itdesign



Effective Multiproject Resource Planning and Capacity Analysis with itd Assignment Editor

itd Assignment Editor Version 3.0 allows you to plan assignments directly via the CA Clarity PPM web interface without connecting to Open Workbench or Microsoft Project. With this application, which is fully integrated into the standard CA Clarity PPM system, you can effectively edit assignments on a weekly, monthly or yearly basis for all projects. It is also possible to see a visual representation of current resource utilization with capacity overloads highlighted in a different color.

Carry out effective resource planning

A tree structure indicates the hierarchy of the project, subprojects, tasks and assignments (Work Breakdown Structure). Additional information, such as start date, end date, total expenditure and planned expenditure, is displayed for each element in the tree structure. Data can be entered directly over allocations shown up in realtime.

Workloads Allocations	Capacity Investments	itd Assignment E	ditor															
esource Planning: itd Assign																		×
1 Assignment Editor																		
iter - Assignments																		
ssignments																		
+ Depend all — Collapse all 👼 Gan		Open 🖥 Save 🥱 P	ninct 💥 Delete															
				_		<	-	-	-	-	Weeks 12	Show.		-	-		>	
	General	4				-					3000xs 12	No. Contra-	100000				_	4
lane	D	Total Effort	Est. Bifort	Start	Frish	Jan 2012 23.01	30.01	Feb 20' 05.02	13.02	20.02	27.02	05.03	Mar 2012 12.03	19.03	26.03	Apr 20 02.04	09.04	
Brcicle Building Process	PR1085	Total Enort		0 01/19/2012			0.0	09.02	13.02	20.02	27.02	05.03	12.03	19.03	26.03	02.04	09.04	
Develop USB stick for car keys	PR1113	0.0		0 01/15/2012		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
Ded View Editor for Clarity	P12523	0.0		0 03/01/2012		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
ad Assignment Editor v1.4	projekt1	\$3.2		2 01/16/2012		36.4	21.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
> (i) Indent / Outstent of Tasks	taskt	71.3		3 01/16/2012		25.0	20.8	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	
> (a) Engineering View	task2	0.0	0.0	0 01/22/2012	62/03/2012	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	i i
> Autoschedule	task3	7.0	7.0	0 01/23/2012	01/23/2012	7.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	i i
> (a) Right Click Context Menu	4	0.8		8 01/23/2012		0.3	0.3	0.3	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	
> (a) Focus Resource while Editing	task4	0.1	0.1	1 01/23/2012	02/10/2012	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	i -
4 (a) Automated Testing	47186	4.0	4.0	0 01/24/2012	01/24/2012	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	i -
E Derro, Derro	demo	4.0	4.0	0 01/24/2012	01/24/2012	4.0 1	10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1
Automated Builds	47184			01/24/2012	01/24/2012													
Publics on Filter for Resources	puldou n			01/24/2012	01/24/2012													
B Manuals for itd AddOns	P3423	0.0	0.0	01/23/2012	02/04/2012	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1
		0.0	0.0	01/01/2012	03/31/2012	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	i.
New Rich-Text-Editor for Clarity	PR1087	0.0	0.0	0 02/01/2012	03/31/2012	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1
ilter - Utilization rate																		
Itilization rate																		
	General	A	_	_		Jan 2012		Feb 20	312	1			Mar 2012	_		Apr 20	,012	
iane	D	Role Primary I	Role			23.01	30.01	06.02	13.02	20.02	27.02	05.03	12.03	19.03	26.03	02.04	09.04	
Analyst	Analyst	1				10.17-16.4	10.07-6.0	0.3/4.5	0.0/5.0	0.075.0	0.075.0	0.075.0	0.075.0	0.0/5.0	0.075.0	0.075.0	0.075.0	1
leveloper	Developer	1				13.07-13.0	10.0/-10.0	0.3/+0.2	0.0/0.0	0.0/0.0	0.0 / 0.0	0.0/0.0	0.0/0.0	0.0/0.0	0.0/0.0	0.0/0.0	0.0/0.0	
faterial	Material	1				13	1	2	0	0	0	0	0	0	0	0	0	
Administrator, Clarity	admin					0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0		0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	
Administrator, XC	xc_admin					0.0 / 5.0	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0		0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	
Demo, Demo	demo	Analyst				13.37-6.3	1.074.0	0.3/4.7	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	0.0/5.0	
Process Administrator	process admin					00/00	0.0/0.0	0.0/0.0	0.0/0.0	00/00	0.0/0.0	00/00	00/00	0.0/0.0	0.0/0.0	0.0/0.0	00/00	a l

Editing of assignments for all projects on a weekly, monthly or yearly basis via the CA Clarity PPM web interface

Effective multiproject resource planning

Resource utilization for all projects

Already compatible with CA Clarity PPM V13

Features and benefits

Advantages over editing in Open Workbench or Microsoft Project:

- No tool change required
- Faster ad hoc changes in less time
- Access to the entire resource pool and to all projects taking into account the CA Clarity PPM rights system
- Real-time display of resource utilization

Highlights

- Creation of new assignments with dragand-drop
- Project and resource filters
- Hierarchical tree structure
- Rapid editing of assignments
- Integration into standard CA Clarity PPM business logic

New assignments are created conveniently by selecting a resource from the resource utilization table and dragging it onto the tasks. The values for assignments can be entered directly into the table view; they are then automatically aggregated at the task and project level. Changes are applied to the CA Clarity PPM data model so that the same data are available for standard CA Clarity PPM evaluations. itd Assignment Editor is completely integrated into the standard CA Clarity PPM business logic and takes into account the CA Clarity PPM rights model.

An additional view allows planning from the resource perspective. Starting with a list of resources you can drill down to see all projects and tasks to which a resource is assigned.

Assignments																		
		oct 💢 Dolete		🛠 Preferences 🗌	🕯 investment >	Resource												
		General					4					Weeks 12	Show					
ueneral										May 2013				Jun 2013				
Name	D	Start	Finish	Loading Pattern	Total Effort	Est. Effort	4/1	48	4/15	4/22	4/29	56	5/13	5/20	5/27	6/3	6/10	6/17
> 🚰 Administrator, XC	xc_admin				0	0	0/40	0/40	0/40	0740	0740	0/40	0/40	0740	0740	0/40	0/40	0/40
🗛 Administrator, Nku	admin				382	130	0/40	0/40	0740	0740	0/40	0/40	0/40	0740	0/40	0/40	0/40	0/40
> 🚰 Demo, Demo	demo				671.4	628.4	0740	343.87-363	254.27-214	11.4/28.6	5/35	5/35	4/38	3/37	2/38	0/40	0/40	0/40
> 🏭 Analyst	Analyst				1,742.7	1,742.7	527-25.2	527-367.9	527-278.3	12/44.5	4.8765.4	0/75	0/76	0/77	0/78	0/00	0/80	0/80
> 🚰 Evans, Sean	evans				2,052.2	2,052.2	847-44	80/-40	847-44	40/0	4721-72	527-12	527-12	527-12	527-12	40/0	40/0	40/0
4 🏭 Doe, Jane	fb				1,478.6	1,478.6	12/28	12/28	12/28	12/28	12/28	12/28	12/28	12/28	12/28	12/28	12/28	12/28
Bicycle Building Process	PR1085	02/09/1000	01/03/2014		12	12	0	0	0	0	0	0	0	0	٥	0	0	0
Dnd View Editor for Clarity	P12523	02/01/2012	04/19/2013		313	313	0	0	0	0	0	0	0	0	0	0	0	0
4 📔 Mobile Time Tracking improvement	PR1086	01/01/2012	04/03/2013		200	200	0	0	0	٥	٥	0	0	0	٥	0	0	0
4 (3) Task 0815	z_0815	11/28/2012	11/28/2012		200	200	0	0	0		0	0	0	0	0	0	0	0
(i) dfg	sfg	11/28/2012	11/28/2012	Fixed	200	200	0	0	0		٥	0	0	0	٥	0	0	0
Financial Process Audit	PR1073	05/01/2012	07/01/2014		953.6	953.6	12	12	12	12	12	12	12	12	12	12	12	12
a 🏭 Coleman, Jayce	joyceColeman				13,510.3	13,510.3	3.4/36.6	1.3/38.7	1.3/38.7	1.3738.7	0.5/39.5	0/40	0/40	0740	0740	0/40	0/40	0/40
Bicycle Building Process	PR1085	02/09/1000	01/03/2014		40	40	2.1	0	0		0	0	0	0	0	0	0	0
Plan Bicycle	Bi-01	01/14/2013	04/03/2013	Uniform	40	40	2.1	0	0		0	0	0	0	0	0	0	0
Develop US8 stick for car key	PR1113	01/15/2012	04/30/2013		34.3	34.3	1.3	1.3	1.3	1.3	0.5	0	0	0	0	0	0	0
Manufacturing	54161	01/14/2013	04/30/2013	Uniform	34.3	34.3	1.3	1.3	1.3	1.3	0.5	0	0	0	0	0	0	0
# 📔 Ded View Editor for Clarity	P12523	02/01/2012	04/19/2013		13,436	13,438	0	0	0	0	0	0	0	0	0	0	0	0
(i) Test	Test	02/01/2012	04/19/2013	Uniform	13,123	13,123	0	0	0		0	0	0	0	0	0	0	0
(i) Test2	test2	03/05/2012	04/03/2013	Fixed	313	313	0	0	0	•	٥	0	0	0	٥	0	0	0
> 🚰 Expense Role	expense_role				30	30	0	0	0	0	- 4	7	7	7	7	0	0	0
E 🚜 Rooms	rooms				42	42	0	0	0	0	0	0	0	0	0	0	0	0
🗠 🚰 Material	Material				5	5	0	0	0	0	0	0	0	0	0	0	0	0
> 🏭 Patel, Sanjay	sanjayPatel				58.5	58.5	0740	0/40	0740	0740	0740	0/40	0/40	0740	0740	0/40	0/40	0/40
Developer	Developer				17,244.2	17,244.2	807-121.3	807-121.3	807-121.3	807-121.3	327-24.5	0/40	0/40	0740	0740	0/40	0/40	0/40
Hiler, Randy	randyMiller				0	0	0740	0/40	0740	0740	0740	0740	0/40	0740	0740	0740	0740	0/40
> 🚰 Gillan, Erin	erinGillan				637.6	637.6	0/40	0/40	0/40	0740	0/40	0/40	0/40	0 / 40	0/40	0/40	0/40	0/40

Planning from the resource perspective

Resource utilization monitoring

In addition to the innovative function of planning resources by tasks, an overview of resource utilization is provided for all projects by week or by month. When assignments are edited, the resource utilization tool is updated at the same time so that it is immediately apparent what the associated effects are on the remaining resource capacity. Resource overloads are highlighted in a different color. Resource utilization also takes into account role capacity, which is the capacity of resources for which a certain role has been entered as the primary role.

Utilization rate															
	General			Aug 2	011				Sep 2011			Oct 2011			
Name	Role	Primary Role	CW 31	CW 32	CW 33	CW 34	CW 35	CW 36	CW 37	CW 38	CW 39	CW 40	CW 41	CW 42	
Account Manager	1		0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0710,0	0,0 / 10,0	0,0 / 10,0	0,0710,0	0.0 / 10.0	0,0 / 10,0	0,0 / 10,0	
Analyst	1		0,0 / 10,5	0,0/9,4	0,0 / 14,9	0,0 / 15,0	0,0 / 15,0	0,0715,0	0,0 / 15,0	0,0 / 15,0	0,0715,0	0,0 / 15,0	0,0 / 15,0	0,0715,0	
Architect	1		2,07-43,4	0,07-41,4	0,07-41,4	0,07-41,4	0,07-41,4	0,07-41,4	0,07-41,4	0,07-41,4	0,07-40,4	0,071,1	0,0 / 18,5	0,0/21,4	
Architect PS	1		0,0/25,0	0,0 / 25,0	0,0/25,0	0,0/25,0	0,0/25,0	0,0725,0	0,0/25,0	0,0/25,0	0,0725,0	0,0/25,0	0,0/25,0	0,0/25,0	
Black Bet	1		0,0 / 15,0	0,0 / 15,0	0,0 / 15,0	0,0 / 15,0	0,0 / 15,0	0,0715,0	0,0 / 15,0	0,0 / 15,0	0,0715,0	0,0 / 15,0	0,0 / 15,0	0,0 / 15,0	
Business Analyst	1		18,0 / 2,0	0,0 / 20,0	0,0/20,0	0,0/20,0	0,0/20,0	0,0/20,0	0,0/20,0	0,0 / 20,0	3,0 / 17,0	5,0 / 15,0	5,0 / 15,0	2,0 / 18,0	
Champion	1		0,0 / 15,0	0,0 / 15,0	0,0 / 15,0	0,0 / 15,0	0,0 / 15,0	0,0 / 15,0	0,0 / 15,0	0,0 / 15,0	0,0715,0	0,0 / 15,0	0,0 / 15,0	0,0 / 15,0	
Configuration Librarian	1		0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	
DBA	1		1,0 / 3,3	1,0/3,3	1,0/3,3	1,0/3,3	1,0/3,3	1,0/3,3	1,0/3,3	1,0/3,3	1,0/3,3	1,0/3,3	1,0/3,3	1,0/3,3	
Deployment Champion	1		0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	0,0 / 10,0	
Developer	1		8,4 / 19,0	8,4 / 19,0	8,4 / 19,0	8,4 / 19,0	8,4 / 19,0	8,4 / 19,0	8,4 / 19,0	5,4/23,6	3,4725,6	3,4/23,7	3,4 / 11,8	3,4 / 10,4	

Resource utilization of all resources the user has permission to access

For additional information, please contact us. www.itdesign.de/addons Phone +49 7071 3667-60

View by resource

- Drill down from the resource to projects and tasks
- Changes to estimates reflected on the resource level
- Assists with identifying overutilization

Information in realtime

- Synchronous resource utilization updates
- Colored highlighting of overloads
- Role capacity