displayed data



# Allocation by Investment View

# Drag and Drop Role

The screenshot displays the 'itd Advanced Resource Planning' interface. The top navigation bar includes 'itd Advanced Resource Planning 00000002' and 'itd Advanced Resource Managem...'. Below this, the 'ALLOCATIONS' section is active, showing a table of projects and their resource requirements over time. The 'Minimal Online Shopping Release 4.0' project is selected, and its resource allocation is visible. A purple box highlights the 'Barry, Debra Product Manager' role, and an arrow points to the 'RESOURCES' section where this role is listed. The 'RESOURCES' section shows a list of roles and their availability over time, with a purple box highlighting the 'Barry, Debra Product Manager' role.

Name	Start	Finish	Investment Status	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
Digital Banking User Experience	02/22/2024	10/14/2024	Approved		18.2	63.8	66.8	87.7	83.8	96.0	91.8	71.7	30.4		
Email SAN Storage Implementation	04/11/2024	08/10/2024	Approved				22.5	12.0	7.0	12.0	12.0				
EMEA GDPR Certifications	03/11/2024	08/26/2024	Approved				37.2	106.5	124.0	177.4	138.8				
International Trade Show	04/10/2024	08/26/2024	Approved				137.0	185.5	150.7	171.7	138.5				
Minimal Online Shopping Release 4.0	01/23/2024	01/30/2024	Approved	27.9	45.1	47.9	48.9	54.9	51.9	59.9	73.9	72.9			
Awad, Rashid Engineer	01/23/2024	01/30/2024								5.0	15.0	15.0			
Barry, Debra Product Manager	01/23/2024	01/20/2024		15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0			
Coleman, Joyce Architect	01/23/2024	09/20/2024		5.9	9.1	11.9	11.9	11.9	11.9	11.9	11.9	11.9			
Computer Material	01/23/2024	09/30/2024													
Lefevre, Christophe Product M	01/23/2024	09/30/2024		7.0	21.0	21.0	22.0	23.0	20.0	23.0	22.0	21.0			
McCarthy, John Product Owner	05/01/2024	09/30/2024						5.0	5.0	5.0	5.0	5.0			
Parker, Ashley Product Manage	08/01/2024	09/30/2024									5.0	5.0			

Name	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
ABM Marketing												
Engineer												
Product Owner												
QA												
UX												

> Roles can easily be allocated on a project or investment **per drag and drop.**



# Filter for Suitable Candidate

The screenshot displays the 'itd Advanced Resource Planning' interface. The main view is a resource allocation grid under the 'ALLOCATIONS' section. The grid shows various projects and their resource requirements over time (Jan '24 to Dec '24). A context menu is open over the 'QA' role, with the option 'Show candidates (by Role, OBS and Skills)' highlighted. Below the grid, the 'RESOURCES' section shows a list of roles: Engineer, Product Owner, QA, and UX, with their utilization over time.

Name	Start	Finish	Investment Status	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
Digital Banking User Experience	02/22/2024	10/14/2024	Approved		18.2	63.8	66.8	87.7	83.8	96.0	91.8	71.7	30.4		
Email SAN Storage Implementation	04/11/2024	08/10/2024	Approved				22.5	12.0	7.0	12.0	12.0				
EMEA GDPR Certifications	03/11/2024	08/26/2024	Approved				37.2	106.5	124.0	177.4	138.8				
Architect	03/11/2024	08/26/2024					13.5	14.2	12.3	39.3	30.7				
Arpel, I	08/26/2024	08/26/2024						15.4	20.5	23.6	18.5				
Engineer	08/26/2024	08/26/2024						21.4	28.6	28.0	22.0				
ML Eng	08/26/2024	08/26/2024						15.4	20.5	23.6	18.5				
Project	08/26/2024	08/26/2024					23.7	24.8	21.5	39.3	30.7				
QA	08/26/2024	08/26/2024						15.4	20.5	23.6	18.5				
Internatio	08/26/2024	08/26/2024	Approved					137.0	185.5	150.7	171.7	138.5			
Minimal O	09/30/2024	09/30/2024	Approved		27.9	45.1	47.9	48.9	54.9	51.9	59.9	73.9			

> **Quick filtering** for suitable resources with matching roles, OBS (organizational breakdown structure) and skills.

# Drag and Drop Resource

The screenshot displays the 'itd Advanced Resource Planning' interface. The top section shows 'ALLOCATIONS' with a table of projects and their resource requirements over time. A red box highlights a 'QA \*\*\*' resource in the 'International Trade' project row. Below this, the 'RESOURCES' section shows a list of resources with their availability over time. A red box highlights 'Goldman, Mark QA' in the resource list. A blue arrow points from the 'Goldman, Mark QA' resource to the 'QA \*\*\*' resource in the allocation table, illustrating the drag-and-drop action.

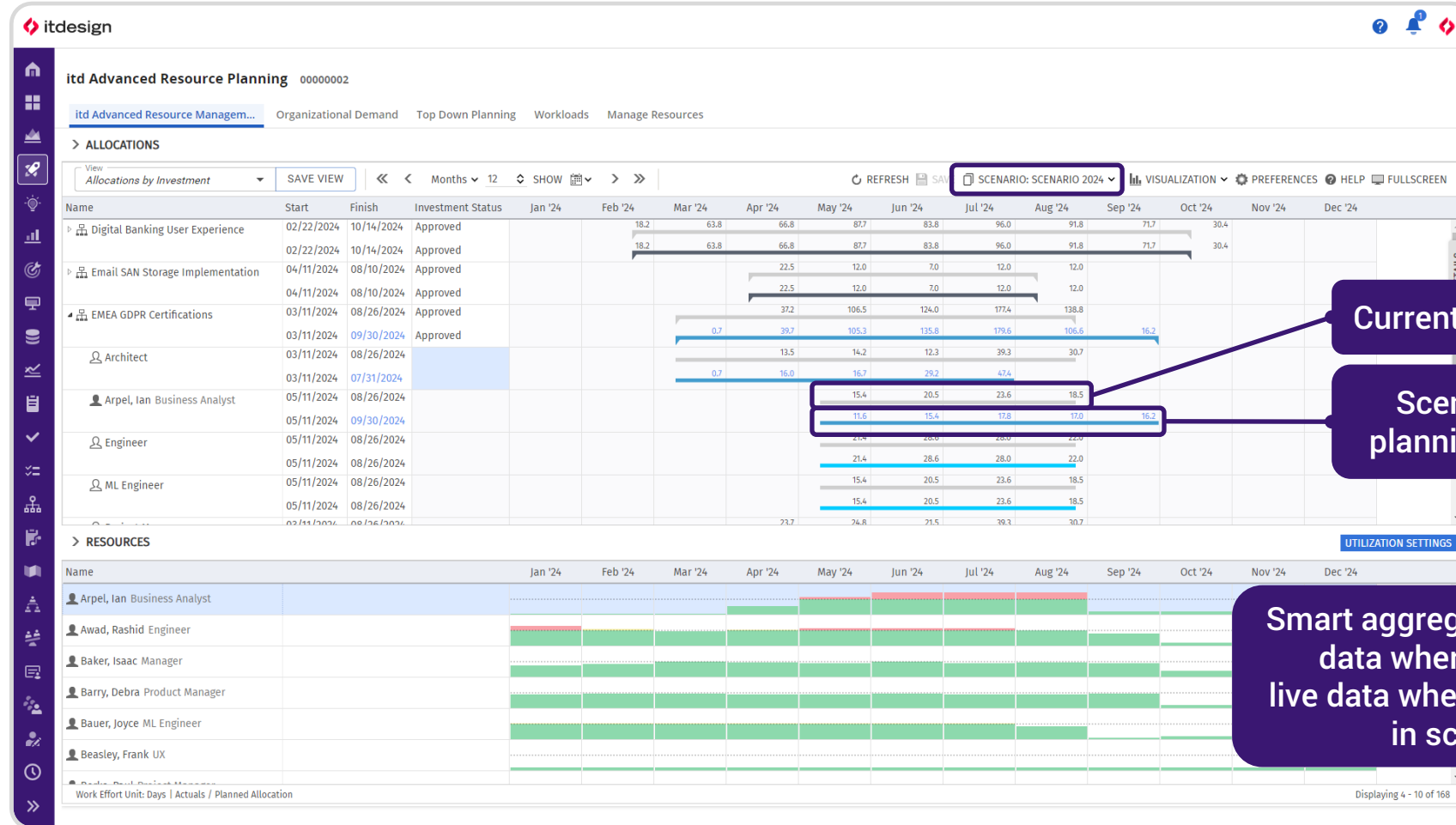
Name	Start	Finish	Investment Status	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
Digital Banking User Experience	02/22/2024	10/14/2024	Approved		18.2	63.8	66.8	87.7	83.8	96.0	91.8	71.7	30.4		
Email SAN Storage Implementation	04/11/2024	08/10/2024	Approved				22.5	12.0	7.0	12.0	12.0				
EMEA GDPR Certifications	03/11/2024	08/26/2024	Approved				37.2	106.5	124.0	177.4	138.8				
Architect	03/11/2024	08/26/2024					13.5	14.2	12.3	39.3	30.7				
Arpel, Ian Business Analyst	05/11/2024	08/26/2024						15.4	20.5	23.6	18.5				
Engineer	05/11/2024	08/26/2024						21.4	28.6	28.0	22.0				
ML Engineer	05/11/2024	08/26/2024						15.4	20.5	23.6	18.5				
Project Manager	03/11/2024	08/26/2024					23.7	24.8	21.5	39.3	30.7				
QA ***	05/11/2024	08/26/2024						15.4	20.5	23.6	18.5				
International Trade			Approved				137.0	185.5	150.7	171.7	138.5				
Minimal Online Shopping			Approved	27.9	45.1	47.9	48.9	54.9	51.9	59.9	73.9	72.9			

Name	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
Carmen, Ed QA												
Geurand, Alizia QA												
Goldman, Mark QA												
Jones, Mike QA												
Krishna, Arun QA												
Krishna, Sai QA												

> Resources can easily be staffed on a project or investment **per drag and drop** and replace the allocated role.

# Scenario Mode for Allocation Planning

Perform “What if”-analyses within a scenario that is saved separate from your live data.



---

## Allocation by Resource View

# Detailed Overviews of Resources

Allocations by Resource View

itdesign

itd Advanced Resource Planning 00000002

itd Advanced Resource Managem... Organizational Demand Top Down Planning Workloads Manage Resources

> ALLOCATIONS

View Allocations by Resource SAVE VIEW Months 12 SHOW

REFRESH SAVE EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec '24
Amos, Cheryl Engineer	19.6 / 3.4	19.2 / 1.8	23.0 / -1.9	23.2 / -1.1	19.6 / 3.4	19.0 / 1.0	19.6 / 3.4	19.4 / 2.6	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	4.4 / 17.6
Andersson, Peter Engineer	11.5 / 11.5	10.5 / 10.5	20.5 / 0.5	21.0 / 1.0	21.5 / 1.5	10.0 / 10.0	11.5 / 11.5	9.5 / 12.5	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	4.4 / 17.6
Arpel, Ian Business Analyst	1.0 / 22.0	1.0 / 20.0	1.0 / 20.0	11.6 / 10.4	25.8 / -2.8	28.5 / -8.5	32.9 / -9.9	31.6 / -9.6	4.2 / 16.8	4.6 / 18.4	0.0 / 21.0	0.0 / 22.0
Awad, Rashid Engineer	29.8 / -6.7	22.3 / -1.2	19.0 / 2.0	23.0 / -1.0	26.3 / -3.3	22.4 / -2.4	26.1 / -3.1	21.7 / 0.3	16.0 / 5.0	4.6 / 18.4	0.0 / 21.0	0.0 / 22.0
Baker, Isaac Manager	17.0 / 6.0	17.0 / 4.0	20.9 / 0.1	20.0 / 2.0	20.0 / 3.0	20.0 / 0.0	20.0 / 3.0	20.0 / 2.0	18.0 / 3.0	8.8 / 14.2	3.8 / 17.2	0.0 / 22.0
B2B Value Stream	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0			
GlobalX Acquisition			1.9	1.0	1.0	1.0	1.0	1.0	1.0	4.2	3.8	
HR Integration - GlobalX			2.0	2.0	2.0	2.0	2.0	2.0	2.0			
Overall M&A Playbook												
Run the Business	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	2.0	4.6		
Barry, Debra Product Manager	19.6 / 3.4	19.2 / 1.8	19.2 / 1.8	19.4 / 2.6	19.6 / 3.4	19.0 / 1.0	19.6 / 3.4	19.4 / 2.6	19.2 / 1.8	4.6 / 18.4	4.2 / 16.8	4.4 / 17.6
Bauer, Joyce ML Engineer	24.0 / -1.0	22.0 / -1.0	22.0 / -1.0	23.0 / -1.0	24.0 / -1.0	21.0 / -1.0	24.0 / -1.0	18.0 / 4.0	2.0 / 19.0	4.6 / 18.4	0.0 / 21.0	0.0 / 22.0
Beasley, Frank UX	4.6 / 18.4	4.2 / 16.8	4.2 / 16.8	4.4 / 17.6	4.6 / 18.4	4.0 / 16.0	4.6 / 18.4	4.4 / 17.6	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	4.4 / 17.6
Berks, Paul Project Manager	4.6 / 18.4	4.2 / 16.8	16.2 / 4.8	23.5 / -1.5	15.4 / 7.6	13.4 / 6.6	15.4 / 7.6	13.3 / 8.7	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	4.4 / 17.6
Bernard, Luc Project Manager	4.6 / 18.4	4.2 / 16.8	19.2 / 1.8	23.2 / -1.1	15.8 / 7.2	15.1 / 4.9	17.3 / 5.7	15.0 / 7.0	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	4.4 / 17.6
Berry, Jason Engineer	4.6 / 18.4	4.2 / 16.8	19.2 / 1.8	19.4 / 2.6	19.6 / 3.4	19.0 / 1.0	4.6 / 18.4	4.4 / 17.6	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	4.4 / 17.6
Bhatt, Rakesh Engineer	0.0 / 23.0	0.0 / 21.0	10.0 / 11.0	15.6 / 6.4	16.7 / 6.3	15.8 / 4.2	3.2 / 19.8	6.0				
Carmen, Ed QA	19.6 / 3.4	19.2 / 1.8	19.2 / 1.8	19.4 / 2.6	19.6 / 3.4	19.0 / 1.0	19.6 / 3.4	19.4				
eCommerce Portal	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0				
Run the Business	4.6	4.2	4.2	4.4	4.6	4.0	4.6					
Chapin, Tom Solutions Marketing	1.0 / 22.0	1.0 / 20.0	1.0 / 20.0	1.0 / 21.0	1.0 / 22.0	1.0 / 19.0	1.0 / 22.0	1.0				
Chase, Liz Product Marketing	4.6 / 18.4	4.2 / 16.8	4.2 / 16.8	4.4 / 17.6	4.6 / 18.4	4.0 / 16.0	4.6 / 18.4	4.4				
Chasen, Nicole Product Manager	4.6 / 18.4	4.2 / 16.8	4.2 / 16.8	9.4 / 12.6	14.6 / 8.4	4.0 / 16.0	4.6 / 18.4	4.4				
Chen, Chih-wei Engineer	21.0 / 2.0	21.0 / 0.0	21.0 / 0.0	21.0 / 1.0	21.0 / 2.0	21.0 / -1.0	21.0 / 2.0	21.0 / 1.0	1.0 / 20.0	4.6 / 18.4	0.0 / 21.0	0.0 / 22.0
Childers, Valerie Architect	3.0 / 20.0	19.0 / 2.0	19.0 / 2.0	19.0 / 3.0	19.0 / 4.0	19.0 / 1.0	11.0 / 12.0	32.0 / -10.0	11.0 / 10.0	7.6 / 15.4	6.9 / 14.1	0.0 / 22.0
Clark, Patrick Product Manager	4.6 / 18.4	4.2 / 16.8	4.2 / 16.8	4.4 / 17.6	4.6 / 18.4	4.0 / 16.0	4.6 / 18.4	4.4 / 17.6	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	4.4 / 17.6

Work Effort Unit: Days | Actuals / Planned Allocation

Quick overview over the team's utilization and on what a resource works on

# Export All Views to Excel

Expanding / collapsing is included in the Excel file

itd Advanced Resource Planning 00000002

itd Advanced Resource Managem... Organizational Demand Top Down Planning Workloads Manage Resources

> ALLOCATIONS

View: Allocations by Resource SAVE VIEW << Months 12 SHOW >> REFRESH EXPORT TO EXCEL SCENARIO VISUALIZATION PREFERENCES HELP FULLSCREEN

Name	Start	Finish	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24	Aug '24	Sep '24	Oct '24	Nov '24	Dec
Amos, Cheryl Engineer	06/10/2023	12/31/2024	19.6 / 3.4	19.2 / 1.8	23.0 / -1.9	23.2 / -1.1	19.6 / 3.4	19.0 / 1.0	19.6 / 3.4	19.2 / 2.6	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	
Andersson, Peter Engineer	02/29/2024	05/04/2024	11.5 / 11.5	10.5 / 10.5	20.5 / 0.5	21.0 / 1.0	21.5 / 1.5	10.0 / 10.0	11.5 / 11.5	9.5 / 12.5	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	
Awad, Rashid Engineer	01/01/2024	09/30/2024	29.8 / -6.7	22.3 / -1.2	19.0 / 2.0	23.0 / -1.0	26.3 / -3.3	22.4 / -2.4	26.1 / -3.1	21.7 / 0.3	16.0 / 5.0	4.6 / 18.4	0.0 / 21.0	0
Barry, Debra Product Mana	01/23/2024	09/20/2024	19.6 / 3.4	19.2 / 1.8	19.2 / 1.8	19.4 / 2.6	19.6 / 3.4	19.0 / 1.0	19.6 / 3.4	19.4 / 2.6	19.2 / 1.8	4.6 / 18.4	4.2 / 16.8	
Berry, Jason Engineer	03/10/2024	06/27/2024	4.6 / 18.4	4.2 / 16.8	19.2 / 1.8	19.4 / 2.6	19.6 / 3.4	19.0 / 1.0	4.6 / 18.4	4.4 / 17.6	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	
Bhatt, Rakesh Engineer	03/01/2024	08/26/2024	0.0 / 23.0	0.0 / 21.0	10.0 / 11.0	15.6 / 6.4	16.7 / 6.3	15.8 / 4.2	3.2 / 19.8	6.0 / 16.0	4.2 / 16.8	4.6 / 18.4	0.0 / 21.0	0
Chasen, Nicole Product Ma	04/01/2024	05/31/2024	4.6 / 18.4	4.2 / 16.8	4.2 / 16.8	9.4 / 12.6	14.6 / 8.4	4.0 / 16.0	4.6 / 18.4	4.4 / 17.6	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	
Chen, Chih-wei Engineer			21.0 / 2.0	21.0 / 0.0	21.0 / 0.0	21.0 / 1.0	21.0 / 1.0	21.0 / 2.0	21.0 / 2.0	21.0 / 1.0	1.0 / 20.0	4.6 / 18.4	0.0 / 21.0	0
Childers, Valerie Architect	01/01/2024	09/05/2024	3.0 / 20.0	19.0 / 2.0	19.0 / 2.0	19.0 / 3.0	19.0 / 4.0	19.0 / 1.0	11.0 / 12.0	32.0 / -10.0	11.0 / 10.0	7.6 / 16.8	6.9 / 14.1	0
Clark, Patrick Product Mana			4.6 / 18.4	4.2 / 16.8	4.2 / 16.8	4.4 / 17.6	4.6 / 18.4	4.0 / 16.0	4.6 / 18.4	4.4 / 17.6	4.2 / 16.8	4.6 / 18.4	4.2 / 16.8	
Clarke, Stanley Engineer			23.5 / -0.5	22.5 / -1.5	22.5 / -1.5	22.0 / 0.0	22.0 / 1.0	12.0 / 8.0	12.0 / 11.0	12.0 / 10.0	2.0 / 19.0	4.6 / 18.4	0.0 / 21.0	0

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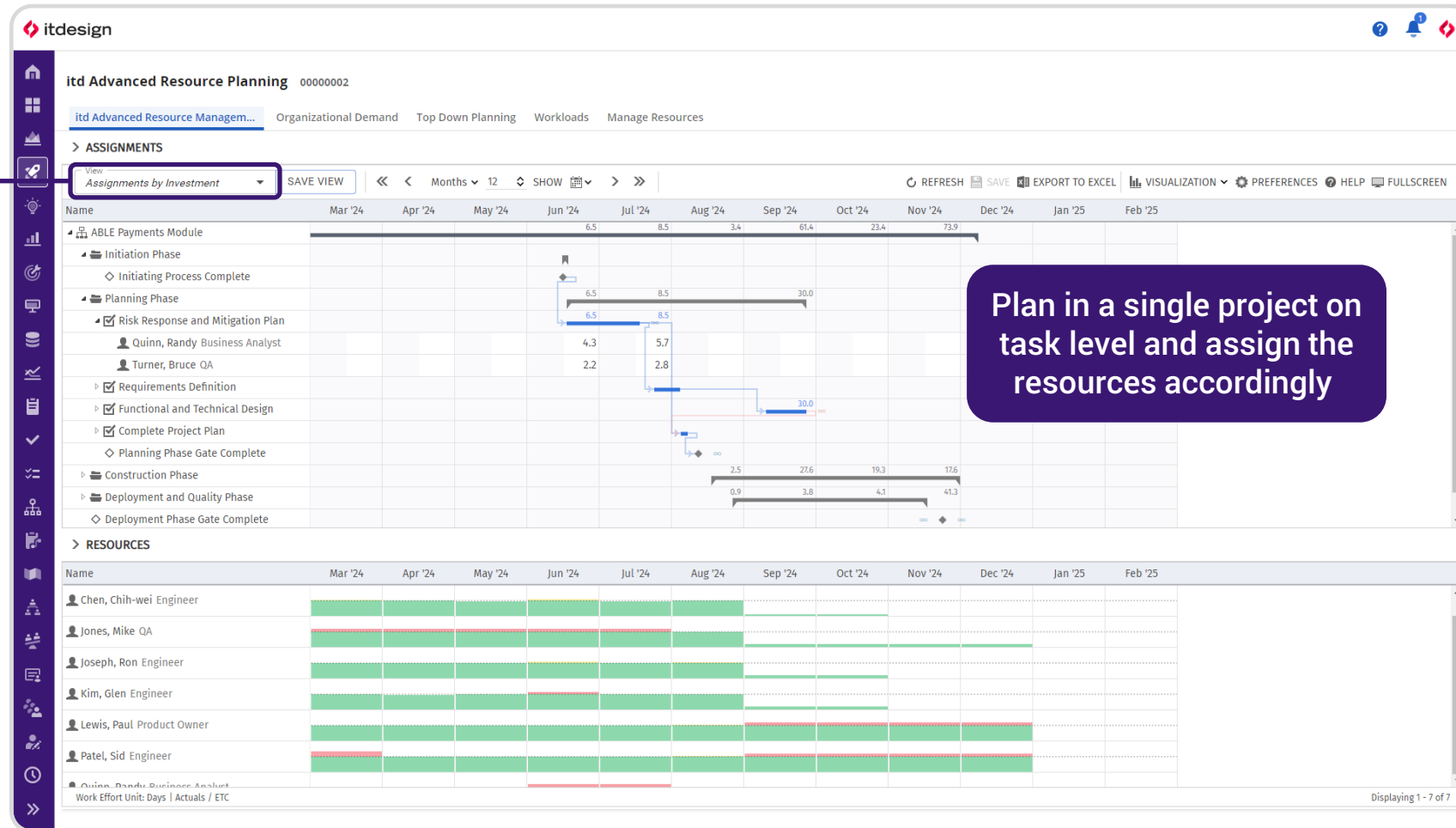
	A	B	C	D	E	F	G	H	I	J	K
1	Name	Start	Finish	Jan '24	Feb '24	Mar '24	Apr '24				
2				Planned Allocation	Remaining	Planned Allocation	Remaining	Planned Allocation	Remaining	Planned Allocation	Remaining
3	Amos, Cheryl	10.6.2023	31.12.2024	19,6	3,4	19,2	1,8	23,0	-2,0	23,2	-1,2
7	Andersson, Peter	29.2.2024	4.5.2024	11,5	11,5	10,5	10,5	20,5	0,5	21,0	1,0
10	Awad, Rashid	1.1.2024	30.9.2024	29,8	-6,8	22,3	-1,3	19,0	2,0	23,0	-1,0
16	Barry, Debra	23.1.2024	20.9.2024	19,6	3,4	19,2	1,8	19,2	1,8	19,4	2,6
19	Berry, Jason	10.3.2024	27.6.2024	4,6	18,4	4,2	16,8	19,2	1,8	19,4	2,6
22	Bhatt, Rakesh	1.3.2024	26.8.2024	0,0	23,0	0,0	21,0	10,0	11,0	15,6	6,4
26	Chasen, Nicole	1.4.2024	31.5.2024	4,6	18,4	4,2	16,8	4,2	16,8	9,4	12,6
29	Chen, Chih-wei			21,0	2,0	21,0	0,0	21,0	0,0	21,0	1,0
32	Childers, Valerie	1.1.2024	5.9.2024	3,0	20,0	19,0	2,0	19,0	2,0	19,0	3,0
36	Clark, Patrick			4,6	18,4	4,2	16,8	4,2	16,8	4,4	17,6
38	Clarke, Stanley			23,5	-0,5	22,5	-1,5	22,5	-1,5	22,0	0,0
41	Coleman, Joyce	23.1.2024	20.9.2024	6,9	16,1	10,1	10,9	12,9	8,1	12,9	9,1
44	Derrickson, John			11,0	12,0	11,0	10,0	11,0	10,0	11,0	11,0
48	Dixon, Danielle	5.3.2024	17.6.2024	230,0	-207,0	6,9	14,1	19,7	1,3	22,0	0,0
51	Evans, Sean			4,6	18,4	4,2	16,8	4,2	16,8	4,4	17,6
53	Feinle, Kurt			14,6	8,4	14,2	6,8	14,2	6,8	14,4	7,6
56	Garcia, Noa			23,0	0,0	20,0	1,0	20,0	1,0	20,0	2,0
59	Gillian, Erin			4,6	18,4	19,2	1,8	19,2	1,8	19,4	2,6
62	Gupta, Minesh	5.3.2024	18.9.2024	4,6	18,4	4,2	16,8	19,2	1,8	19,4	2,6



# Assignment by Investment View

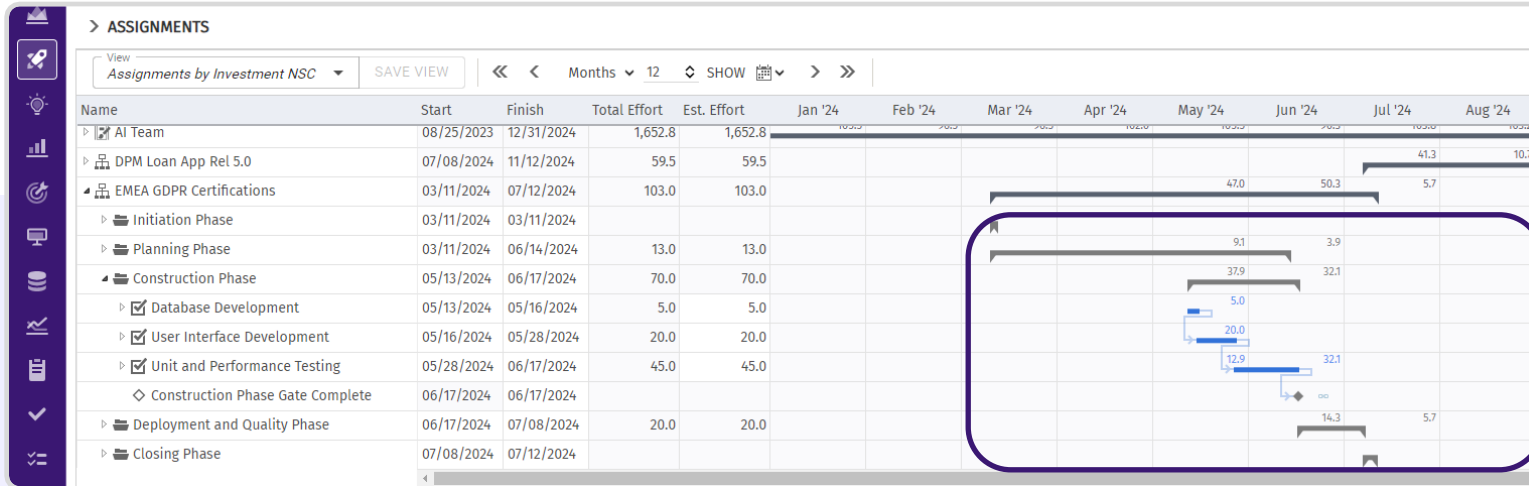
# Detailed Overview of Assigned Resources

Assignments  
by Investment  
View

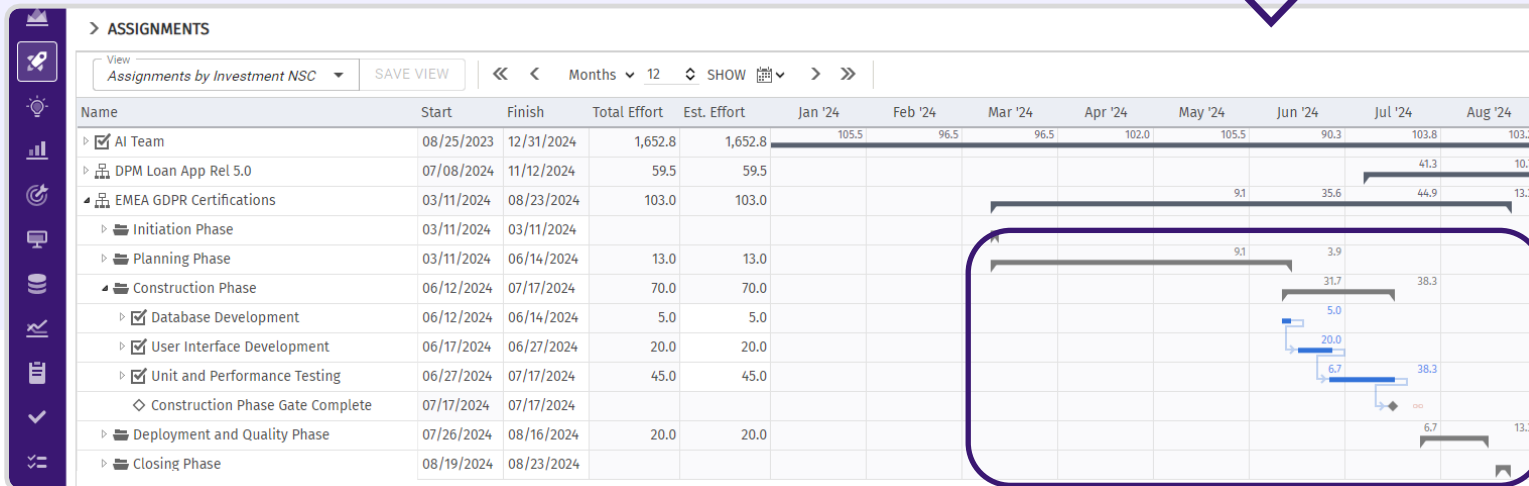




# Tasks and Phases Can Be Moved or Resized



By moving a phase, all related tasks are moved as well



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