



# 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	Hard Allocation	Actuals	Requestion Status	Booking Status	Role	10/14	10/21	10/28	11/4	11/11	11/18	11/25	12/2	Sum
Assignment Editor and WebDAV Demo	109,818.89	536.32	0.00				38.74	38.74	65.34	77.75	77.75	77.75	77.75	26.98	519.89
Develop USB stick for car keys	10,185.91	1,589.73	0.00				1.62	1.62	1.62	1.62	1.62	1.62	1.62	1.62	8.13
Berry, Jason	1,315.61	1,391.73	0.00	Open	Wired	Account Manager	1.62	1.62	1.62	1.62	1.62	1.62	1.62	1.62	8.13
Comenteb, Daniel	1,343.06	195.00	0.00	New	Wired	Developer	1.62	1.62	1.62	1.62	1.62	1.62	1.62	1.62	8.13
Kobert, Heidi	2,946.06	0.00	0.00	Open	Soft	Network Engineer	1.62	1.62	1.62	1.62	1.62	1.62	1.62	1.62	8.13

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

## Multiproject 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 displays the 'itd Allocation Editor' window in Clarity PPM. The interface includes a sidebar with 'Home' and 'Favorites' buttons, and a main table titled 'Allocations by Resource'. The table lists resources and their allocations across various projects and time periods. The resource 'Jason Berry' is highlighted, showing a total allocation of 155,519.92. The table columns include 'Name', 'Planned Allocation', 'Hard Allocation', 'Actuals', 'Reservation Status', 'Booking Status', 'Role', and a series of weekly columns from October 2013 to December 2013, followed by a 'Sum' column. The table contains multiple rows for different projects, including 'RD Assignment Editor v1.4', 'Mobile Time Tracking Improvement', 'Implement Service Desk', 'Assignment Editor and iVadAV Di', and 'Implement iVadAV Component'.

Name	Planned Allocation	Hard Allocation	Actuals	Reservation Status	Booking Status	Role	10/14	10/21	10/28	11/4	11/11	11/18	11/25	12/2	Sum
Analyst	388.00	100.00	0.00				Actual ETC	8.19	8.19	8.67	6.58	6.58	6.58	6.58	19.94
							Planned Allocation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							Hard Allocation	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
							Remain. Avail.	40.80	40.80	40.80	40.80	40.80	40.80	40.80	259.80
Jason Berry	155,519.92	1,772.91	8,488.00				Actual ETC	43.45	43.45	41.93	35.71	35.71	35.71	94.05	425.30
							Planned Allocation	26.88	42.88	23.88	18.00	44.88	6.00	37.88	288.88
							Hard Allocation	0.00	25.88	24.88	7.88	42.88	41.88	26.88	157.88
							Requested	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							Remain. Avail.	40.80	17.88	16.88	33.88	-2.00	-1.00	20.88	183.88
RD Assignment Editor v1.4	152,544.95	63.00	0.00	New	Wired	Account Manager	Actual ETC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							Planned Allocation	16.88	25.88	16.88	18.00	0.00	25.88	25.88	124.88
							Hard Allocation	0.00	26.88	12.88	3.88	0.00	16.88	16.88	63.88
							Requested	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							Remain. Avail.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Mobile Time Tracking Improvement	14.88	15.00	0.00	Open	Soft	Account Manager	Actual ETC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							Planned Allocation	2.88	3.88	2.88	2.88	2.88	0.00	0.00	14.88
							Hard Allocation	0.00	3.88	18.88	2.88	0.00	0.00	0.00	15.88
							Requested	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							Remain. Avail.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Implement Service Desk	2.88	1.00	80.00		Soft	Account Manager	Actual ETC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							Planned Allocation	0.00	1.00	0.00	0.00	0.00	0.00	0.00	2.88
							Hard Allocation	0.00	0.00	1.88	0.00	0.00	0.00	0.00	1.88
							Requested	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							Remain. Avail.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Assignment Editor and iVadAV Di	3.88	2.00	0.00	Open	Soft	Analyst	Actual ETC	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							Planned Allocation	0.00	0.00	1.88	0.00	0.00	0.00	0.00	1.88
							Hard Allocation	0.00	0.00	1.88	0.00	0.00	0.00	0.00	1.88
							Requested	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							Remain. Avail.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Implement iVadAV Component	254.16	0.00	200.00		Wired	Account Manager	Actual ETC	43.45	43.45	41.93	35.71	35.71	35.71	35.71	388.88

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

For additional information,  
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