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Innotas Enterprise PPM

Steve Cotterell thinks that this system can handle more than its target IT projects market.

I was watching a demonstration of Innotas Enterprise PPM that was being given by Ian Carvell, the UK Sales Director. He suddenly exclaimed: 'I have found Jesus! Wow!' That's certainly a level of functionality that I've not come across before. Sadly, it turned out that Jesus was the first name of a Help Desk resource that he was looking for – but, just for a moment, I almost wondered if Innotas had managed to include a 'Divine Intervention' feature. Now that would be useful! Innotas are, however, convinced that their product will be the salvation of managers struggling to deliver IT projects.

Innotas Enterprise PPM is a Web-based SaaS system for managing IT project-based businesses that is aimed at organizations of all sizes.

Worldwide, it has more than 100 customers with in excess of 12,000 users. The system has been available in the UK for about a year and, so far, had attracted five customers with about 1,000 users. The system aims to deliver IT projects but also manages 'business as usual' operations. Innotas EPPM can interface with other applications, such as such as internal help desk systems and CRM systems, and also features SAP and ERP interfaces for reporting purposes.

The system uses the Akamai hosting system to speed up the two-way transmission of data, which is encrypted using 128-bit SSL. Users can arrange IP pages to access the application to be available in-house only – ie, not available from anywhere on the Web – but so far only some larger enterprises have availed themselves of this facility.

The data is backed up every 50 minutes to an off-site location. Innotas has achieved the USA SAS70 certification for their handling of data security.

At the configuration stage (Innotas's aim is to implement a new system within two to six weeks), the application can be tailored and customised to the client's requirements, to add, remove or rename fields, change the terminology used and so on. Organizations can start with a basic system and add features as they mature; in fact, they're encouraged to work this way.

All configured items can later be edited by the System Administrator – who will have received the appropriate training at the outset. Up to two people are trained for the £16,000 fee and up to five for the £35,000. Start-up training takes two or three days. Training thereafter is provided by the Innotas 'customer success manager' who also provides the support. Additional training can be provided at extra cost (for new system administrators and the like).

Having visited www.innotas.com and logged in with your user name and password, the first screen you see tells you how many notifications you have and shows a list of the dashboards you have available.

Dashboards are real-time representations of the data in the system and each is made up of a set of reports – about 80 standard reports are included in the system and you can also compile your own reports, which can then also be included on dashboards.

A company director may choose to see the 'overall enterprise portfolio' dashboard which gives an overview of the entire enterprise portfolio, split into the programmes running within the organization. Within each programme, the projects are listed with a 'project health indicator' icon (based on a calculation involving time, cost and quality) and basic progress information. Next to that is a real-time graph that illustrates the current position, which can be drilled into, down to the lowest level of original data.

The application includes five additional out-of-the-box dashboards showing capacity and demand, project status, operational portfolio and resource usage. Other dashboards can be created by the user, on the fly, by coupling together a set of reports using drag and drop functionality. The

A dashboard containing budget information

standard dashboards listed above are available to the whole organization. Some standard project-specific dashboards are also provided and others can be set up.

The configuration of the system is based around the roles of the individuals using it and aims to provide the correct set of information for each role via a series of tabs.

Proposals, from all sources, are received and channelled either as projects or as operational work which is then prioritised and its delivery managed. Requests for work can be raised

A new (to the UK) Web-based SaaS system that is aimed squarely at organizations managing IT projects.

A portfolio Gantt chart

manually or automated through integration with, say, an organization's help desk system.

These requests are captured. They are given an ID number and entered into a configurable approval cycle. The current status of each request is detailed on the 'Requests' tab.

On the 'Projects' tab each project manager will see a list of their own projects – this list can be filtered according to the status of the projects. If you click on a project in the list, you can open the project's Gantt chart or a spreadsheet-style view of the project's task data. You can drill into each task to view the most detailed task information. Time and expense information can be entered against tasks at this level and the project dashboards can also be accessed at this level.

Risks and issues can be tracked at both project and task level via a configurable system. Documents and other files can be attached to tasks and projects, either as pointers to local addresses or with the files held on the Innotas servers.

The resource managers would be concerned with the information held on the 'Resource' tab. They can display a colour-coded list of resources within their team, showing where they are allocated and the levels of their commitment. Filter searches can be used in connection with this list. You can also show details of capacity by role, showing the role's under- or over- staffing and, again, you can drill down to project level.

Another chart shows the staffing and demand, project by project and role by role – colour-coded to show staffed and unstaffed positions.

Each person has a record in the system that contains their personal, skill and competency information. When resourcing a project, you can search this database to find the appropriately skilled people you need. Possible candidates can be listed in the order of their suitability and availability.

Displayed under the 'Portfolio' tab is a summary of budgetary information, rolled up from all of the projects within the organization and beneath the 'Applications' tab is a similar set of budgetary information about the operational systems that are being supported.

You define the details of your customers on the 'Customers' tab, stating whether they are internal or external and specifying the rates they pay for work done – which can be detailed down to role and individual resource level and includes standard and overtime hourly rates. The application can be configured to hide specific information from various roles and/or individuals.

All users have a 'My Arena' tab which displays the specific information that person needs to be aware of, held on a series of 'sub' tabs. Each of these sub-tabs displays a figure beside its heading that indicates the number of un-actioned entries on that tab. The tab headings include 'Time and expenses', 'Approvals', 'Requests' (here you can create, manage and approve requests), 'Risks and issues', 'Tasks' (you've been assigned to, drillable for details) and 'Attachments' (a personal list but items can be made public). This is where you could store the code that you're working on, in a secure but private environment, after you have checked it out from the main store. The system keeps a record of when you checked documents out and back in.

Gantt data can be imported from and exported to MS Project files and exported to Excel spreadsheets.

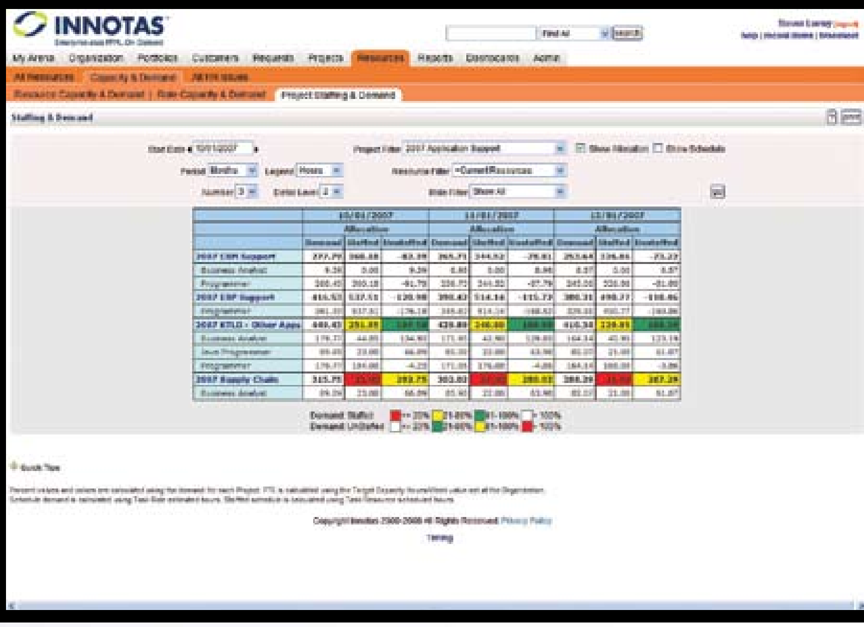
The Gantt chart is fairly basic. Dependencies are shown, but the chart isn't interactive. All four dependency types are supported and links are screened for circular logic errors.

A short red line at the end of each Gantt bar shows the projected completion date of the task. On one Gantt screen the projected end date of a summary bar seemed to be inexplicably missing and the same summary bar was marked as a predecessor to one of its tasks – this shouldn't have been possible but, despite having spoken to support people in both the UK and the USA, I haven't been able to discover what went wrong. However, I have been assured that, whatever caused the problem, it's unlikely to re-appear in the improved Gantt due out this Spring (see below).

In the 'projects' view, all of the projects within the system can be displayed as a drillable, overview Gantt chart which can be filtered according to some pre-set criteria (owner, milestones, priority, status and business unit – but this list is also configurable as are the filters).

Reports can be saved, printed and output as pdf files. To create a new report you can take a report that is similar to that which you need and then either make a copy of it and edit that, or edit the original report. Opening the 'Report Builder' you choose which fields you want to include in it by putting ticks in checkboxes – which creates columns or sections on the report to display that information. New reports can also be created from scratch. You can specify who can see the report.

A resource capacity and demand screen



New dashboards are created in a similar fashion and, from a list of available reports, you specify which are to appear on the dashboard.

To start a new project, you go to the 'My Arena' tab and select 'Create Request'. Having filled in the basic information and gone through the (configurable) approval process (during the approval cycle) approvers can add notes and attachments. At the final approval stage, the final approver adds the project to one of the organization's programmes. A new programme would need its own request and approval process. Templates can be used to create new projects.

Budgetary and financial information is added and the tasks are listed.

The new tasks can be resourced by adding team members by name – if no team exists then one is built by selecting them from the resources available – choosing roles and defining the skills and competencies required. As you perform these tasks, an audit trail of your actions is logged.

Having assigned the roles and (possibly) the individuals, your request for these resources is sent to the appropriate resource manager(s). Emails are automatically sent to the resource managers, notifying them of the arrival of your request, which contains the URL that takes them directly to your resource request. The resource managers can agree with your request or they can offer you alternative people.

Once the project's under way, people submit their actuals via timesheets. Your timesheet is available under the 'My Arena' tab but there's also a shortcut button always on the screen, in the top right-hand corner, alongside a 'Recent Item' button that allows you to quickly navigate back to the screens that you have recently been using.

When completing a timesheet, you select the period to be covered. You can use a 'Use a previous timesheet' button to pre-populate your timesheet with a previous week's information, which you can then edit, saving a considerable amount of time and typing. Innotas claims that most resources spend no more than five minutes per week completing their timesheets. The spaces that hold the actual hours worked on the pre-populated timesheet are blank, and into these fields you enter the hours worked on each task. You can use a 'Load all tasks' button to include details of all the tasks that you've been assigned to on the sheet. You complete the appropriate lines and save the sheet. Once you've submitted the timesheet, you can't edit it any more.

Only approved timesheets can be used to provide a template for the following week.

During implementation, drop-down lists of 'buckets' for administrative time, holidays, etc, can be set up.

Timesheets go through a configurable approval process and, once approved, the actuals are taken into the system. With the use of Innotas APIs, such data can be imported from, and exported to, other systems such as an accounting or HR system.

Risks and issues at both project and task levels are entered, and go through their own approval and monitoring processes.

IT service providers, who have made fixed bids for the completion of project work are catered for in that the system allows for the monitoring of work and the issue of invoices for work done against the contracts. As far as other work is concerned, you can use the report builder to assemble an invoice format to be used for time and materials expended against other work.

Although the marketing of this product is aimed squarely at IT organizations, given the system's configurability, I can see no reason why it should not be equally useful to any organization involved in any sort of change management situation, although it wouldn't be suitable for use in the building and construction industries.

The interface is, in some areas, a bit convoluted, with several screens and dialog boxes needed to go through to complete actions. However, there are plans afoot to tidy up and improve the user interface. It's also intended to lock column titles in view when a tabular page is scrolled and a what-if feature will be built in to the system. Also planned are improvements to the Gantt, which is intended to be made interactive. All of these improvements are due to be released during the Spring of this year.

Right to reply

Thanks Steve, an excellent review.

One of the main reasons PPM is a currently top of CIO wish lists, is it gives the ability for organizations to better prioritise and manage their projects without a large capital outlay. While no one can dispute the numerous benefits of PPM, many organizations have typically struggled to justify the costs associated with procurement and installation– a problem likely to increase with tightening IT budgets. The on-demand model has changed this paradigm, with the market growing at over 300% per annum over the last two years. With our focus on the IT marketplace, we have been able to dramatically reduce the amount of time required to become operational, with the typical implementation timeframe of under six weeks.

Innotas PPM also allows organization to manage and prioritise 'business as usual' activities as well as project work; the often forgotten element of IT can often represent as much as half of overall workload of staff. The real understanding of this workload provides real IT governance and true visibility of capacity v demand to ensure the right work gets selected and delivered.

We will be hosting a series of seminars in the UK in early 2009, so please feel free to contact me at rstocker@innotas.com to reserve a place or if you simply want more information.

Roger Stocker
Managing Director, Innotas (UK) Ltd

How much does it cost?

There is a one-off implementation fee based on the size of the system and the amount of effort required. Typically this is between £16,000 and £32,000. The monthly rental is £45 per subscription per month, or £450 per annum if paid in advance. This includes all support, maintenance and upgrades. All prices exclude VAT.

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