



# Multiproject Team Planning and Resource Allocation with the itd Allocation Editor

In CA Clarity PPM, the itd Allocation Editor gives an overview of all projects at a glance and quickly processes resource allocations for every project. The overarching perspective helps you avoid resource conflicts. Thanks to the color coding, you can quickly identify resource overloads.

Multiproject team planning

Resource allocation

## Overview of Resource Allocation

With the itd Allocation Editor, you can keep tabs on all your projects and their resource allocations at a glance, optionally on a weekly or monthly basis. Projects, resources and roles are depicted in a tree structure to which additional information can be added such as requested, approved or actual capacity utilization. In addition to the utilization of capacity for a given project, the overall utilization of a resource or role for all projects is cited. Thanks to the color coding, overloads of a resource or role can be identified at a glance.

## Benefits and advantages

- Presentation and processing of resource allocation
- Editing across several projects
- Color-coded feedback in real time
- Option of adding or exchanging resources directly without becoming involved with the individual project
- Display of all available time entries including current times

Name	Planned Allocation	Held Allocation	Actuals	Requestion Status	Booking Status	Role	Weeks												Sum
							10/14	10/21	10/28	11/4	11/11	11/18	11/25	12/2	12/9	12/16	12/23	12/30	
Assignment Editor and Media/DV Demo	196,818.89	536.32	0.00				Actual ETC	58.74	58.74	65.34	77.75	77.75	77.75	77.75	77.75	26.88	519.89		
							Planned Allocation	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	640.00		
							Held Allocation	1.62	1.62	1.62	1.62	1.62	1.62	1.62	1.62	1.62	8.13		
							Other Held Allocation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Develop USB stick for car keys	10,185.91	1,589.73	0.00				Actual ETC	18.60	18.60	-3.31	-58.96	-58.96	-58.96	0.00	112.73	-48.27			
							Planned Allocation	90.00	140.00	121.00	163.00	167.00	165.00	160.00	116.62	1,140.62			
							Held Allocation	48.00	71.00	20.00	42.00	67.00	56.00	60.00	60.00	381.00			
							Other Held Allocation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
Berry, Jason	1,315.61	1,391.73	0.00	Open	Used	Account Manager	Actual ETC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	58.96	58.96	117.63		
							Planned Allocation	40.00	40.00	43.00	43.00	42.00	25.00	35.00	0.00	228.00			
							Held Allocation	40.00	36.00	0.00	0.00	42.00	36.00	35.00	0.00	174.99			
							Requested	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
Cusumano, Daniel	1,943.06	196.00	0.00	New	Used	Developer	Actual ETC	0.00	0.00	40.00	40.00	-2.00	16.00	5.00	40.00	-137.21			
							Planned Allocation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
							Held Allocation	0.00	0.00	40.00	20.00	35.00	35.00	35.00	0.00	235.00			
							Requested	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
Vahedi, Heidi	2,948.96	0.00	0.00	Open	Soft	Network Engineer	Actual ETC	48.00	-1.00	29.00	-2.00	15.00	0.00	19.00	40.00	136.00			
							Planned Allocation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
							Held Allocation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			
							Requested	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00			

The Investment View shows all investments and subdivides them according to the allocated roles and resources.

- Depiction of additional information such as requested, released or actual utilization
- Color-coding of overloads

## Multi-project Processing of Resources

With the itd Allocation Editor, project managers can quickly and easily request capacity for their projects. With just a few clicks, you are able to allocate resources to a project or remove them. The utilization of a resource is entered directly in the project for the desired period as a request and confirmed. Thanks to the multi-project perspective, conflicts between resources can be avoided. The approved capacity is saved for the project, and the utilization of the respective resource is reduced over all projects.

The screenshot shows the Clarity PPM Allocation Editor interface. The main table displays resource allocation data for Jason Barry across various projects and time periods. The table includes columns for Name, Planned Allocation, Used Allocation, Actuals, Requestion Status, Booking Status, Role, and a grid of weekly allocation values from Oct 2013 to Dec 2013. A summary row at the bottom shows the total Actual ETC for Jason Barry as 43.45.

Name	Planned Allocation	Used Allocation	Actuals	Requestion Status	Booking Status	Role	10/14	10/21	10/28	11/4	11/11	11/18	11/25	12/2	Sum
Analyst	388.00	180.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jason Barry	155,519.92	1,772.91	8,488.00				43.45	43.45	41.93	35.71	35.71	35.71	94.05	97.60	425.30
itd Assignment Editor v1.4	152,544.95	63.00	0.00	New	Wired	Account Manager	26.88	42.90	23.68	18.30	44.40	0.00	37.60	29.60	389.60
Mobile Time Tracking Improvement	14.00	15.00	0.00	Open	Soft	Account Manager	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Implement Service Desk	2.00	1.00	80.00		Soft	Account Manager	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Assignment Editor and TRADAV Di	3.00	2.00	0.00	Open	Soft	Analyst	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Implement WebDAV Component	254.15	8.00	200.00		Wired	Account Manager	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Actual ETC</b>							<b>43.45</b>	<b>43.45</b>	<b>41.93</b>	<b>35.71</b>	<b>35.71</b>	<b>35.71</b>	<b>94.05</b>	<b>97.60</b>	<b>425.30</b>

The Resource View shows all the roles and resources according to their allocation to the various projects.

For additional information,  
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