

# PLANTA – Powerful Toolkit for Hybrid Project Management



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Software company PLANTA seamlessly integrates a whole range of software components in their software suite to facilitate planning and controlling of projects and project landscapes. PLANTA's core product is *PLANTA project*, a renowned software for project and multi-project management. Coming with a comprehensive functionality, the software even allows to handle large-scale engineering and plant construction projects. Some of its particularly outstanding features are the extensive scheduling functions and detailed cost management. Smaller projects often pose less demanding requirements and instead call for a well-structured collaboration platform. For such projects *PLANTA pulse* provides functions for team collaboration and task boards which allow to coordinate the operative business. For those who are more interested in strategical planning, *PLANTA portfolio* offers a solution for project portfolio shaping and optimization.

All three products can be connected seamlessly: If, for instance, a project in *PLANTA pulse* becomes too large so that you run the risk of losing the overview of the different boards, you can simply carry out an outline scheduling in *PLANTA project* to keep an eye on the greater picture. If, on the other hand, a schedule in *PLANTA project* becomes too detailed, larger-scale work packages the details of which the teams can then work out in *PLANTA pulse* may come in handy. This tool-interaction also pays off in resource and finance planning. The greatest benefit, however, is that *PLANTA pulse* provides team members with a plain, intuitively operable user interface. After all, only the project managers need powerful functions for project planning and controlling. PLANTA's software is flexible and adapts to the required project management processes.

## PLANTA project for Traditional Project Management

The central tool of PLANTA's product range is *PLANTA project*. The software, which can also be run via web browser, addresses all those who want to carry out in-depth planning of projects while keeping a clear overview of all projects in multi-project management. Such an overview is provided by the multi-project board (Image 1). It shows execution periods and key milestones of individual projects in the form of a Gantt chart.

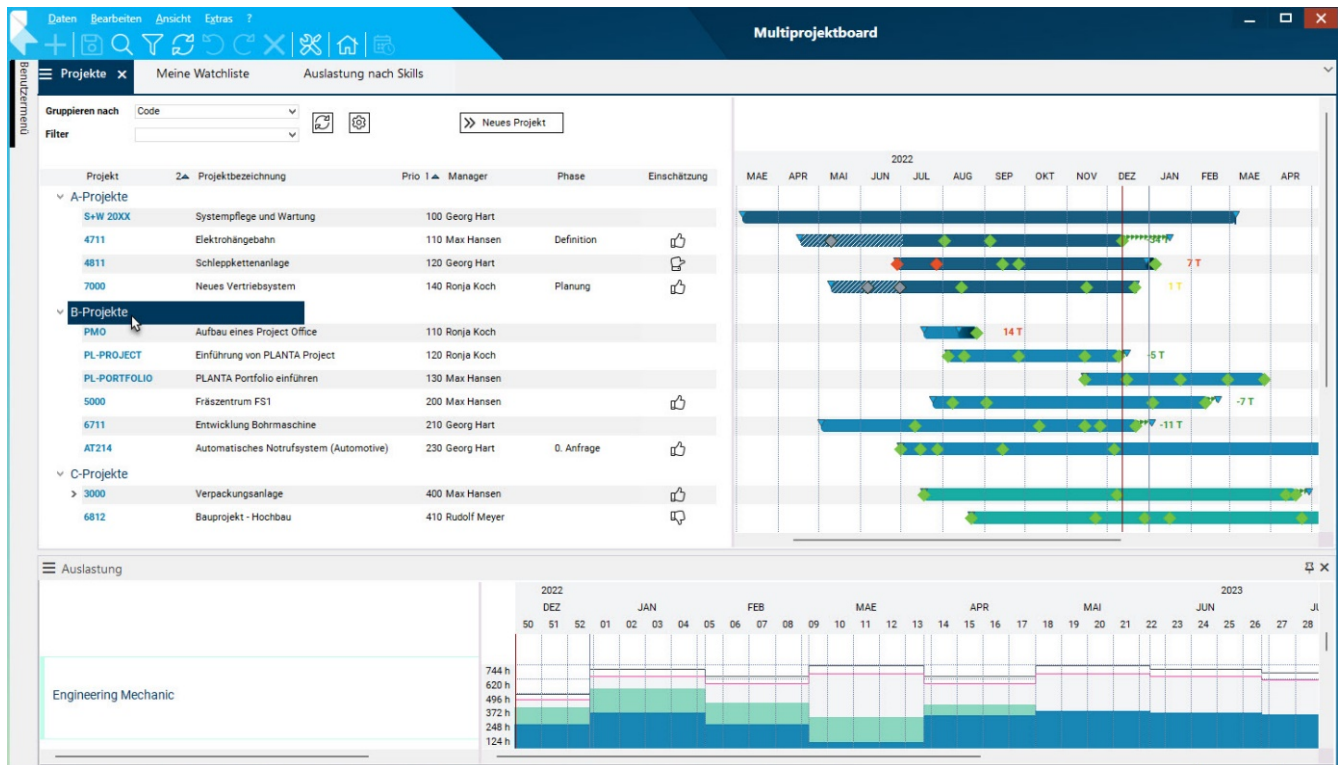


Image 1: The multi-project board provides a summary of programs and shows resource impact

In the compact Gantt chart of the multi-project view the status of the different projects is visible at a single glance. PLANTA *project* indicates relationships between projects by small arrows for incoming and outgoing dependencies. Further details can be displayed by simply clicking on them.

At the same time the multi-project overview presents a good access point for individual projects, allowing you to go directly to the respective in-depth planning. Typical project management functions like work breakdown structure and scheduling in a Gantt chart are integrated in the software by default. In PLANTA *project*, the work breakdown structure is even represented graphically and scheduling is extraordinarily sophisticated: Date restrictions, requested dates, manifold dependencies and accompanying processes with calculated duration should leave nothing to be desired, even when you are dealing with complex projects.

The software also shows planned costs and resources directly in the schedule. They are displayed below the corresponding activities (Image 2). As far as for project resources, PLANTA *project* takes into account both entire departments and named team members. Furthermore, the project personnel can be planned by skills, i.e. the individual skills of the employees involved in the project. This enables you to carry out a rough resource planning at the early stages of a project to evaluate the general feasibility of a proposal. At a later project stage you can then go into a more detailed planning for specific team members. For this purpose, the program supports a workflow to request resources from specialized departments. The request is then checked against the team utilization of the specialized departments

which subsequently delegate one or more specific team members to participate in the project in order to fulfill the demand.

PLANTA *project* takes planned resources with their project cost rates into account and can handle additional planned costs, e.g. for material and external services. Just like the requested and approved budgets, the resulting projected sums can be divided by periods and cost types. Actual costs which incur at later project stages are usually imported by PLANTA from financial reporting systems like SAP via interfaces.

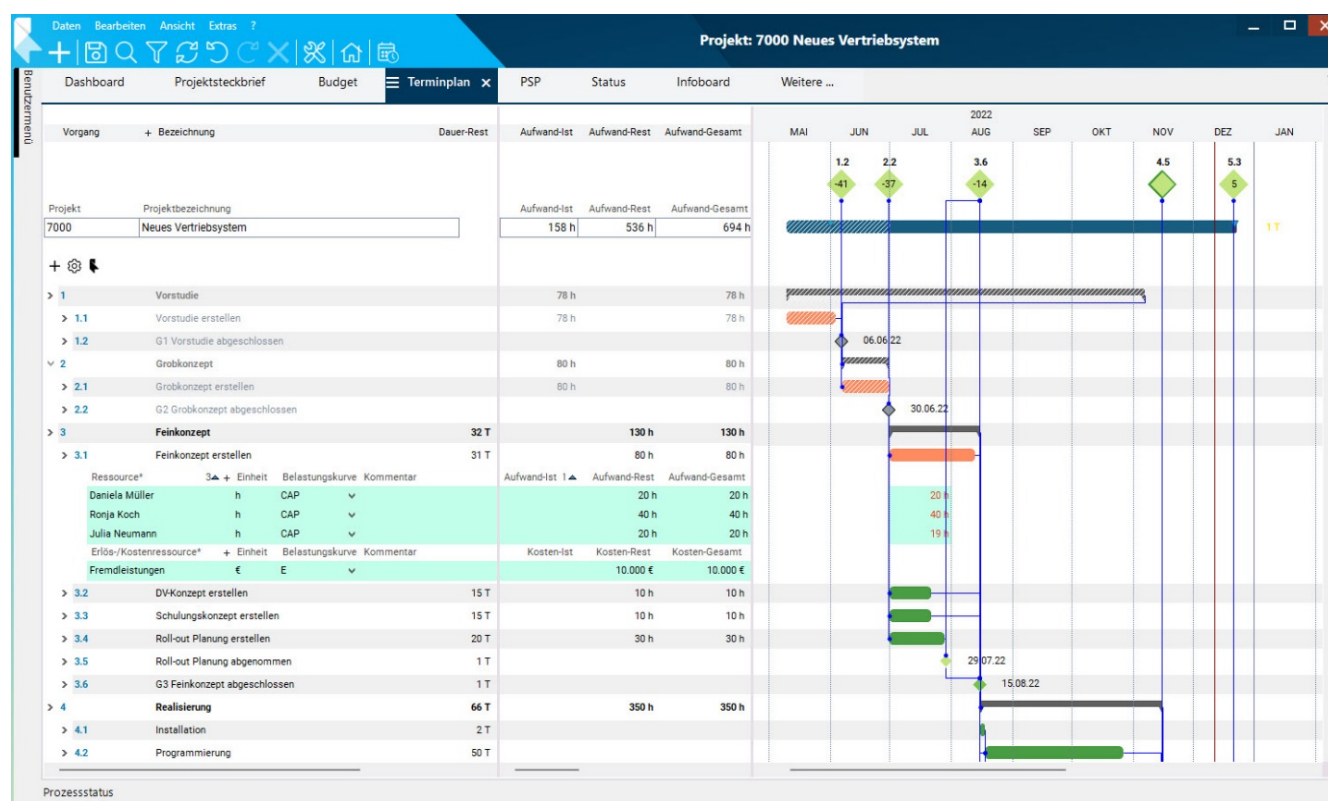


Image 2: Resources and costs can be planned on any WBS level.

During project execution, PLANTA *project* supports its users by functions such as time recording, milestone trend analysis, earned value analysis, and also a special status report. In addition to mere data summarization and the creation of an analysis, the latter provides a means for project managers to write comments and thus complement the project data by individual estimations. The resulting status report can thus be considered as a combination of calculated key figures and individual evaluations made by the project managers. It is released once it is complete. At the same time, the program saves a snapshot of the project to facilitate the comparison between different status reports.

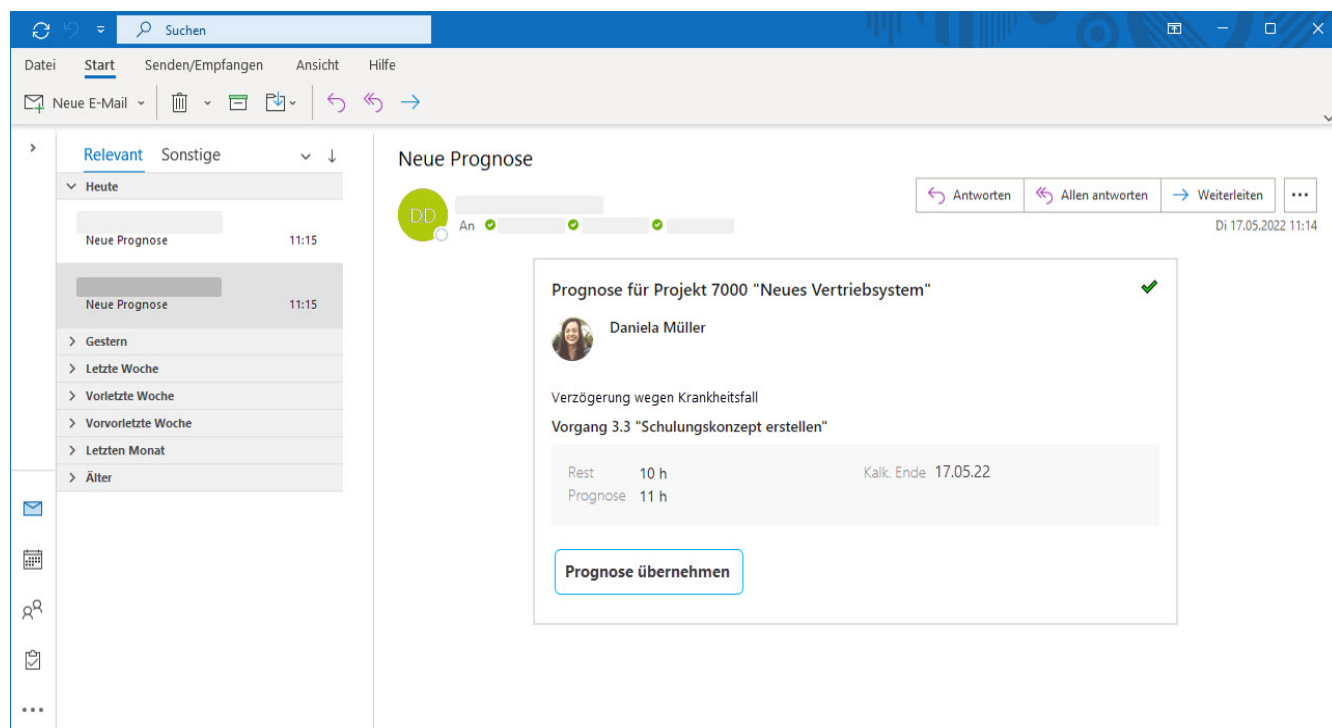


Image 3: React quickly in your workflow: Adaptive Cards allow you to do this directly in the e-mail.

The latest version of PLANTA *project* now also uses Microsoft Adaptive Cards. This standard allows applications from different vendors to exchange active content. Thus, it is possible to send an Adaptive Card to the project manager via e-mail as a reaction to time recording with updated remaining effort (Image 3). The project manager can then verify the new forecast directly within the e-mail and apply it to the project planning at the click of a button if desired. An option for approving project phase changes in this way is soon to come.

The next step on PLANTA's roadmap is an administration tool that allows users to adapt maps to their own requirements. The concept is convincing: This way, persons involved who hardly use the PM software can be integrated via the applications they use on a regular basis. This is also facilitated by an also available PLANTA *pulse* interface to the integration platform "Make". A standard connection to the Microsoft power platform would exploit this potential even further. However, it is already possible to establish such a connection individually via REST interfaces.

## Clear Task Overview for the Project Team

The standalone software PLANTA *pulse* is the go-to tool for mere task management in smaller projects. In larger projects it can be combined with PLANTA *project* – but we will get to that later. First of all, the program provides flexible boards via which project teams can coordinate their tasks. The respective processing time can be documented directly on the individual tasks.

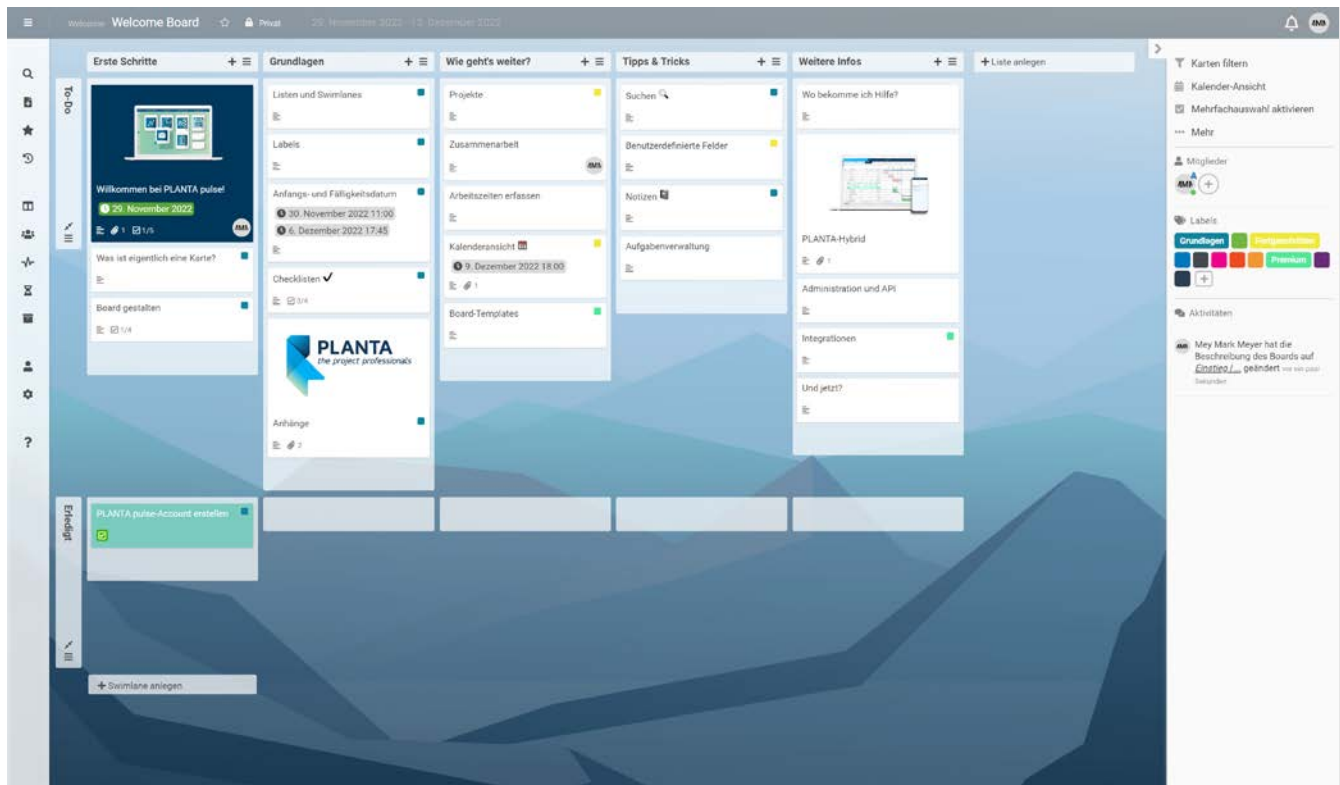


Image 4: A task board in PLANTA pulse

When logging on to the program, PLANTA *pulse* shows a welcome board (Image 4) on which numerous task cards with explanations on the program operation are stored. By clicking through these cards users get a first impression of the program operation as well as extensive information on the software. This already provides a sufficient basis for getting started – if anything, the team will only require a short briefing.

The task cards are the core element of each task board. The software aligns them in lines and columns called swimlanes and lists. This alignment has no impact on the card properties, e.g. on the processing status: If you move the completed task to the "completed" swimlane, the board becomes more clearly structured, however, a task will only be marked as completed when you set the respective checkmark in the task's properties.

In addition to a description and a due date you can also attach documents to each card. This allows the team to find all required information in one central place instead of having to gather it from various places. Categories which can be defined in the board administration help to group the tasks. Other properties can be added as well, e.g. to allow an IT department to document the IT system affected by a task. The board can of course be filtered by all of these properties.

Checklists can be added to process a task in several single steps. While the task is processed, the individual items in the list can easily be checked off. On the board, PLANTA *pulse* shows the number of al-



ready completed checklist items. Furthermore, the team can write comments on the tasks. This way, instead of sending countless e-mails, the discussion takes place in the comments section while working on a task. This ensures that the discussion remains visible for all team members involved in the task.

PLANTA *pulse* provides project teams with a simple to use and flexible task board for project execution. The high flexibility provided by columns, swimlanes, and card properties requires a certain degree of coordination in the project team to clarify how the functions are to be used. However, this coordination effort should not exceed that of a regular kick-off.

If a project is more extensive, you can simply create several boards to group the tasks of different teams. In these cases it is worth taking a look at the connection between PLANTA *pulse* and PLANTA *project* as a hybrid solution.

## A Hybrid Combination: Pulse and Project in Interaction

By connecting PLANTA *pulse* and PLANTA *project* you can multiply the task board's benefits. The combination does not only make sense for smaller or agile projects but it can even benefit large-scale projects. Another advantage: The projects which exist in PLANTA *pulse* also become visible in PLANTA *project* and thus also in the overall portfolio.

Using both products together allows for hybrid procedures. PLANTA *project* offers functions which even allow for in depth planning and controlling of large-scale projects. However, sometimes such a detailed and advanced planning is neither possible nor necessary or desired. But running an extensive software just to keep an eye on the activities of a small-scale project? Such demands rather frighten off users instead of increasing the acceptance of a software.

Consistently, this is not necessary in PLANTA products. Team members simply use PLANTA *pulse* where they work out the details of work packages or entire project phases. The general project life cycle planning, on the other hand, is done in PLANTA *project*. Here, instead of working with a detailed schedule users rather deal with large-scale work packages, the detailed tasks of which the team in charge coordinates with the boards in PLANTA *pulse* in an autonomous manner.

Both worlds can quickly be connected. Instead of further subdividing a task in the schedule you can simply select it as "to be synchronized". PLANTA *project* then creates a board for this task in PLANTA *pulse*. The execution dates for scheduling are displayed on the board. Vice versa, the number of pending and completed tasks is shown in the schedule (Image 5). Thus, project managers are provided with a more clearly structured schedule. Cost and resource controlling work as before – and the implementing team receives its own intuitive tool for their part of the project.

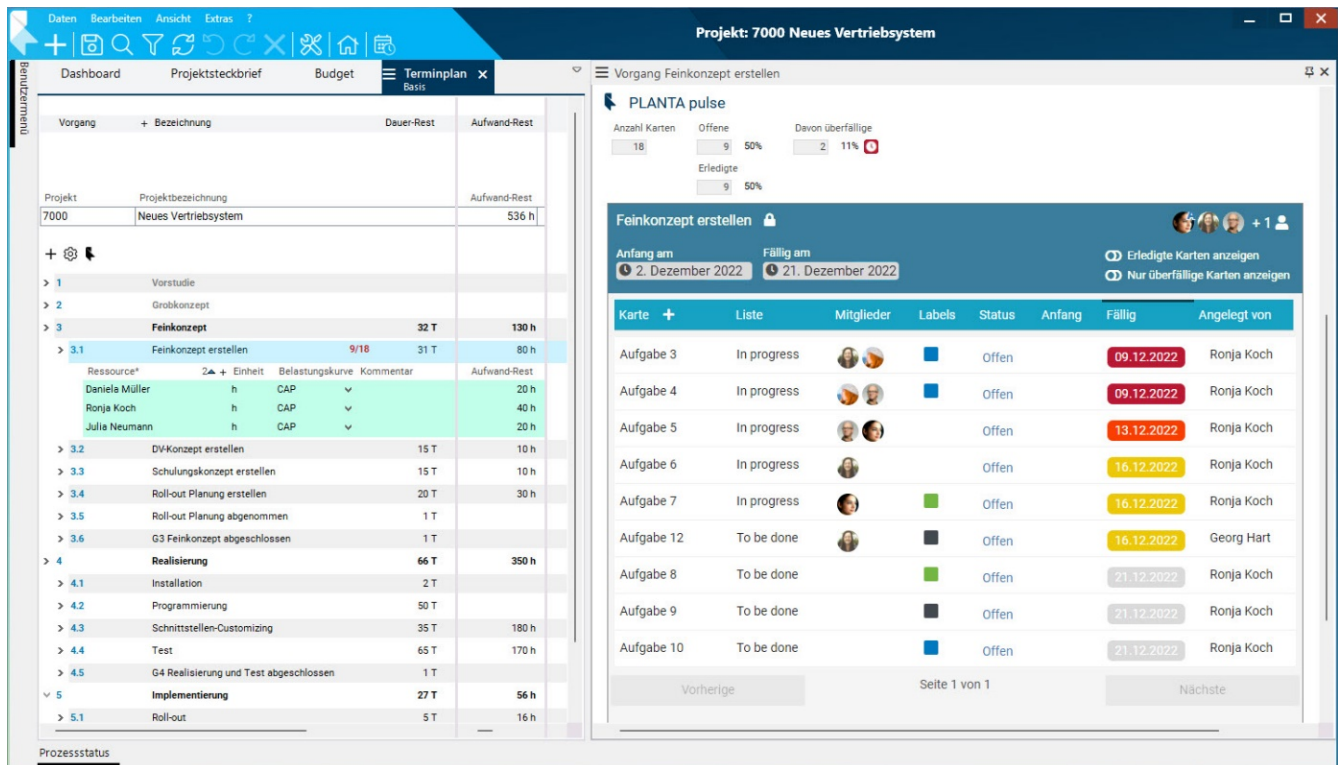


Image 5: Well-functioning team: the project schedule in PLANTA project and the task management in PLANTA pulse

Resource management is synchronized as well. The team members assigned to a task in PLANTA *project* automatically become board members in PLANTA *pulse* and vice versa. There is also a smooth interaction in time recording: The team can either document the time invested in the project on the respective individual activities in PLANTA *pulse* or use the time recording forms available in PLANTA *project*. In any case the values are all gathered in PLANTA *project*, which not only allows for planned-actual comparisons of individual projects but also for an analysis of the entire project landscape.

## Making Well-Founded Decisions in the Portfolio

PLANTA *project* is also an absolutely suitable tool for the Project Management Office (PMO). The software's multi-project and multi-resource analysis already provide a good overview of the project landscape. Thanks to status reports, the PMO always receives summarized and founded information on each project in the portfolio for the multi-project perspective.

The software not only analyzes this portfolio but also supports the PMO in its efforts to actively shape it. Here, template libraries can be a possible tool which allows the PMO to supply entire project plans for typical project types and thus promotes the standardization of project plans. Furthermore, projects can follow a so-called process model in which particular checklist aspects are defined for each project

phase, which are then transmitted to individual project team members (Image 6). PLANTA *project* then makes sure that these checklist items are completed before moving on to the next phase.

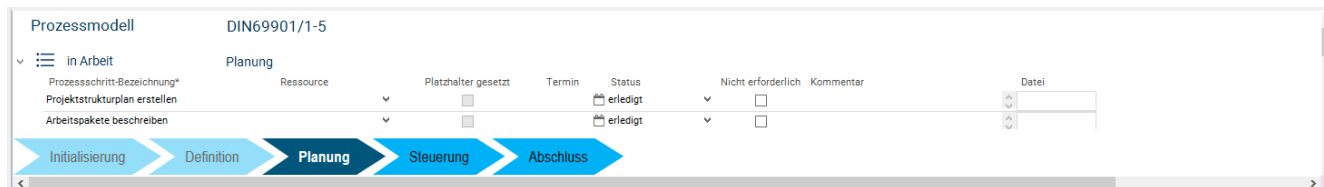


Image 6: The process models track the tasks required for each respective project phase

From a typical PMO point of view, projects already start long before their kick-off. The idea or proposal phases are thus already established prior to the planning and execution phases of a project – just as defined in your own PM processes. In these phases the project charter which describes the new proposal is key (Image 7). In the project charter, you can outline the project content in the sense of a project proposal and name objectives, desired financial key figures, and stakeholders. For strategic objective contributions or risk evaluations, the PMO configures appropriate questionnaires. From the answers obtained the software then calculates the corresponding KPI for the new proposal. Once the potential project has been described in detail, you can create the project proposal directly in the system and forward it by means of an approval workflow.

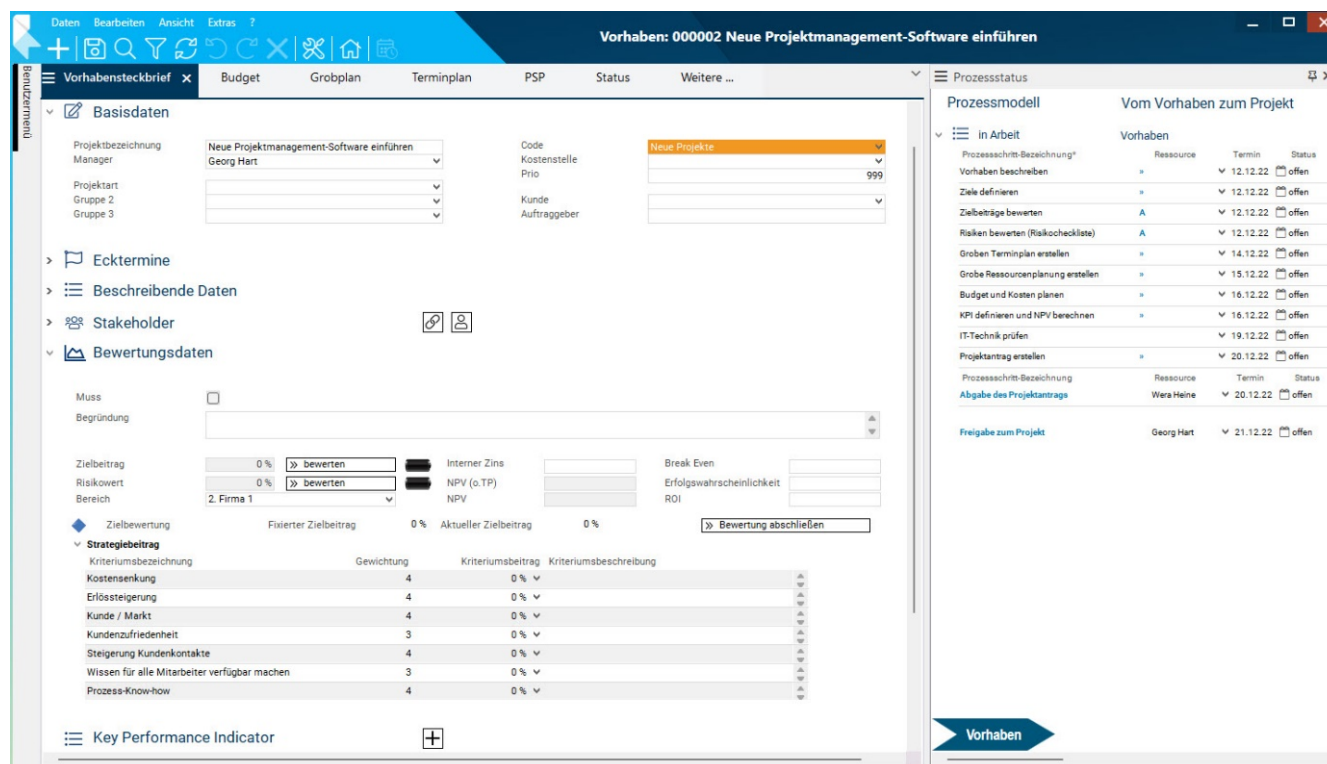


Image 7: For project ideas and project applications the core data gathers all required information.



If you do not only want to approve project ideas but also want to put together a good and realistic portfolio from several generally suitable project ideas and the already running projects, you have to compare the benefit of the projects with their costs of realization – whether in terms of personnel or financing. In any case, you will have to verify whether a portfolio can be realized with the existing resources.

PLANTA *project* already provides many instruments for this task, e.g. evaluation functions, resource overviews, and graphical evaluations. For in-depth analyses, the third component, PLANTA *portfolio* comes into play. It enables you to combine running projects as well as project ideas or other possible future projects in simulations (Image 8). In a simulation you can move, for example, entire projects or cancel running projects to include new project ideas in the portfolio instead. The software shows the impact on personnel demand and financial requirements without requiring you to make real changes to the in-depth planning of the individual proposals.

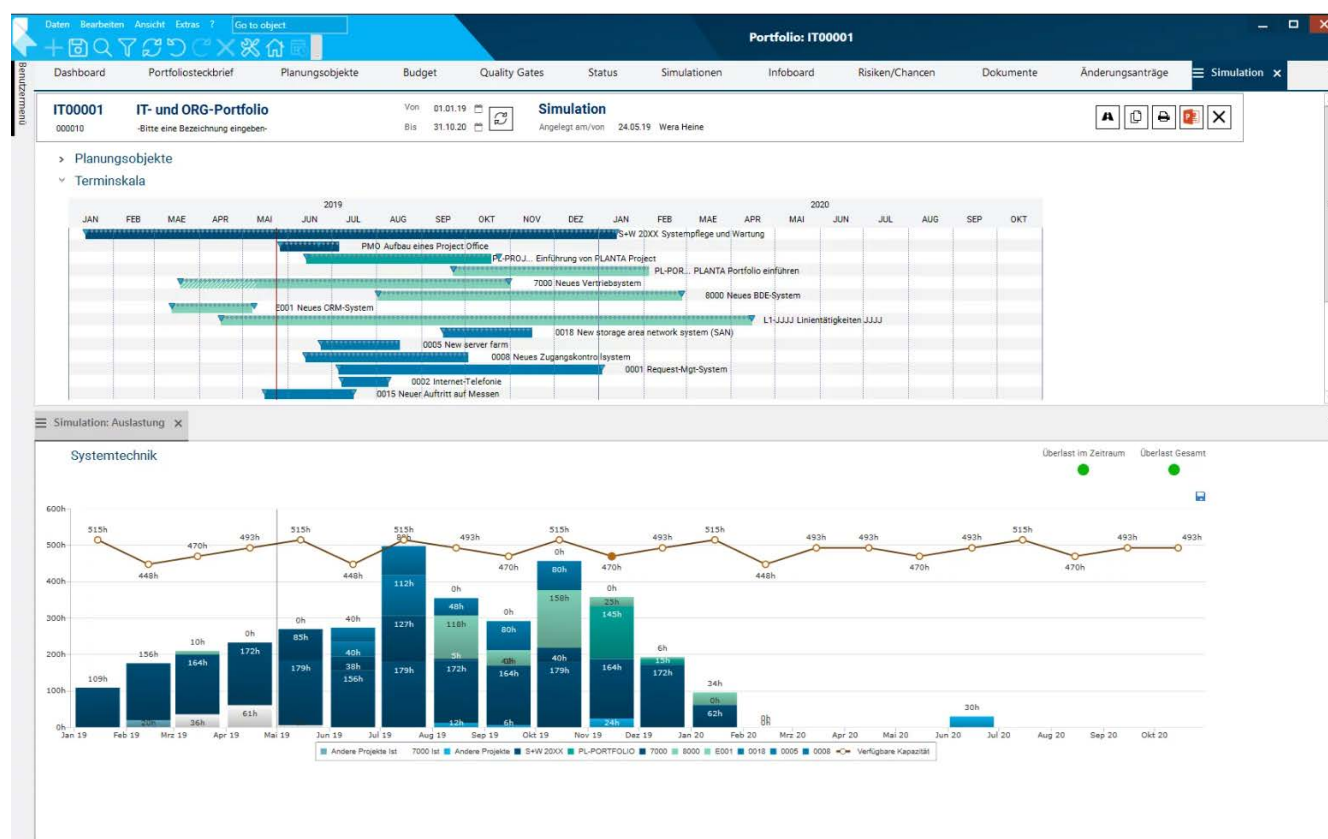


Image 8: Simulations give an answer to the famous question "What if ...?"

Choosing projects for a portfolio is only one aspect of portfolio management. PLANTA *portfolio* also records the objectives and key figures of the portfolio itself. If, for instance, a decision for a new digitalization offensive is made, objectives, risks, opportunities, and budget of the corresponding portfolio are to be described on portfolio level first and the respective evaluation criteria for possible projects are specified. Subsequently, you gather the corresponding project ideas from PLANTA *project* and combine them for an optimal utilization of the portfolio resources.

## Licenses

PLANTA offers the products as a SaaS solution for a monthly rental fee. This is particularly helpful for a quick access to PLANTA *pulse* and also saves you a lot of administrative effort when you use all components in a comprehensive hybrid approach. However, you can also run the products on your own servers – including PLANTA *pulse*.

In its BASE version, PLANTA *pulse* is free of charge for small teams of up to five team members and includes all essential functions. The PREMIUM version with all functions is available at 5 to 9 Euros per license and month, depending on the number of acquired licenses. So-called hybrid editions include the licenses for PLANTA *pulse*, PLANTA *project*, and possibly also PLANTA *portfolio*. This edition allows you to use all functions of PLANTA *pulse* and PLANTA *project* at 15 Euros per license and month.

## Conclusion

PLANTA's product range covers a broad field. It ranges from the strategic alignment of the project portfolio with PLANTA *portfolio* via in-depth planning and precise controlling of projects in PLANTA *project* to the tracing of any small task which may just have been discussed in a project meeting in PLANTA *pulse*.

The three components of the software suite each offer adequate functions and user-interfaces. They link information in such a way that it can always be viewed coherently in its context while not every small change is immediately reflected throughout the entire portfolio. Access to the task boards is simple – this allows the project management to have the entire project team working actively in the software while being able to integrate the information in their own project controlling.

The close connection between the three components allows you to set up an integrated project information system which is adapted to company processes and covers project management from strategic planning to detailed tasks. Here, the individual components each provide role-specific tools. This way, the solution remains clearly arranged for everyone who works with it despite its strong performance. But the idea of integration does not only include PLANTA products: It is already possible to use Atlassian JIRA instead of PLANTA *pulse*. Adaptive Cards will soon make it even easier to interact with other applications used in the company, especially Office products. PLANTA thus presents itself as an efficient and flexible tool for project tasks of any kind.