itdesign

itd Allocation Editor

User and Administrator Manual v8.2.0

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March 2021

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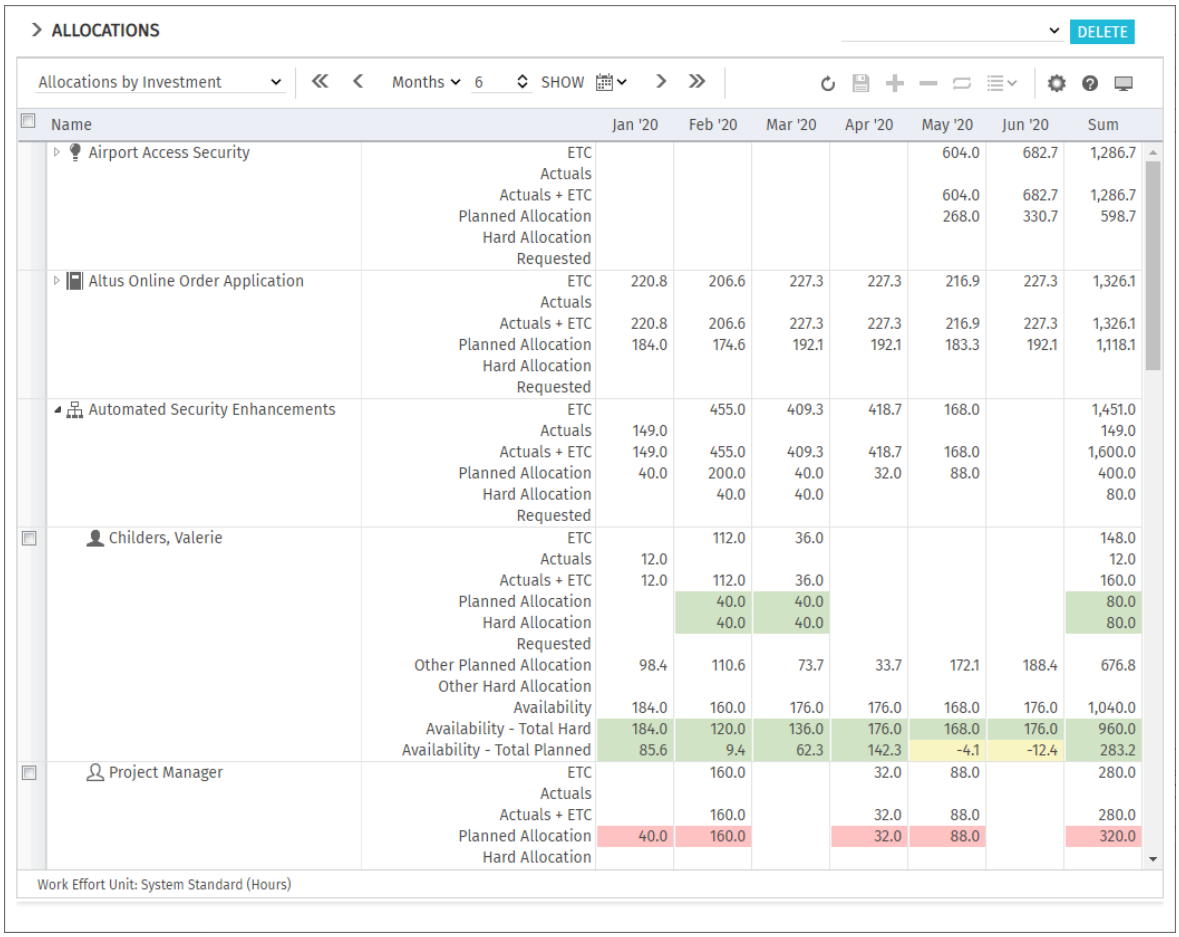
1 Short Description

The itd Allocation Editor is an add-on fully integrated with Clarity PPM for planning role, resource and team allocations across several investments.



Name		Jan '20	Feb '20	Mar '20	Apr '20	May '20	Jun '20	Sum
Airport Access Security	ETC					604.0	682.7	1,286.7
	Actuals							
	Actuals + ETC					604.0	682.7	1,286.7
	Planned Allocation					268.0	330.7	598.7
	Hard Allocation							
	Requested							
Altus Online Order Application	ETC	220.8	206.6	227.3	227.3	216.9	227.3	1,326.1
	Actuals							
	Actuals + ETC	220.8	206.6	227.3	227.3	216.9	227.3	1,326.1
	Planned Allocation	184.0	174.6	192.1	192.1	183.3	192.1	1,118.1
	Hard Allocation							
	Requested							
Automated Security Enhancements	ETC		455.0	409.3	418.7	168.0		1,451.0
	Actuals	149.0						149.0
	Actuals + ETC	149.0	455.0	409.3	418.7	168.0		1,600.0
	Planned Allocation	40.0	200.0	40.0	32.0	88.0		400.0
	Hard Allocation		40.0	40.0				80.0
	Requested							
Childers, Valerie	ETC		112.0	36.0				148.0
	Actuals	12.0						12.0
	Actuals + ETC	12.0	112.0	36.0				160.0
	Planned Allocation		40.0	40.0				80.0
	Hard Allocation		40.0	40.0				80.0
	Requested							
	Other Planned Allocation	98.4	110.6	73.7	33.7	172.1	188.4	676.8
	Other Hard Allocation							
	Availability	184.0	160.0	176.0	176.0	168.0	176.0	1,040.0
	Availability - Total Hard	184.0	120.0	136.0	176.0	168.0	176.0	960.0
	Availability - Total Planned	85.6	9.4	62.3	142.3	-4.1	-12.4	283.2
Project Manager	ETC		160.0		32.0	88.0		280.0
	Actuals							
	Actuals + ETC		160.0		32.0	88.0		280.0
	Planned Allocation	40.0	160.0		32.0	88.0		320.0
	Hard Allocation							

You enter allocation values per investment and role, resource or team. Entered efforts are summed up in their respective associated investments.

For each role, resource and team, the global total allocation from all investments is displayed. This way you can quickly spot whether a role, resource or team has been overbooked.

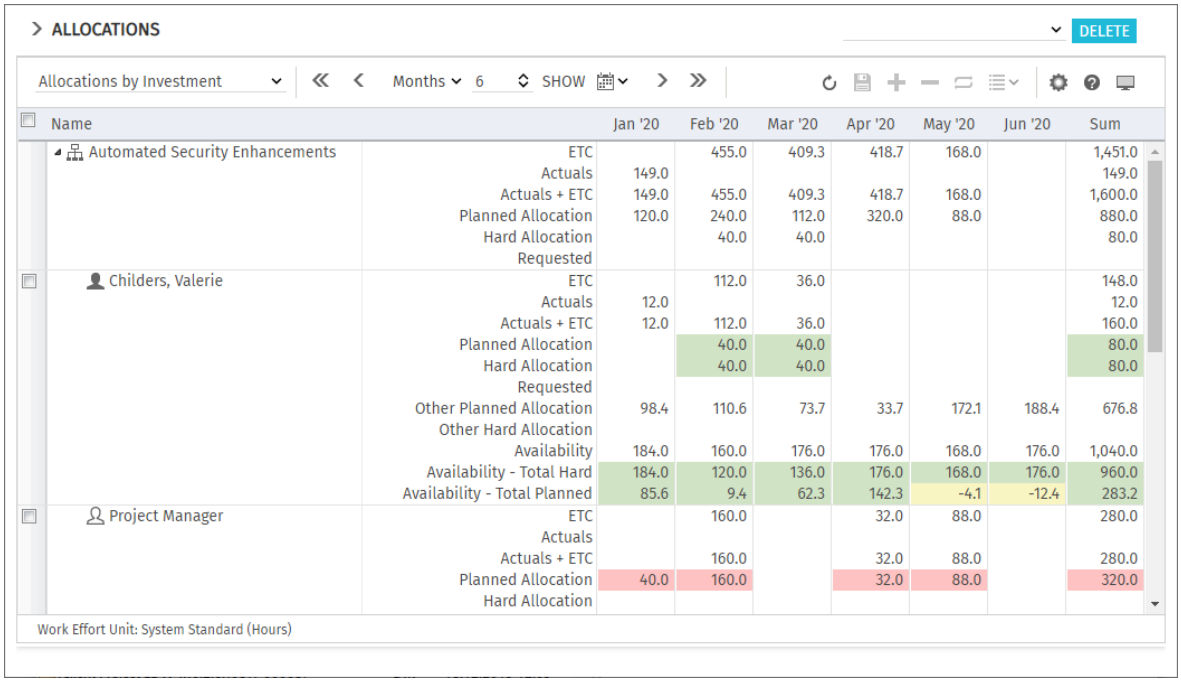
The tight integration into Clarity PPM allows for a better workflow on team entries while respecting Clarity PPM's own security permissions for viewing and editing allocations.

Feature Overview

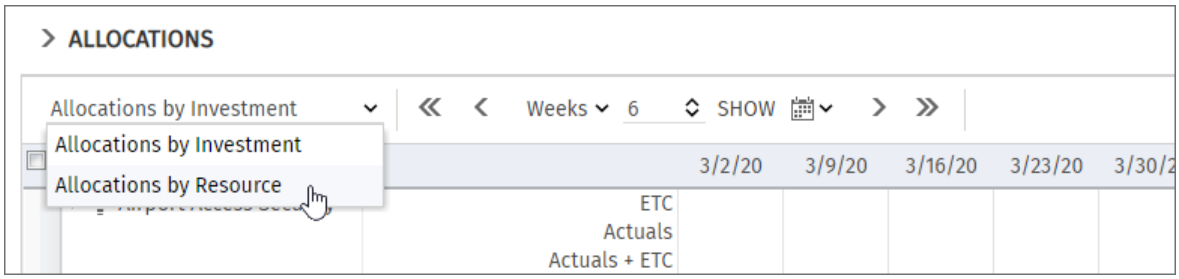
- Plan allocations across several investments
- Global overview of allocations and remaining availability of roles, resources and teams
- Quick selection of investments, roles, resources and teams with filters for Clarity PPM standard fields and custom fields of investments, investment sub-types, roles, resources and teams as well as team entries
- Tight integration with Clarity PPM through lookups, actions and security permissions

2 Hierarchy View Modes

The itd Allocation Editor displays allocations by investment and then by role, resource or team or by role, resource or team and then by investment, depending on the selected hierarchy view mode.



In the top left corner of the data grid you can select the hierarchy view mode for the application:



- **Allocations by Investment:** in this view mode, investments are shown on the first level. When expanding an investment node, all team entries are listed together with their allocation values.
- **Allocations by Resource:** in this view mode, the view on the data is reversed, meaning that any selected roles, resources and teams are listed on the top level. When expanding a role, resource or team node in the tree grid, you will see all the investments to which that role, resource or team is assigned.

3 Filter

This chapter describes the filter settings for the itd Allocation Editor.

3.1 Displayed Data

Depending on your view mode, the following data will be loaded and displayed without a filter:

- **Allocations by Investment** mode
  - Any investments to which you have access, with all of their parent/sub-investments (custom investment types included)
  - Roles, resources and teams with team entries for displayed investments
  - Associated team entries and allocations
- **Allocations by Resource** mode
  - Any roles, resources and teams with team entries for investments to which you have access (Default setting. Optionally, all roles, resources and teams you have access to will be displayed instead, with no investment rights required, see "6.12.4 Configure Allocations by Resource View Rights" on page 40).
  - Investments with team entries of displayed roles, resources and teams (custom investment types included)
  - Associated team entries and allocations
  - Team allocations of resources (allocated percentage of resource availability)

3.2 Access Rights and Query Limits

The amount of data that will actually be loaded is limited by your access rights and by the query limits entered for the itd Allocation Editor in the `pl_itd_ae.properties` file on the server:

- **Access Rights:** data records to which you have no access in Clarity PPM will not be displayed in the itd Allocation Editor application either.
- **Query Limits:** limits for the number of roles/resources/teams and investments to load at the same time, entered by a system administrator in the `pl_itd_ae.properties` file on the server (see "6.13.1 Query Limits" on page 42).

  If data records aren't displayed due to query limits, this will be indicated.

3.3 Selecting Filter Fields

Which fields are available in what order is defined per user and view mode in the **Filter** tab of the **Preferences** dialog (see “5.3 Filter” on page 23).

You may open the selection of available filter fields directly by clicking the **Configure** button on the filter panel.

By default, the filter fields listed in section "3.6 Default Filter Fields" on page 9 will be available.

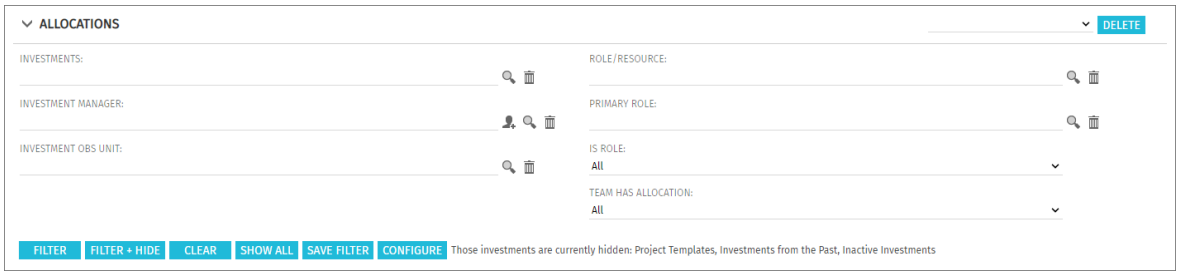
Members of the **ARP Admin** group may add other fields available for investments, investment sub-types, roles/resources/teams and team entries to the selection of filter fields (see "6.11 Configuring List and Filter Fields" on page 35).

Most Clarity PPM standard fields may be added, as well as most custom fields defined for these objects.

3.4 Entering Filter Conditions

Enter filter settings to filter the displayed investments, roles/resources/teams and/or team entries.

You can display or hide the filter area via the little arrow button in the upper left corner of the view.



Use the buttons at the lower left of the filter panel to apply, reset or save your filter and to configure filter fields.

- Click **Filter** to load the data set matching the filter conditions.
- Click **Filter + Hide** to apply and hide the filter settings, expanding the allocation matrix.
- Click **Clear** to delete all filter conditions. Clicking **Filter** immediately afterwards will reload all data.
- Click **Show all** to clear all filter values and reload all data.
- Click **Save Filter** to preserve your current filter settings for future use. This includes filter fields and values. Name your filter and set it as default filter, if desired.
- Click **Configure** to change the selection of available filter fields.

Once you have saved your set of filter settings, you can always select it in the menu in the top right corner of the filter settings. Here, you may also **Delete** the selected filter.

3.5 Clarity PPM Lookups

Some filter fields are backed by a Clarity PPM lookup.

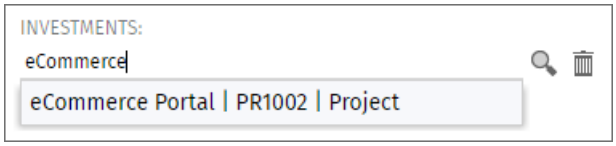
Click the add user icon to enter your user name in a field. This icon is only available for fields that support entering a Clarity PPM user.

Click the magnifier icon to access the lookup browse window for a field and select values.

Click on the trashcan icon to empty a field. If you only want to delete some items, click on the field first, select the items to remove and then click on the trashcan icon.

All lookup filters are multi-valued and will display a second empty list box when selected. This is where selected values go. Investments or roles/resources matching any selected value will be displayed.

As with all Clarity PPM lookups, a list of suggested values are displayed when typing in the text box.



Select a suggestion by clicking on it or via the arrow keys and [RETURN].

3.6 Default Filter Fields

The following sections list and describe the filter fields available by default for investments, roles, resources and teams as well as team entries in the itd Allocation Editor.

3.6.1 Default Filter Fields for Investments

The following investment filter fields are available by default. Only investments matching all entered filter properties, and, if applicable, associated hierarchies will be displayed.

Sub-Types: You may also filter investments by fields of investment sub-types. If you do, only investments of that sub-type which match the filter will be displayed.

Hierarchies: If applicable, investment hierachies will also be displayed in **Allocations by Investment** mode (see "3.6.2 Selecting Investment Hierarchies in Allocations by Investment Mode" on page 10).

- **Investment – Investments:** select one or more investments to display.

  This is a multi-valued lookup filter. If you make a selection here, only selected investments and, if applicable, associated investment hierachies will be displayed.

  The lookup browse window lets you filter the selection of available investments by name, investment ID, investment type and status ("active?").

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.
- **Investment – Investment Name:** enter a search term which occurs in the investment name. Use the asterisk character "*" as a placeholder for an arbitrary number of characters. Search terms will be treated as if ending with "*". (e.g., "*CRM" will find investment names containing "CRM" , while "CRM", without the asterisk, will find only investment names starting with "CRM").
- **Investment – Investment ID:** enter a search term which occurs in the investment id. Use the asterisk ("*") as a placeholder for an arbitrary number of characters. Search terms will be treated as if ending with "*".(e.g., "*007" will find any investment whose id contains "007", while "007", without the asterisk, will find only investments whose ids begin with "007").
- **Investment – Hide Investments from the Past:** when this filter field is displayed, select this to hide investments ending before the start of the previous month.

  When the filter field isn't displayed, investments from the past won't be displayed (as when the filtering option is displayed and selected). This will be indicated by a note in the filter panel.
- **Investment – Inactive Investments:** determine whether to display inactive investments (that have been deactivated via **Properties - Settings – General – Active**).

  When this filter field isn't displayed, inactive investments won't be displayed (as when **Hide** is selected). This will be indicated by a note in the filter panel.

  When the filter field is displayed, select one of the following options:
  - With the default setting **Show**, inactive investments will be displayed.
  - Select **Hide** if you don't wish to display inactive investments.
  - Select **Show if relevant** to display inactive investments only if they have team entries that are partly or completely in the selected time period.
- **Investment – Investment Type:** filter investments by type (Application, Asset, Idea, Other Work, Product, Project or Service). This is a multi-valued lookup filter. If you make a selection here, only investments of selected types will be displayed. Please note that custom investment types aren't supported here and associated investments will never be displayed with this filter.

  The lookup browse window lets you filter the selection of investment types.

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.

- **Investment – Investment Status:** filter investments by status. This is a multi-valued lookup filter. If you make a selection here, only investments with selected status values will be displayed.

  The lookup browse window lets you filter the selection of investment status values.

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.
- **Investment – Investment Manager:** filter investments by manager.

  This is a multi-valued lookup filter. If you make a selection here, only investments of selected managers will be displayed.

  Click the add user icon to enter yourself in the field.

  The lookup browse window lets you filter the selection of available investment managers by last name, first name, user name, resource ID, type and status.

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.
- **Investment – Investment OBS Unit:** filter investments by OBS unit.

  This is a multi-valued lookup filter. If you make a selection here, only investments belonging to a selected OBS unit or to a sub unit of a selected OBS unit will be displayed.

  The lookup browse window lets you select the desired OBS top level, sub levels and units.

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.
- **Project – Project Templates:** determine whether to display project templates (for which **Properties - Settings – General – Template** has been selected).

  When this filter field isn't displayed, project templates won't be displayed (as when **Hide Project Templates** is selected). This will be indicated by a note in the filter panel.

  When the filter field is displayed, select one of the following options:
  - With the default setting **Show all**, any investments, including project templates, will be displayed.
  - Select **Hide Project Templates** to display only investments that are not project templates.
  - Select **Show only Project Templates** to display only project templates and no other investments.

3.6.2 Selecting Investment Hierarchies in Allocations by Investment Mode

With investment hierarchies displayed, in **Allocations by Investment** mode, using the **Investments**, **Investment Name** and **Investment ID** fields without any other investment filter fields will also select associated hierarchies.

In this case, all of the following investments will be loaded and displayed:

- Investments explicitly selected via a filter
- Any parent investments of explicitly selected investments
- Any sub-investments of displayed investments

Notes: You can turn off displaying of investment hierarchies completely via the **Preferences** (see "5.1 General" on page 21). If you do, only explicitly selected investments without any parent or sub-items they may have will be displayed.

With **Show Investment Hierarchy**, in the **Allocations by Investment** mode, parent hierarchies of investments that have been explicitly selected via a filter will always be displayed.

When using no investment filters except for **Investments**, **Investment Name** and **Investment ID**, sub-investments of selected investments and of displayed parent investments will also be displayed.

3.6.3 Default Filter Fields for Roles, Resources and Teams

The following role, resource and team filter fields are available by default.

Only roles, resources and teams matching all entered filter properties will be displayed.

If you combine a resource filter with an investment filter, only selected roles, resources and teams will be displayed together with any selected investments to which they're allocated. If none of the selected roles, resources or teams are allocated to any selected investment, nothing will be displayed.

- **Resource – Role/Resource:** select one or more roles, resources and/or teams to display.

  This is a multi-valued lookup filter. If you make a selection here, only selected roles, resources and teams will be displayed.

  The lookup browse window lets you filter the selection of available available roles, resources and teams by last name, first name and resource ID

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.
- **Resource – Is Role:** filter roles, resources and teams by type, role or resource/team.

  With the default setting **All**, roles, resources and teams will not be filtered by resource type.

  Select **Yes** to only display roles. With this setting, investments with only resource and/or team allocations will not be displayed.

  Select **No** to only display resources and teams. With this setting, investments with only role allocations will not be displayed.
- **Resource – Primary Role:** filter roles and resources by role, primary role and/or parent role.

  Teams have no primary role and will therefore not be displayed with this filter.

  If you make a selection here, only selected roles and resources will be displayed:
  - **Role:** all selected roles.
  - **Role Parent Role:** all roles having any of the selected roles as their parent roles.
  - **Resource Primary Role:** all resources having any of the selected roles as their primary roles.

  The lookup browse window lets you filter the selection of available roles by role name.

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.
- **Resource – Resource Name:** enter a search term which occurs in the role, resource or team name. Use the asterisk ("*") as a placeholder for an arbitrary number of characters (e.g., "*son" will find both "Harrison" and "Jackson").

  Search terms will be treated as if ending with "*" (e.g. “Jack” will also find “Jackson”).
- **Resource – Booking Manager:** filter roles and resources by booking manager.

  Teams have no booking manager and will therefore not be displayed with this filter.

  This is a multi-valued lookup filter. If you make a selection here, only roles and resources of selected booking managers will be displayed. Teams won’t be displayed with this filter.

  Click the add user icon to enter yourself in the field.

  The lookup browse window lets you filter the selection of available booking managers by last name, first name and resource ID.

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.
- **Resource – Resource Manager:** filter resources and teams by resource manager.

  Roles have no resource manager and will therefore not be displayed with this filter.

  This is a multi-valued lookup filter. If you make a selection here, only resources of selected resource managers will be displayed.

Click the add user icon to enter yourself in the field.

The lookup browse window lets you filter the selection of available resource managers by last name, first name, full name, resource ID and employment type.

Click the trashcan icon to remove selected values or to clear the field, if no value is selected.

- **Resource – Resource OBS Unit:** filter roles, resources and teams by OBS unit.

  This is a multi-valued lookup filter. If you make a selection here, only roles, resources and teams belonging to any selected OBS unit or to a sub unit of a selected OBS unit will be displayed.

  The lookup browse window lets you select the desired OBS top level, sub levels and units.

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.
- **Resource – Is External:** filter resources by their **External** property (selected via **Properties – General – Resource Management – External**).

  With the default setting **All**, all roles, resources and teams will be displayed.

  Select **Yes** to display only external resources. With this setting, roles and teams won't be displayed.

  Select **No** to display only roles, internal resources and teams.
- **Resource – Skills:** filter roles, resources and teams by skills.

  By default, allocations will be displayed for all roles, resources and teams with at least one selected skill.

  Alternatively, you can set the filter to require all skills to match via the **Skill Matching** field.
- **Resource – Skill Matching:** here, you determine the mode for the skill filter, **Match at least one skill** or **Match all skills**.

  Without this filter field, the **Match at least one skill** mode will be used, such that roles, resources and teams with any selected skill will be displayed.

3.6.4 Default Filter Fields for Team Entries

The following team entry filter fields are available by default.

These filters will be combined with any investment and/or role/resource filters. Only allocations matching all entered filter properties will be displayed.

- **Team – Booking Status:** filter team entries by booking status.

  This is a multi-valued lookup filter. If you make a selection here, only team entries with a selected booking status will be displayed.

  The lookup browse window lets you filter the selection by booking status name.

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.
- **Team – Request Status:** filter team entries by request status.

  This is a multi-valued lookup filter. If you make a selection here, only team entries with a selected request status will be displayed.

  The lookup browse window lets you filter the selection by request status name.

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.
- **Team – Staff OBS Unit:** filter team entries by staff OBS unit.

  This is a multi-valued lookup filter. If you make a selection here, only team entries belonging to any selected OBS unit or to a sub unit of a selected OBS unit will be displayed.

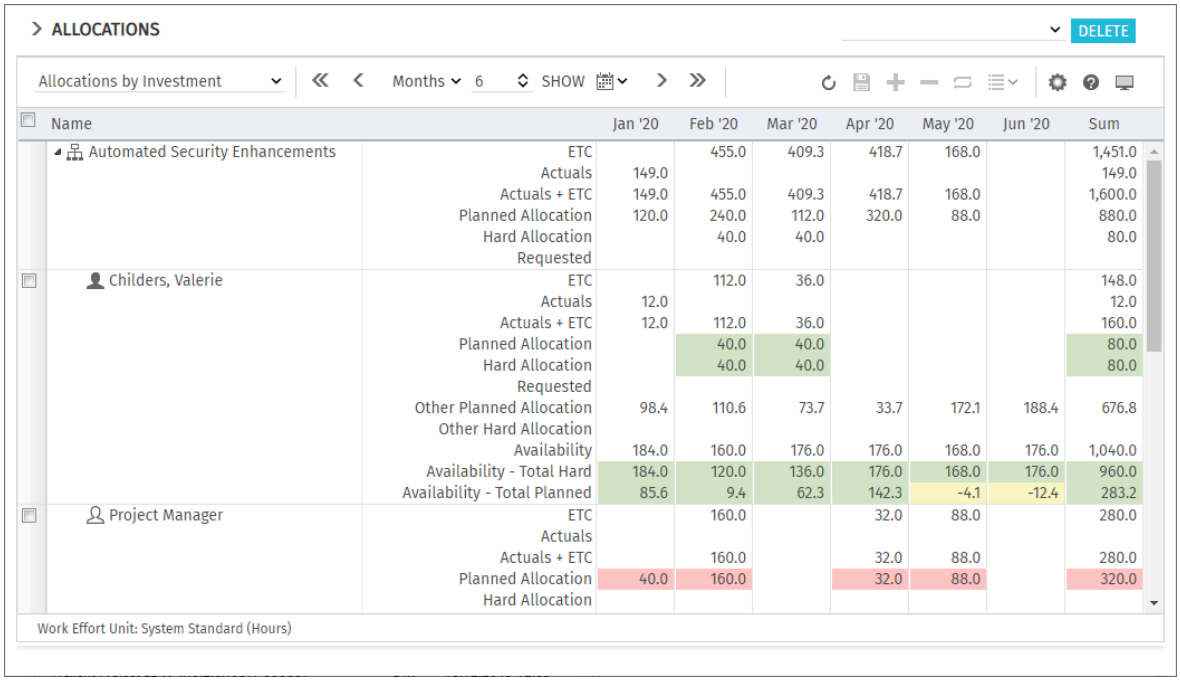
  The lookup browse window lets you select the desired OBS top level, sub levels and units.

  Click the trashcan icon to remove selected values or to clear the field, if no value is selected.

- **Team – Team Has Allocation:** display only team entries with planned and/or hard allocation in the selected time period:
  - **All:** don't filter.
  - **Team Has Planned Allocation:** only display team entries that have planned allocation.
  - **Team Has Hard Allocation:** only display team entries that have hard allocation.
  - **Team Has Both Planned AND Hard Allocation:** only display team entries that have both planned allocation and hard allocation.
  - **Team Has Planned OR Hard Allocation:** only display team entries that have either planned allocation or hard allocation.

4 Allocations by Investment or Resource

Several items are displayed: all investments selected via filters as well as associated team entries of selected roles, resources and teams that are allocated to selected investments.



Name		Jan '20	Feb '20	Mar '20	Apr '20	May '20	Jun '20	Sum
Automated Security Enhancements	ETC		455.0	409.3	418.7	168.0		1,451.0
	Actuals	149.0						149.0
	Actuals + ETC	149.0	455.0	409.3	418.7	168.0		1,600.0
	Planned Allocation	120.0	240.0	112.0	320.0	88.0		880.0
	Hard Allocation		40.0	40.0				80.0
	Requested							
Childers, Valerie	ETC		112.0	36.0				148.0
	Actuals	12.0						12.0
	Actuals + ETC	12.0	112.0	36.0				160.0
	Planned Allocation		40.0	40.0				80.0
	Hard Allocation		40.0	40.0				80.0
	Requested							
	Other Planned Allocation	98.4	110.6	73.7	33.7	172.1	188.4	676.8
	Other Hard Allocation							
	Availability	184.0	160.0	176.0	176.0	168.0	176.0	1,040.0
	Availability - Total Hard	184.0	120.0	136.0	176.0	168.0	176.0	960.0
	Availability - Total Planned	85.6	9.4	62.3	142.3	-4.1	-12.4	283.2
Project Manager	ETC		160.0		32.0	88.0		280.0
	Actuals							
	Actuals + ETC		160.0		32.0	88.0		280.0
	Planned Allocation	40.0	160.0		32.0	88.0		320.0
	Hard Allocation							

4.1 Opening Object Properties

In **Allocations by Investment** mode, click the name of an investment to open the associated Clarity PPM detail view. Click the name of a role, resource or team displayed below an investment to open the Clarity PPM detail view of the associated team entry. Via the **Resource/Role** link at the top right in the team entry, you open the resource's detail view.

In **Allocations by Resource** mode, click the name of a role, resource or team to open the associated Clarity PPM detail view.

The respective Clarity PPM detail view will be opened in a new browser tab.

4.2 Investment Role and Resource Role

The **Investment Role** column is available in both view modes. On the team entry level (role/resource in **Allocations by Investment** mode or investment in **Allocations by Resource** mode), it displays the team entry's investment role, i.e., the role's resource's or team's effective role in the associated investment.

Click the **Investment Role** column in a team entry's row to change or remove the investment role. Then, click the magnifier icon to select a role or the trashcan icon to clear the field.

In **Allocations by Resource** mode, the **Investment Role** column in a role's or resource's row displays that role's parent role or that resource's primary role.

In **Allocations by Investment** mode, the parent roles of roles and the primary roles of resources are displayed in the **Resource Role** column.

Changing a role's parent role or a resource's primary role isn't possible in the itd Allocation Editor.

However, you can change these assignments in the role's or resource's detail view, which you can open by clicking the role's or resource's name in the **Name** column.

4.3 Booking Status and Request Status

The **Booking Status** and **Request Status** columns in the row of a team entry display the respective status of that team entry. The booking status can't be changed in the itd Allocation Editor. You can change the request status by clicking in the associated column.

4.4 Editing Additional Fields

Most additional fields displayed in the list may be made editable by members of the **ARP Admin** group (see "6.11 Configuring List and Filter Fields" on page 35).

This is supported for most Clarity PPM standard fields and any custom fields displayed in the list except for fields of the **Calculated**, **Formula** and **URL** types.

To edit a field, select it in the list, then enter or select the desired value. For single-valued lookups, click the magnifier icon to enter a value. Click the trashcan icon to clear the field. For multi-valued lookups, click the magnifier icon to enter values. Select a value and click the trashcan icon to remove that value.

4.5 Aggregated Values

The **Planned Allocation** column displays the overall allocation for a row. If the row has sub-elements, the aggregated value is shown.

Therefore, in the **Allocations by Resource** mode, each role, resource or team row shows the allocation of that role, resource or team over all investments.

In **Allocations by Investment** mode, each investment row displays the sum of allocations for all roles, resources and teams booked on that investment.

Similarly, the **Hard Allocation** and **Actuals** column show the value / aggregated sum of the hard allocation and actuals of the involved team entries.

In the **Allocations by Resource** view, team associations of resources are displayed in a separate sub-row as allocations. The amount of allocation is controlled via the team settings (up to 100% of the resource's total capacity).

4.6 Allocation per Period

On the right hand side of the table you can see and edit the allocation per period.

Use the controls of the lower toolbar to configure the view's scale, period and start date (see "4.7.4 Timeslices (Scale, Period and Start Date)" on page 20).

For each period slice, a lot of details about the allocation of that team entry are shown:

☑	Childers, Valerie	ETC		112.0	36.0				148.0
		Actuals	12.0						12.0
		Actuals + ETC	12.0	112.0	36.0				160.0
		Planned Allocation		60.0	120.0				180.0
		Hard Allocation		60.0	120.0				140.0
		Requested							
		Other Planned Allocation	98.4	110.6	73.7	33.7	172.1	188.4	676.8
		Other Hard Allocation							
		Availability	184.0	160.0	176.0	176.0	168.0	176.0	1,040.0
		Availability - Total Hard	184.0	100.0	56.0	176.0	168.0	176.0	900.0
		Availability - Total Planned	85.6	-10.6	-17.7	142.3	-4.1	-12.4	183.2

Please note that not all of these aggregated values are always displayed.

You may select the values to display on the investment or resource level (depending on the selected view mode) and on the team level in the **Timeslice Details** tab of the preferences (see „5.6 Timeslice Details" on page 26).

Please also note that these settings are stored separately for each of the two view modes and that they may differ depending on the selected view mode.

- **ETC, Actuals, Actuals + ETC:** the first three columns display the ETC values for future periods, the Actuals for past periods and the sum of both, which will be equal to one of the other two for all but the current period.
- **Planned Allocation:** the amount of time this role, resource or team is tentatively scheduled to work on this investment. Cell colors display low (white), optimal (green), high (yellow) or very high (red) utilization in the associated period (see "5.5 Utilization" on page 25).
- **Hard Allocation:** the amount of time this role, resource or team is **committed** to work on this investment. Cell colors display low (white), optimal (green), high (yellow) or very high (red) utilization (see "5.5 Utilization" on page 25).
- **Requested:** the amount of time this role, resource or team is **requested** for this investment.
- **Other Planned Allocation:** the amount of time this role, resource or team is **tentatively scheduled** to work on other investments.
- **Other Hard Allocation:** the amount of time this role, resource or team is **committed** to work on other investments.
- **Availability:** the total amount of time this role, resource or team is available each period. The availability of a role is calculated by summing up the total availability of all resources which have that role as their primary role. The availability of a team is summed up over the allocation of its members to the team, assigned as a percentage of their total availability.
- **Availability – Total Planned:** the amount of time this role, resource or team is still available after subtracting her planned allocation.
- **Availability – Total Hard:** the amount of time this role, resource or team is still available after subtracting her hard allocation.

Click the table cells to edit the displayed values.

Childers, Valerie	ETC		112.0	36.0				148.0
	Actuals	12.0						12.0
	Actuals + ETC	12.0	112.0	36.0				160.0
	Planned Allocation		60.0	120.0				180.0
	Hard Allocation		60.0	120.0				180.0
	Requested							
	Other Planned Allocation	98.4	110.6	73.7	33.7	172.1	188.4	676.8
	Other Hard Allocation			40.0				
	Availability	184.0	160.0	176.0	176.0	168.0	176.0	1,040.0
	Availability - Total Hard	184.0	100.0	16.0	176.0	168.0	176.0	860.0
	Availability - Total Planned	85.6	-10.6	-17.7	142.3	-4.1	-12.4	183.2

Any changes you make in this view are preliminary. Fields changed in the current session will be marked by a red triangle in the top left corner, as displayed in the screenshot for the second planning period. They will only be written back to the database when you save your changes.

In this fashion you can edit the following values:

- Planned Allocation
- Hard Allocation

You may extend an investment's duration by entering values in periods outside its original duration.

When you do, the background of the editing cell becomes yellow, indicating that the investment's duration will be increased to include the period you are editing once you confirm your entries by clicking the **Save** button in the toolbar:

4.7 Toolbar Features

The following features are available in the view's toolbar. See below for more detailed descriptions of the Clarity PPM operations available directly in the toolbar and in the **Actions** menu.

- Hierarchy View Mode (**Allocations by Investment** or **Allocations by Resource**; see "2 Hierarchy View Modes" on page 6).
- Clarity PPM Operations in the Toolbar (see page 18 for details)
  - Add Resource(/Role/Team) or Investment (depending on view mode)
  - Remove team entry for the selected Resource or Investment (depending on view mode)
  - Replace Allocation (change role/resource of selected allocation, **Allocations by Investment** mode only)
- Clarity PPM Operations in the **Actions** Menu (see page 19 for details)
  - Create Requisition
  - Allocate From Estimates
  - Commit Planned Allocation (to hard allocation)
  - Accept Hard Allocation (as planned allocation)
  - Shift Allocation
  - Set Allocation
- View Operations (see page 19 for details)
  - Refresh
  - Save
  - Preferences
  - Toggle Full Screen
  - About
- Timeslices (Scale, Period and Start Date – see page 20 for details)
  - Previous or Next Interval or Intervals (arrow buttons)
  - Timeslice Period (scale)
  - Number of Timeslices (**Show** to apply)
  - Jump to Date (calendar sheet button)

4.7.1 Clarity PPM Operations in the Toolbar

The itd Allocation Editor seamlessly supports all major Clarity PPM operations for team members. They behave exactly like the actions that are available at Clarity PPM's team member view.

The following Clarity PPM operations are available directly in the toolbar:

- **Add Resource/Investment:** depending on the selected hierarchy view mode, you can add new sub-elements to the top level element:
  - In **Allocations by Investment** mode, select an investment and click **Add Resource** to add one or more roles, resources and/or teams to the investment.

    Please note that this feature is not currently supported for custom investment types.
  - In **Allocations by Resource** mode, select a role, resource or team and click **Add Investment** to add the role, resource or team to one or more investments.

  You may add any role to the same investment more than once to create multiple allocation entries for that role in the investment. If you do, additional role entries will be numbered in the **Name** column. Each instance of the role in the investment may later be replaced with a different resource.
- **Remove Resource/Investment:** depending on the selected hierarchy view mode, you can remove sub-elements from a top level element:
  - In **Allocations by Investment** mode, select one or more roles, resources and/or teams and click **Remove Resource** to remove the selected entries from the associated investment.
  - In **Allocations by Resource** mode, select one or more investments and click **Remove Investment** to remove the associated role, resource or team from all selected investments.

  Any allocation already entered for a role, resource or team in an investment will be discarded when that role, resource or team is removed from the investment.
- **Replace Allocation:** this option is only available in the **Allocations by Investment** mode.

  It is also currently not supported for custom investment types.

  Select a role, resource or team and click **Replace Allocation** to select one or more roles, resources and/or teams to distribute the allocation to.

  The allocation will be distributed with regard to the availabilities of the selected roles, resources and/or teams.

  If the original allocation of the role, resource or team to replace in the investment exceeds the total availability of the roles, resources and/or teams you have selected for replacement, the remaining allocation will stay with the replaced role, resource or team. If the allocation could be completely replaced, the replaced role, resource or team will be removed from the investment.

4.7.2 Clarity PPM Operations in the Actions Menu

The following Clarity PPM operations are accessible by default in the toolbar's **Actions** menu.

Members of the **ARP Admin** group can customize the **Actions** menu by hiding default actions and adding additional custom actions (see "6.10 Defining Actions" on page 33).

- **Create Requisition:** create a new requisition for the selected team entry.
- **Allocate From Estimates:** calculate the planned allocation based on the ETC estimations for the selected team entries.
- **Commit Planned Allocation:** reset the hard allocation to be equal to the planned allocation for the selected team entries.
- **Accept Hard Allocation:** reset the planned allocation to be equal to the hard allocation for the selected team entries.
- **Shift Allocation:** shift the allocations of the selected team entry. You will be prompted for the start and end date of the allocations to shift as well as a target date the allocations should be shifted to.

  You may reduce or increase the allocation with a shift by entering a cut-off date for the target period or via scaling.

  - **Cut-Off Date:** by default, any allocation segments in the period selected via start and end date will be shifted to the period of the same length starting with the specified target date. The end date of the target period results from its start date and the duration of the selected source period.

    You may reduce the target period by entering a cut-off date before the original end date of the target period. If you do, allocations will only be shifted for the period defined by the duration of the target period, from start to cut-off date. All remaining allocations will then be discarded.
  - **Scale:** enter a percentage greater than 0% to increase the allocation by the given rate with the shift.
- **Set Allocation:** open Clarity PPM's allocation editor to directly enter the allocation as percentages of the associated role's, resource's or team's FTE in given periods.

4.7.3 View Operations

The remaining toolbar buttons serve to update the view, save entries made, customize the view and get release information about itd Allocation Editor.

- **Refresh:** reload the data grid with the currently selected filter.
- **Save:** apply any unsaved changes made in the view. Unsaved changes can be identified via the red triangle in the corner of a field.
- **Preferences:** edit view options (see "5 User Preferences" on page 21).
- **Toggle Full Screen:** hide or display the Clarity PPM navigation bar at the top of the screen. In full screen mode, the navigation bar will be hidden, such that more items can be displayed in the itd Allocation Editor.
- **About:** display information about the installed version of the itd Allocation Editor.

4.7.4 Timeslices (Scale, Period and Start Date)

Use the buttons and menus in the lower toolbar above the allocation grid to the right to change the scale, size and start date of the grid.

These settings are directly interconnected with the **Timeslices** tab of the **Preferences** dialog.

All options available there are also available in the toolbar, except for fiscal periods as slice periods (see „5.4 Timeslices" on page 24).

The selection of available slice periods may be limited by Clarity PPM application administrators via the **itd AE Preferences** lookup (see "6.12.3 Restrict Time Slice Periods in the Preferences and in the Toolbar" on page 40). In this case, only the options enabled via the associated lookup value will be available here and in the **Timeslices** tab of the **Preferences**.

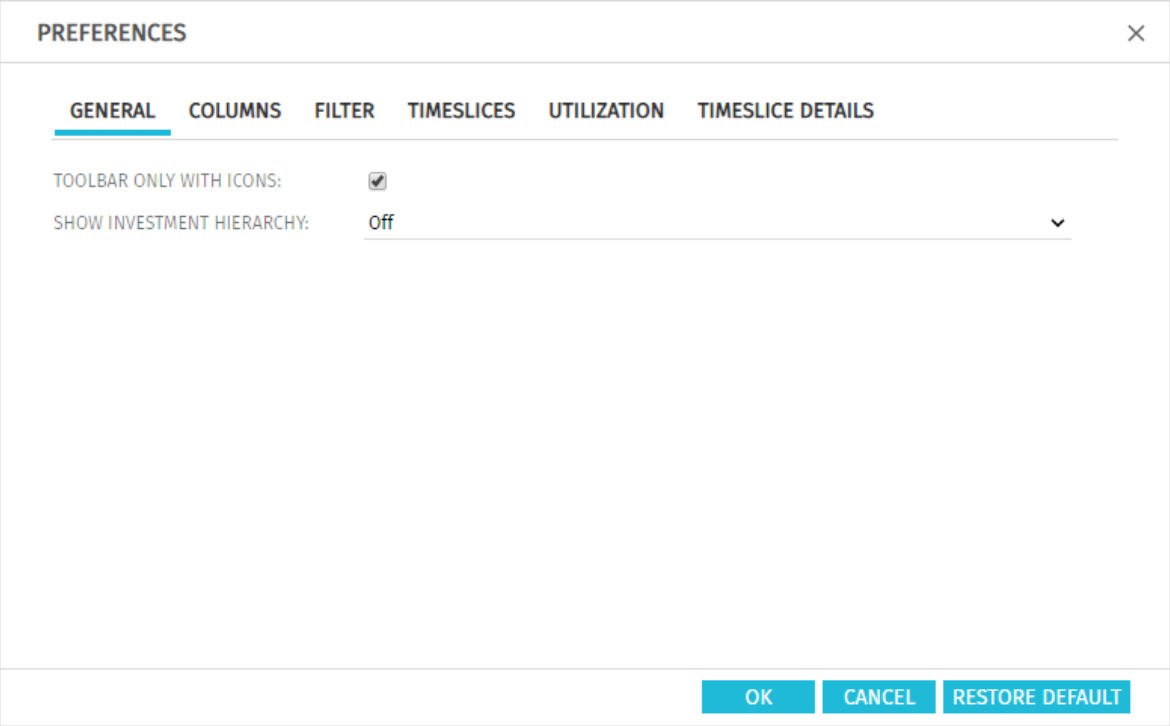
- **Previous or Next Period or Periods:** use the arrow buttons to change the view's start date.

  The double arrows will shift the start date for the selected number of periods.
  The single arrows will shift the start date for one period.
- **Slice Period:** select the desired period here. Available options are **Days**, **Weeks**, **Months**, **Quarters** and **Calendar Years**.
- **Number of Periods:** select or enter the desired number of periods in the box next to the slice period menu. This setting will not be applied directly. Click **Show** to apply it.
- **Jump to Date:** click the calendar sheet button to select a start date.

5 User Preferences

Click the **Preferences** button in the toolbar to edit view options.

5.1 General

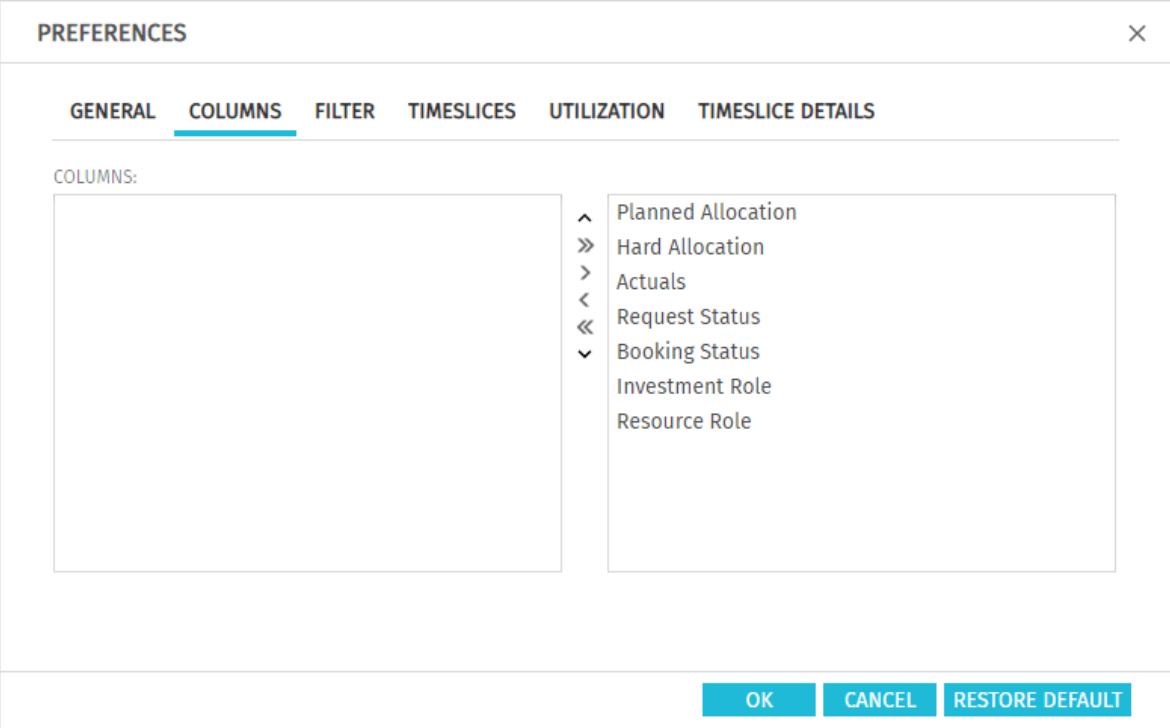


- **Toolbar Only with Icons:** select this to hide captions on buttons with icons.
- **Show Investment Hierarchy (Allocations by Investment only):** here, you show or hide investment hierarchies in **Allocations by Investment** mode. This includes any parent and sub-investments of investments explicitly selected via filter conditions.

  Hiding investment hierarchies may speed up loading the view.

  Please note that displaying of hierarchies also depends on which filters you use (see "3.6.2 Selecting Investment Hierarchies in Allocations by Investment Mode" on page 10).

5.2 Columns



- **Columns:** the list always displays the **Name** of each investment, role, resource and team.

  By default, you may also display any of the following team entry and role/resource/team fields
  - **Team Entry (working hours):** Planned Allocation, Hard Allocation, Actuals
  - **Team Entry (other):** Request Status (editable), Booking Status, Investment Role (editable)
  - **Role/Resource:** Resource Role (role's parent role or resource's primary role; only available in **Allocations by Investment** mode. In **Allocations by Resource** mode, the **Investment Role** column displays a role's parent role or a resource's primary role.)

  In addition to these fields, members of the **ARP Admin** group may add other fields available for investments, investment sub-types, roles/resources/teams and team entries to the selection (see "6.11 Configuring List and Filter Fields" on page 35). Most Clarity PPM standard fields may be added, as well as most custom fields defined for these objects.

  Most fields displayed in the list may be made editable by members of the **ARP Admin** group (see "6.11 Configuring List and Filter Fields" on page 35). This is supported for most Clarity PPM standard fields and any custom fields displayed in the list except for fields of the **Calculated**, **Formula** and **URL** types.

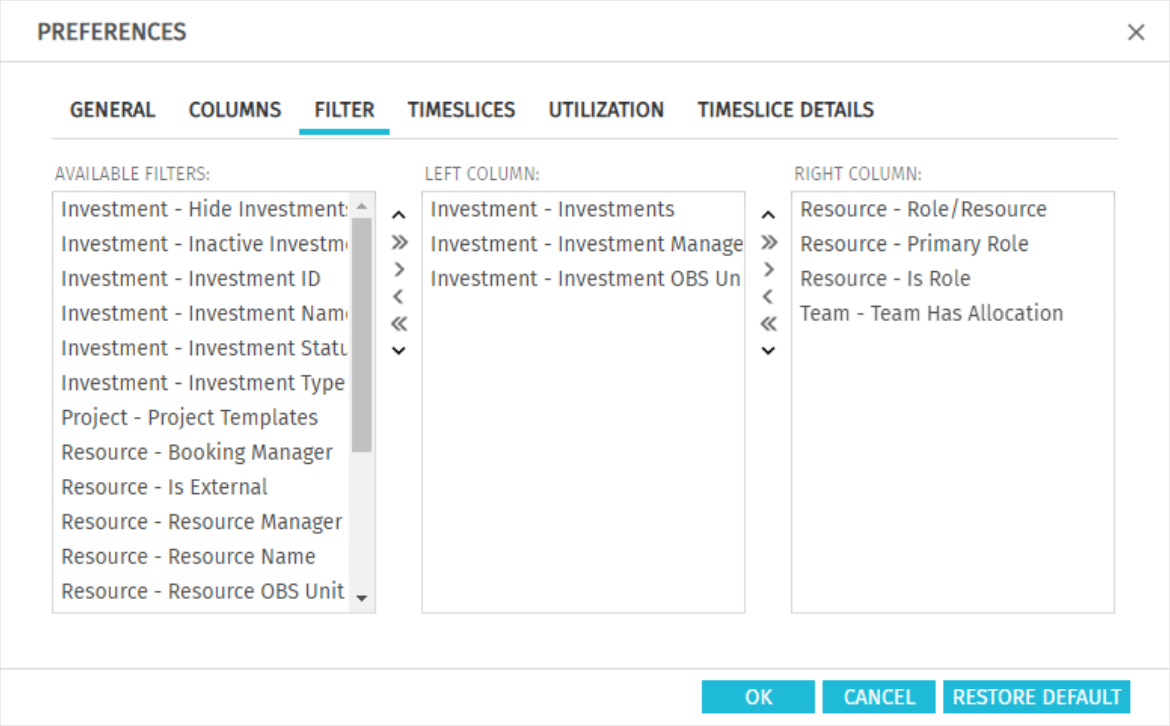
5.3 Filter

You may filter the investments, roles/resources and team entries to display.

See section “3.6 Default Filter Fields” on page 9 for details about filter fields supported by default.

In addition to the fields listed there, members of the **ARP Admin** group may add other fields available for investments, investment sub-types, roles/resources and team entries to the selection (see "6.11 Configuring List and Filter Fields" on page 35).

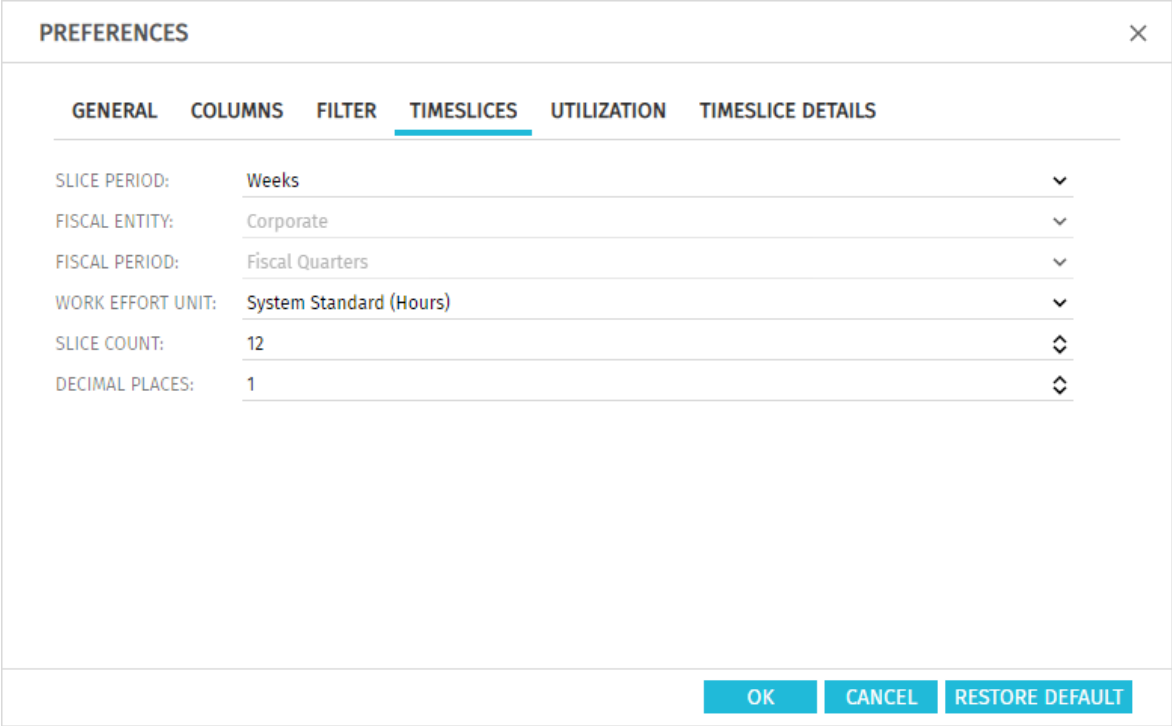
Most Clarity PPM standard fields may be added, as well as most custom fields defined for these objects.



v

- You can add filter fields to either column as well as determine their order via drag-and-drop:
  - Drag filter fields from the **Available Filters** list to either column to add them.
  - Drag filter fields from either column to the **Available Filters** list to remove them.
  - Drag filter fields between columns or within a column to change their position.
- Alternatively, you can use the buttons to the left of a column list in order to…
  - … add fields selected in its left neighbor list (right arrow).
  - … remove fields selected in the list and add these fields to its left neighbor list (left arrow).
  - … change the field order by moving selected fields up or down in the list (up/down arrow).

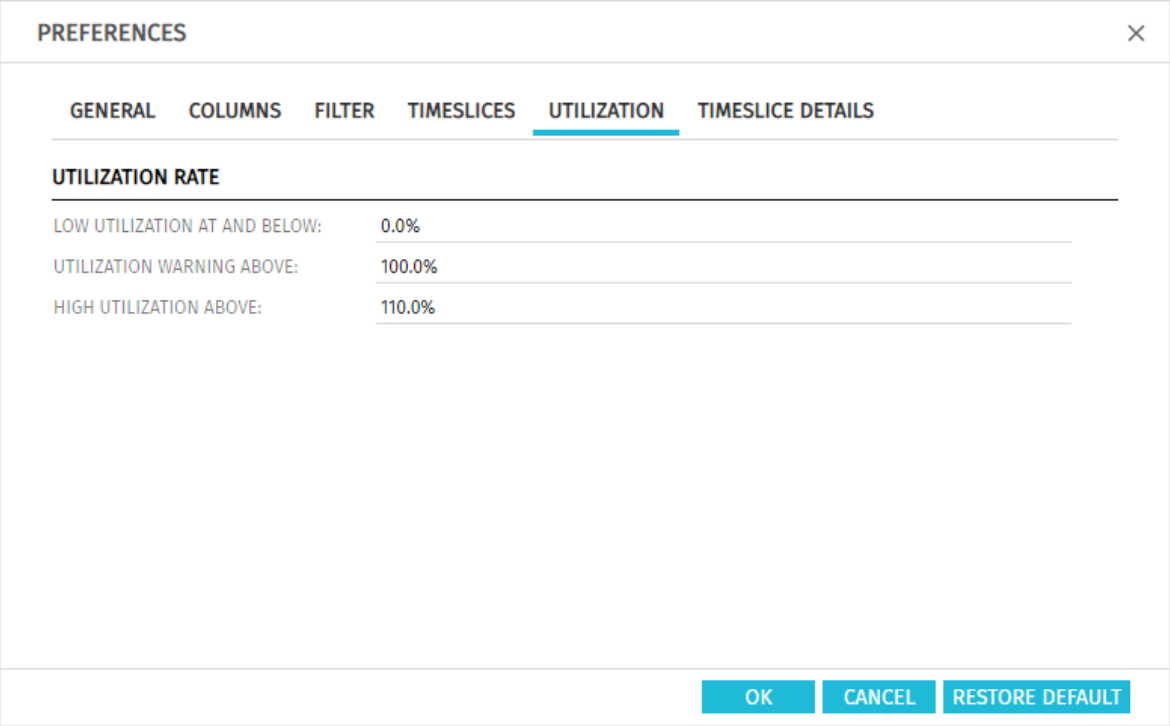
5.4 Timeslices



- **Slice Period:** enter the planning period here. Possible settings are **Weeks**, **Months**, **Quarters**, **Calendar Years** and, if configured, **Fiscal Period**.

  Please note that the selection of available slice periods may be limited by Clarity PPM application administrators via the **itd AE Preferences** lookup (see "6.12.3 Restrict Time Slice Periods in the Preferences and in the Toolbar" on page 40). In this case, only options enabled via the associated lookup value will be available here and in the lower toolbar of the itd Allocation Editor.
- **Fiscal Entity** and **Fiscal Period:** with the **Fiscal Period** setting, if multiple fiscal entities or periods have been defined in your Clarity PPM system, select the desired fiscal entity and period here.
- **Work Effort Unit:** specify the unit for efforts here. By default, the **System Standard** will be applied. Alternatively, you may select **Hours**, **Days** or full time equivalents (**FTE**) here.
- **Slice Count:** enter the amount of slices to be displayed.
- **Decimal Places:** enter the desired number of decimals for allocation values.

5.5 Utilization



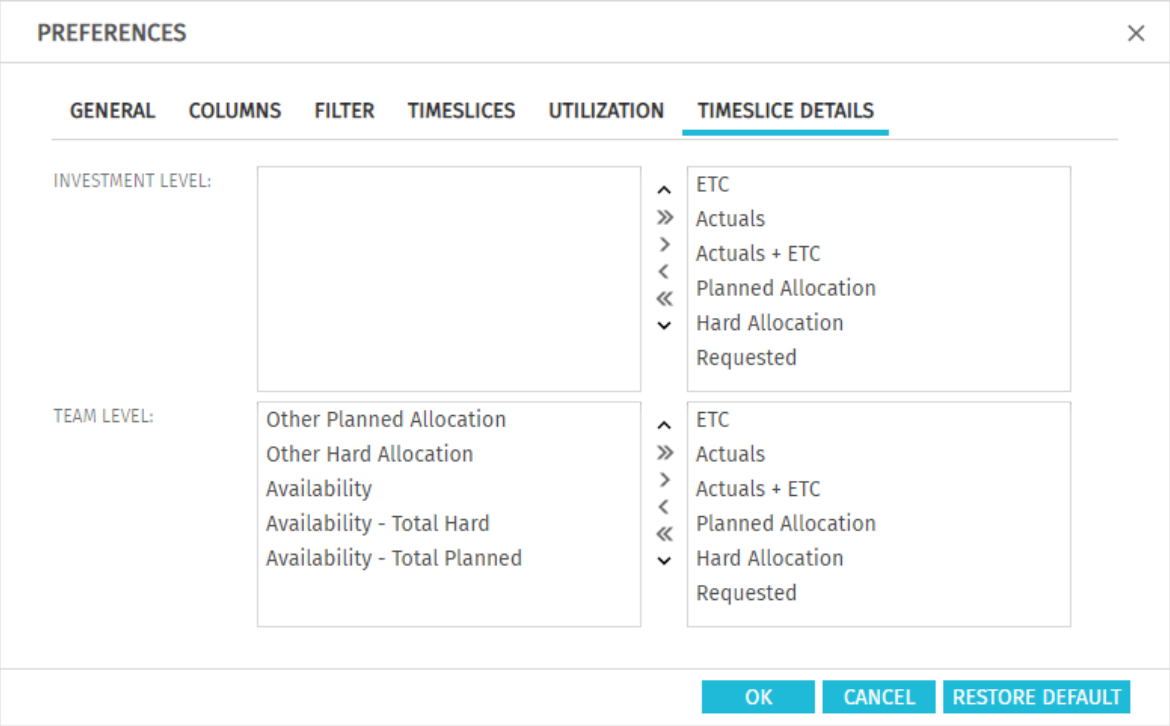
- **Low Utilization at and Below:** upper boundary of the relative utilization for which roles, resources and teams will be marked as lowly utilized with a white background in the respective period.

  Roles, resources and teams will be marked green in periods for which their utilization is between the tresholds for low utilization and utilization warning.

  In the default setting shown in the screenshot, roles, resources and teams will be marked white in periods with zero utilization and green in periods in which their utilization is over 0% and less than or equal to 100%.
- **Utilization Warning Above:** lower boundary of the relative utilization above which roles, resources and teams will be marked as slightly over-utilized with a yellow background in the respective period.

  Roles, resources and teams will be marked as slightly over-utilized as long as their utilization stays at or below the lower boundary for high utilization.
- **High Utilization Above:** lower boundary of the relative utilization above which roles, resources and teams will be marked as highly over-utilized with a red background in the respective period.

5.6 Timeslice Details



- **Timeslice Details:** hide or display aggregated working hour and availability values on the investment/role/resource and team entry levels.

  Please note that there are separate configurations for the **Allocations by Investment** and **Allocations by Resource** hierarchy view modes. Depending on your selected view mode, the investment or role/resource level will be on top. The second row is for team entry level values.

  Any values in the right list boxes will be displayed on the respective level.

  Move values left to hide them or right to display them. You can do this by dragging and dropping list items or by selecting them in the respective list and clicking the left or right arrow button next to that list.

  You may also modify the order in which values are displayed by dragging and dropping list items with the mouse or by selecting them and clicking the up or down arrow buttons next to the list.

5.7 Apply Changes, Cancel or Restore Defaults

Use the buttons below the settings to apply changes, discard changes or load the current defaults:

- Click **OK** to apply changes.
- Click **Cancel** to discard changes.
- Click **Restore default** to load the current default settings entered by a member of the **ARP Admin** group. These settings will only be applied once you click **OK**. Click **Cancel** to abort.
- Members of the **ARP Admin** group may set the current preferences as default settings for all users (see section "6.9.2 Set as Default" on page 32).

6 Administration

This chapter describes the administration of the itd Allocation Editor:

- 6.1 Requirements (page 27)
- 6.2 Supported Locales (page 27)
- 6.3 User and Administrator Groups (page 28)
- 6.4 Other Administration Rights (page 29)
- 6.5 User Access Rights (page 30)
- 6.6 Integration and Invocation (page 31)
- 6.7 Single or Multiple Investment Mode (page 31)
- 6.8 Changing Text Labels (page 31)
- 6.9 Administrative Preference Settings (page 32)
- 6.10 Defining Actions (page 33)
- 6.11 Configuring List and Filter Fields (page 35)
- 6.12 itd AE Preferences Lookup Settings (page 39)
- 6.13 Properties File (Database Access and Memory Usage) (page 42)
- 6.14 Troubleshooting (page 44)

6.1 Requirements

Starting with version 7.7.0, the itd Allocation Editor requires Clarity PPM 15.7 or higher.

6.2 Supported Locales

The following locales are currently supported:

- Danish
- Danish(Denmark)
- Dutch
- Dutch(Netherlands)
- Dutch(Belgium)
- English
- English(United Kingdom)
- English(United States)
- Finnish
- Finnish(Finland)
- French
- French(Belgium)
- French(France)
- German(Germany)
- Norwegian
- Norwegian(Norway)
- Spanish
- Spanish(Spain)
- Swedish
- Swedish(Sweden)

6.3 User and Administrator Groups

This section describes the user and administrator groups for the itd Allocation Editor.

6.3.1 ARP Users Group

The **ARP Users** group grants users the following rights:

- **Instance Access Rights**
  - Access itd Advanced Resource Planning and itd Allocation Editor pages and portlets.

Add users to this group to grant them access to either of the itd Advanced Resource Planning or the itd Allocation Editor applications.

Please note that users may also be able to use these applications if they have general page and portlet access rights. In this case, these users will be added to the **ARP Users** group when accessing either application in order to keep track of who is using the applications in your organization.

Please also note that, in order to access individual itd Allocation Editor features, users also need the required resource and investment rights listed in section "6.5 User Access Rights" on page 30.

6.3.2 ARP Admin Group

The **ARP Admin** group grants users the following administrative rights:

- **Instance Access Rights**
  - Access itd Advanced Resource Planning and itd Allocation Editor pages and portlets.
  - Edit and define itd Advanced Resource Planning and itd Allocation Editor pages and portlets.
- **Global Access Rights**
  - Full rights for **itd AE Actions** (define menu actions, see "6.10 Defining Actions" on page 33)
  - Full rights for **itd AE Attribute Configuration** (add list fields, editable fields and filter fields, see "6.11 Configuring List and Filter Fields" on page 35.)
  - Full rights for **itd AE Attribute Source** (add additional Clarity PPM standard fields to the list of available fields, please contact us if you wish to do this.)
- **Other Administrative Features in the itd Allocation Editor**
  - **User Preferences:** System Settings (see "6.9.1 System Settings" on page 32)
  - **User Preferences:** set defaults, also available with the **Portlet – Edit** right (see "6.9.2 Set as Default" on page 32.)
  - **Administrator URL Parameters:** `&flushCaches=true` (apply newly added fields, see "6.11 Configuring List and Filter Fields" on page 35.)
  - **Administrator URL Parameters:** `&systemProperties=reload` (reload properties file, see "6.13 Properties File (Database Access and Memory Usage)" on page 42.)

6.4 Other Administration Rights

This section describes other rights required for the administration of the itd Allocation Editor in addition to membership in the **ARP Admin** group.

6.4.1 itd AE Preferences Lookup Access

Some application settings are managed via the **itd AE Preferences lookup**. The ID of this lookup is **PL.ITD.AE.LKP.PREFERENCES**. Editing it requires the global **Administration – Application Setup** right, which Clarity PPM application administrators have by default.

See "6.12 itd AE Preferences Lookup Settings" on page 39 for details.

6.4.2 Properties File Access (Database Access and Memory Usage)

Some database access and memory usage settings are managed via the `pl_itd_ae.properties` file. This file is used for both itd Advanced Resource Planning and the itd Allocation Editor. It is stored in the Plugins' config directory, which defaults to `${clarity.home}/META-INF/pl_itd_ae/config`.

The file may be edited by system administrators with access to Clarity PPM files. It controls the amount of results returned by database queries, the amount of data contained in the applications' caches as well as load batch sizes when using the **Calculate Sums** option.

See "6.13 Properties File (Database Access and Memory Usage)" on page 42 for details.

6.5 User Access Rights

The following table lists all operations in the itd Allocation Editor and the required access rights for resources and investments. The list starts with the lowest access level, which is required to view team entries and associated allocations.

Please note that while **Resource Managers** always have the **Hard Book** and **View/View Financial** resource rights, they still require the listed access rights for viewing and editing investments.

Actions	Resource Access Rights	Investment Access Rights
• View team entries and associated allocations	• None, all team entries for all visible investments and associated allocations will be displayed.[1]	• View[1]
• Add new roles, resources and teams (without an existing team entry in the investment)[2] • Replace Allocation[2]	• Resource – Soft Book • Resource – Hard Book[3]	• Edit • View
• Reset or change **Role** (investment role) or **Request Status** of team entries. • Edit Planned Allocation • Allocate from Estimates • Accept Hard Allocation • Shift Allocation • Set Allocation	• Resource – Hard Book[4]	• View (in **Allocations by Investment** mode, no resource right is required with **Edit**; in Allocations by Resource mode, only **Resource – View** is required with **Edit**) [4]
• Edit Hard Allocation • Commit Planned Allocation	• Resource – Hard Book[4]	• View[4]
• Create Requisition	• None[5]	• Project – Create/Edit Requisitions

[1] In **Allocations by Investment** mode, viewing team entries and associated allocations always requires the respective investment type's **View** right (e.g., **Project – View**), and doesn't require resource rights.
This is also the default setting for **Allocations by Resource** mode. Optionally, the **Resource – View** right for associated roles, resources and teams is required instead in this mode. In this case, no investment right is required (see "6.12.4 Configure Allocations by Resource View Rights" on page 41).
[2] These actions are available with both combinations of rights listed here.
[3] **Resource – Hard Book** includes the **Resource – Soft Book** access right.
[4] With the **Edit** right for an investment type (e.g., **Project – Edit**), no resource right is required in **Allocations by Investment** mode for editing team entries (except for editing the **Hard Allocation**, which requires the **Resource – Hard Book** right).
Please note that the **Resource – View** right may be required for displaying roles, resources and teams, associated team entries and their allocations in **Allocations by Resource** mode, see (1) .
[5] **Resource – View** optionally required in **Allocations by Resource** mode, see (1).

6.6 Integration and Invocation

The itd Allocation Editor is implemented as a standard Clarity PPM HTML portlet.

- **Name:** itd Allocation Editor, **ID:** pl.itd.ae.prt.allocation.editor
- The portlet can be added to any portlet page.
- The portlet is accessible to users with appropriate access rights, similar to any other Clarity PPM portlet. Add users to the **ARP Users** group to grant them access to the itd Allocation Editor application (see "6.3.1 ARP Users Group" on page 28).

6.7 Single or Multiple Investment Mode

The itd Allocation Editor supports a single investment mode and a multiple investment mode.

Which mode is evoked when the itd Allocation Editor is opened depends on the type of the portlet page it was opened from:

- The single investment mode is evoked when the itd Allocation Editor is opened from the portlet page of an investment. In this mode, the itd Allocation editor displays a single investment as well as allocated roles, resources and teams and their allocations.

  For investments with parent objects, displaying and editing the parent hierarchy is optional, depending on the **Hide parent hierarchy levels in single investment mode** setting on the **System Settings** tab of the preferences, which is only accessible to members of the **ARP Admin** group (see "6.9.1 System Settings" on page 32).
- The multiple investment mode is evoked when the itd Allocation Editor is opened from any portlet page that is not an investment portlet page. In this mode, multiple investments will be displayed, depending on your filter settings. Allocated roles, resources and teams and their allocations will also be displayed per investment.

6.8 Changing Text Labels

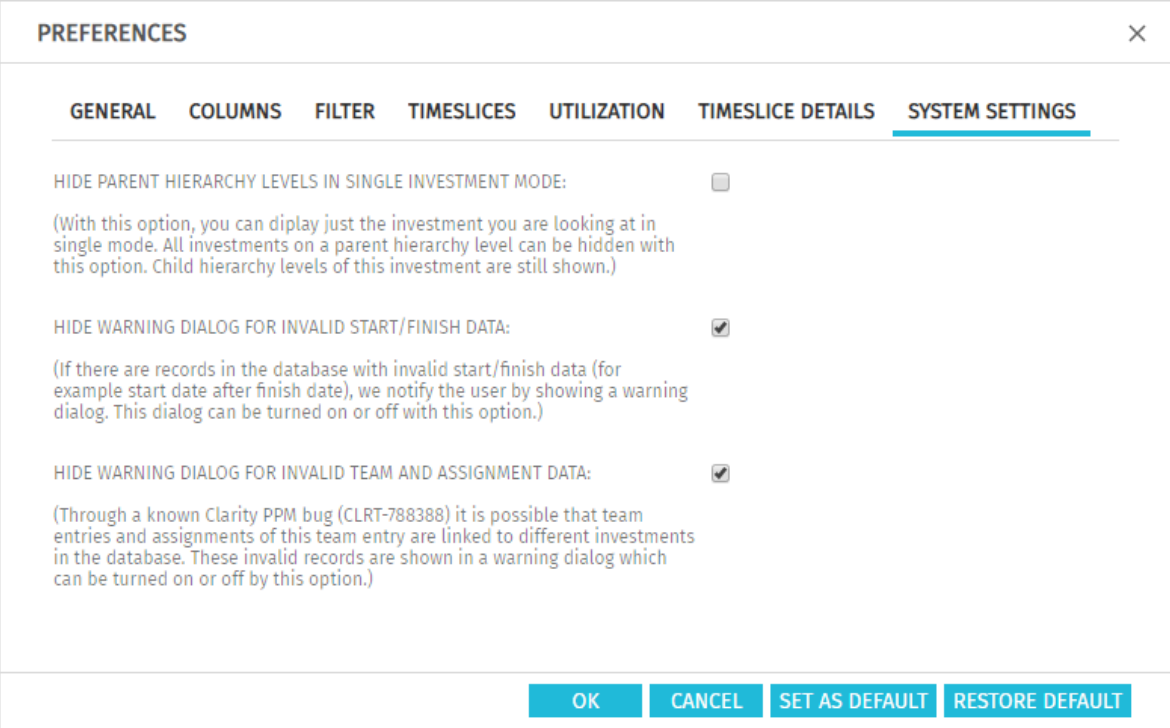
You can change any text labels displayed in itd Advanced Resource Planning and the itd Allocation Editor via a custom lookup. Please contact us if you wish to do so.

6.9 Administrative Preference Settings

In the **Preferences**, members of the **ARP Admin** group have access to the **System Settings** tab and may set the current preference settings as default for all users.

6.9.1 System Settings

The **System Settings** tab is only available to members of the **ARP Admin** group.



- **Hide Parent Hierarchy Levels in Single Investment Mode:** this option only applies to single project mode and is therefore not available in multi investment mode (see "6.7 Single or Multiple Investment Mode" on page 31).
- **Hide Warning Dialogs:** these options are global and are always available.

6.9.2 Set as Default

Members of the **ARP Admin** group and other users with the **Portlet – Edit** right have access to the **Set as default** button in the **Preferences**.

Click **Set as default** to save the current settings as defaults for all users:

- When a user first opens itd Advanced Resource Planning, her preferences will be set to the current defaults.
- When a user clicks **Restore default**, her preferences will be overwritten with the current defaults.
- For users who have already been working with the itd Allocation Editor, changing the defaults has no effect unless these users apply the new defaults by clicking **Restore default**.

6.10 Defining Actions

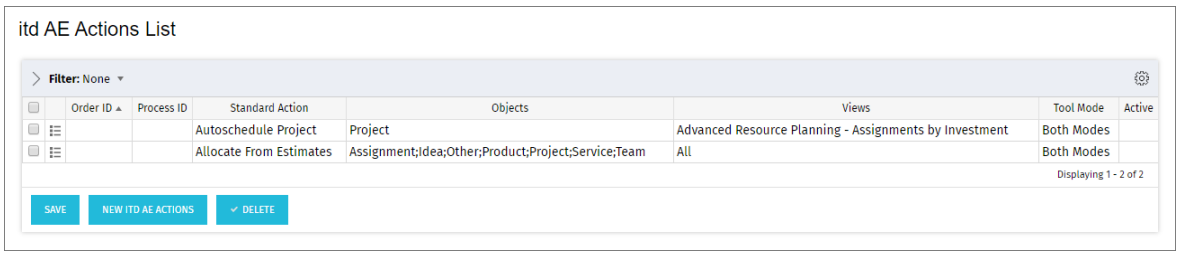
Members of the **ARP Admin** group may disable standard actions available in the itd Allocation Editor and add custom actions.

6.10.1 Accessing the Action Configuration

To access the action configuration, select **Home – Custom Objects – itd AE Actions List**.

6.10.2 Action Overview

The action list provides an overview of defined actions.

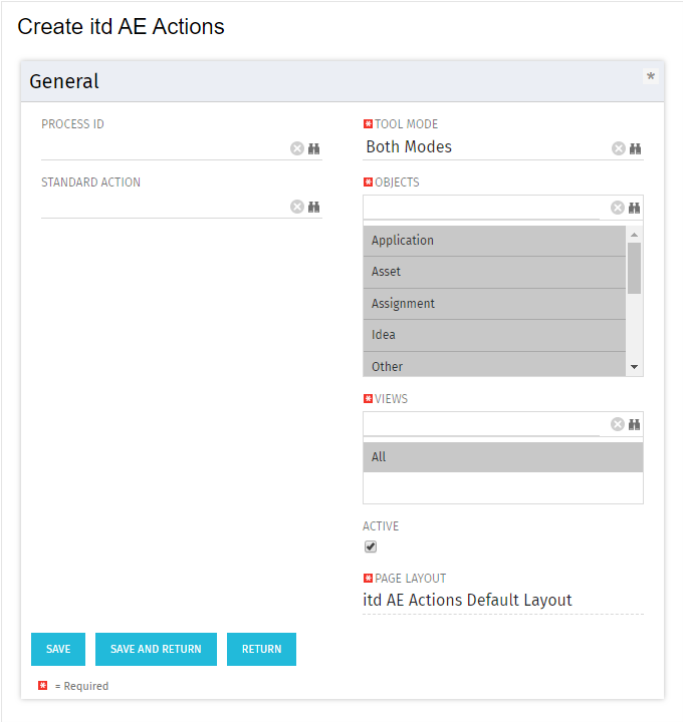


The displayed examples for deactivating standard actions are described on the following page in section „6.10.4 Examples for Deactivating Standard Actions“.

- **Order ID**: determines the order of the actions. The lowest ID will be placed first. To reorder standard actions, add them and order them via this field.
- **Process ID** and **Standard Action:** these columns define the type of the action.
- **Objects:** object types for which the action will be available.
- **Views:** this column shows on which applications and view modes the action will appear.
- **Tool Mode:** this column shows on which tool mode the action will appear (single or multiple)
- **Active:** use this column to deactivate or activate actions.

6.10.3 Adding a Custom Action or Removing a Standard Action

Click **New itd AE Actions** to create a new action object.



- Select a **Process ID** to add a process action or select a **Standard Action** to remove.
- **Process Action:** invokes a Clarity PPM process when the user invokes the action.
  - The data of the current model is transferred to the process as parameters.
  - To support processes covering different object types, we transfer the **OBJECT_TYPE** and **OBJECT_ID** of the objects for which the process should be called.
  - Select for which **Tool Mode**, **Objects** and **Views** the action should be visible.

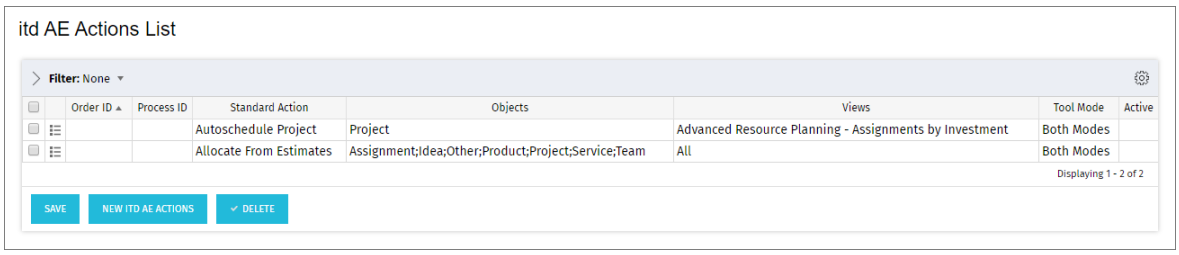
    Consider that each condition has to be fulfilled to make the action visible.
- **Standard Action:** remove a standard action completely or for selected tool modes (single or multiple investments), object types or views (applications and view modes).
  - Select the action to remove under **Standard Action**.
  - Deselect the **Active** option to remove the action altogether. To remove the action for individual tool modes, object types and views, select or remove the appropriate items.
  - **Please note**: although all tool modes, objects and views will initially be selected when adding a standard action, most standard actions are only available for some objects (listed under **Description** in the lookup browse window for selecting a standard action) and views.

    You can't add an action for an object or view for which it isn't available by default.
  - You can reset to the default for an action by deleting the associated **itd AE Actions** item.

6.10.4 Examples for Deactivating Standard Actions

The following examples deactivate these standard actions:

- **Autoschedule Project** in itd Advanced Resource Planning (Assignments by Investment) in both modes (single and multiple investment).
- **Allocate from Estimates** for all investment types, team entries and assignments in all views (for both modules itd Allocation Editor and itd Advanced Resource Planning) and in both modes.



Order ID	Process ID	Standard Action	Objects	Views	Tool Mode	Active
		Autoschedule Project	Project	Advanced Resource Planning - Assignments by Investment	Both Modes	
		Allocate From Estimates	Assignment;Idea;Other;Product;Project;Service;Team	All	Both Modes	

6.10.5 Updating the itd Allocation Editor

To update the itd Allocation Editor after changing the action configuration, simply refresh your browser by pressing [F5].

Resetting the cache for the itd Allocation Editor is not required.

6.11 Configuring List and Filter Fields

Members of the **ARP Admin** group may add list and filter fields to itd Advanced Resource Planning and to the itd Allocation Editor in the attribute configuration list. For list fields, you may also determine whether they are editable.

Using the `&flushCaches=true` URL parameter to update the applications with newly added fields also requires membership in the **ARP Admin** group.

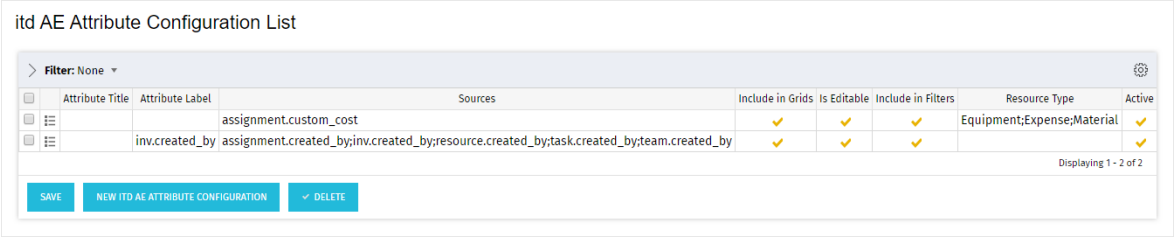
6.11.1 Accessing the Attribute Configuration List

Open the attribute configuration list via **Home – Custom Objects – itd AE Attribute Configuration List**.

6.11.2 Attribute Configuration List View

The attribute configuration list displays additional list and filter fields.

Here, you may edit, deactivate or remove fields and add new fields.

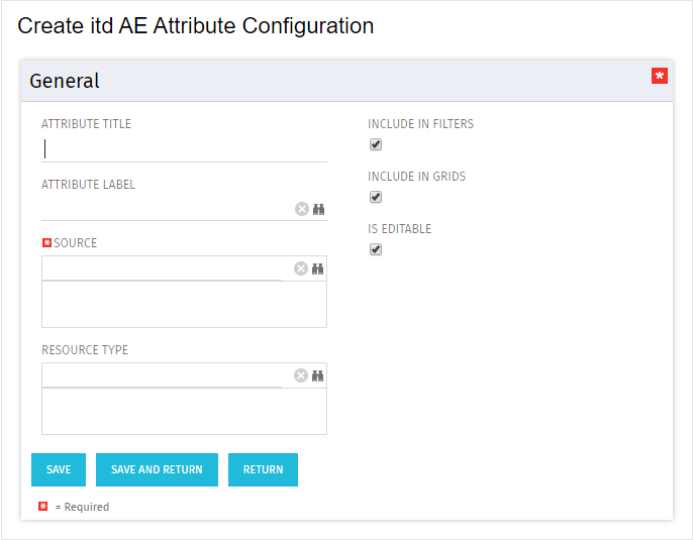


Each field has five properties to control where it is available in the itd Allocation Editor:

- **Include in Grids:** field may be added to displayed columns.
- **Is Editable:** field may be edited in the list. This is only relevant when **Include in Grid** is selected.
  Attributes configured as **Read-Only** in the **Studio** will never be editable, even if selected here.
  Some attribute types don't support editing and will never be editable, even if selected here (see "6.11.5 Supported Attribute Types" on page 37).
  This also applies to a small number of Clarity PPM default attributes.
- **Include in filters:** field may be selected as a filter field.
  Some attribute types don't support filtering and will never be available as filter fields even if selected here (see "6.11.5 Supported Attribute Types" on page 37).
  This also applies to a small number of Clarity PPM default attributes.
- **Resource Type:** this only applies to custom time scaled monetary values (**time-varying** attribute type) in itd Advanced Resource Planning.
  Defines for which resource types the value will be displayed and editable.
- **Active:** deselect this to remove a field from the selection of columns and filter fields without deleting the associated configuration.

6.11.3 Adding Fields

Click **New itd AE Attribute Configuration** to add a new field.



- **Attribute Title:** field name to display. This is only required if you don't wish to display the name of the field specified as **Attribute Label** or **Source** field.
- **Attribute Label:** field whose name to display. This is only required if you don't wish to display the name of the field specified as **Source** field, or if you are defining a field with multiple sources.

  Please note: for merged fields (fields with multiple sources), the **Attribute Label** also determines the views in which the field may be added as a **Visible Column**. See following section for details.
- **Source:** field or fields to display. You may merge fields by selecting more than one field here to display fields for multiple objects in the associated rows or to filter by multiple objects at once. In this case, consider the following:
  - Use no more than one field from each object.

    Additional fields from the same object will be ignored.
  - Use the same data type for all source fields (e.g., String or Number).

    Merged fields with multiple data types won't be selectable as columns or filter fields.
  - Select a field as **Attribute Label** to display as column header in the list. If you don't specify a label field, a random source field will automatically be selected as label field.

    Please note: The label field not only determines the displayed column header but also the views in which the merged field will be available for selection under **Columns**.

    It will be restricted to views where the label field's object is available:
    - **Assignments by Investment (itd Advanced Resource Planning only):** investments & sub-types, tasks, assignments
    - **Assignments by Resource (itd Advanced Resource Planning only):** resources, tasks, assignments
    - **Allocations by Investment:** investments & sub-types, team entries
    - **Allocations by Resource:** resources, team entries

    Examples:
    - A field with label `Project.field` will be restricted to the **by Investment** views.
    - A field with label `Resource.field` will be restricted to the **by Resource** views.

    Merged fields will always be available as filter fields for all view modes regardless of the selected label field.

- If you also specify an **Attribute Title**, that will be displayed as column header in the list instead of the **Attribute Label**. In this case, the **Attribute Label** will still determine the views in which the merged field will be available.
- See previous page for the remaining properties you can configure in this view.

6.11.4 Supported Object Types

The following object types are currently supported:

- Application
- Asset
- Assignment (itd Advanced Resource Planning only)
- Idea
- Investment
- Other
- Product
- Project
- Resource
- Service
- Task
- Team

6.11.5 Supported Attribute Types

The following attribute types are currently supported:

- String
- Large String
- Number
- Percent
- Calculated (see "6.11.6 Restrictions for Calculated and Formula Attributes" on page 38)**
- Formula (see "6.11.6 Restrictions for Calculated and Formula Attributes" on page 38)**
- Money
- Boolean
- Date
- Static Lists:
  - Single Value Number, String
  - Multi Value Number, String
- Static Dependent Lists:
  - Single Value Number, String
  - Multi Value Number, String
- Dynamic SQL (also with parameters)
  - Single Value Number, String
  - Multi Value Number, String
- URL*
- Time-varying (for assignments in itd Advanced Resource Planning only)

* This type doesn't support editing.

** This type doesn't support editing or filtering.

6.11.6 Restrictions for Calculated and Formula Attributes

Most of the attributes which can be used in a **Calculated** or **Formula** attribute are supported.

Attributes which the custom calculated/formula columns do not support:

- All Lookup attributes
- Assignment – Has Guidelines
- Investments – Business Alignment
- Investments – Include Sub-Departments
- Project – Schedule to Baseline
- Project – Schedule Variance %
- Resource – Availability Rate
- Resource – Show Resources in Sub-departments

6.11.7 Supported Attributes

You may add most Clarity PPM standard attributes and any custom attributes of supported objects and types (see "6.11.4 Supported Object Types" and "6.11.5 Supported Attribute Types" on page 37).

6.11.8 Adding Additional Clarity PPM Standard Attributes

Please contact us if you wish to add a Clarity PPM standard attribute that isn't currently supported.

6.11.9 Updating the itd Allocation Editor

After adding new attributes, you may need to reset the cache for the itd Allocation Editor to make them available in the application.

Please note that this requires membership in the **ARP Admin** group.

To do this, call the portlet with the `&flushCaches=true` URL parameter:

- https://{ca.ppm.url}/niku/nu#action:pl.itd.ae.page.allocation.editor&flushCaches=true

6.12 itd AE Preferences Lookup Settings

Some application settings are managed via the **itd AE Preferences lookup**:

- The ID of this lookup is **PL.ITD.AE.LKP.PREFERENCES**.
- Editing it requires the global **Administration – Application Setup** right.
- Clarity PPM application administrators have this right by default.

This section describes the individual itd Allocation Editor settings administered via the lookup.

The settings for itd Advanced Resource Planning are described in the "Administration" chapter of the associated manual.

6.12.1 Hide Preferences Tabs

Scope: itd Allocation Editor and itd Advanced Resource Planning

Lookup Value ID: hidden_preference_tabs

Initial Setting: active with **Description = query_limits**

Activate: set **Active = true** AND add elements to **Description**, separated by ','

Deactivate: set **Active = false** (will apply default) OR remove elements from **Description**

Possible Elements: (default: query_limits)

- general: General
- visible_columns: Columns
- filter_layout_config: Filter (in itd Advanced Resource Planning, this setting also applies to the **Filter – Assignments** and **Filter – Allocations** tabs)
- time_slice: Timeslices
- utilization: Utilization
- alloc_slice: Timeslice Details
- query_limits: Query Limits

Effect:

- Hide **Preferences** tabs listed in **Description**

6.12.2 Hide Toolbar Buttons

Scope: itd Allocation Editor and itd Advanced Resource Planning

Lookup Value ID: hidden_toolbar_buttons

Initial Setting: active with **Description = expand_all, collapse_all**

Activate: set **Active = true** AND add elements to **Description**, separated by ','

Deactivate: set **Active = false** (will apply default) OR remove elements from **Description**

Possible Elements: (default: expand_all, collapse_all)

- expand_all: **Expand all** (this may affect the performance when expanding many items)
- collapse_all: **Collapse all** (this may affect the performance when collapsing many items)

Effect:

- Hide toolbar buttons listed in **Description**

6.12.3 Restrict Time Slice Periods in the Preferences and in the Toolbar

Scope: itd Allocation Editor and itd Advanced Resource Planning

Lookup Value ID: preference_tab_time_slice

Initial Setting: deactivated with **Description = timeslice_mode: month, year, quarter**

Activate: set **Active = true** AND add elements to **Description**, separated by ','

Deactivate: set **Active = false** (will apply default) OR remove elements from **Description**

Possible Elements: (default: all)

- day: Days
- week: Weeks
- month: Months
- quarter: Quarters
- year: Calendar Years
- fiscal_period: Fiscal Period

Effect:

- Only time slice periods listed in the **Description** will be available for selection in the **Preferences** and in the toolbar.

6.12.4 Configure Allocations by Resource View Rights

Scope:

- itd Allocation Editor, **Allocations by Resource**
- itd Advanced Resource Planning, **Allocations by Resource**

Lookup Value ID: resource_view_right_all_by_res

Initial Setting: inactive (lookup value doesn't exist)

Activate: create lookup value with **Lookup Value Name = 1** AND **Active = true** AND add elements to **Description**, separated by ','

Deactivate: set **Lookup Value Name = 0 OR** set **Active = false OR** remove elements from **Description**

Possible Elements: (add both to apply to both modes)

- SINGLE_INV: apply setting to single investment mode
- ALL_INV: apply setting to multiple investment mode

Effect:

- By default, the **Allocations by Resource** view will display any roles, resources and teams with team entries for investments for which the user has the respective **View** right.
- With this setting, all roles, resources and teams for which the users has the **Resource – View** right and associated team entries will be displayed instead. In this case, no investment rights are required.
- The setting may be activated for single investment mode and multiple investment mode independently by adding either or both of **SINGLE_INV** and **SINGLE_INV** to the **Description**.

6.12.5 Initially Load Investment Structure in Investment Modes

Scope:

- itd Allocation Editor, **Allocations by Investment**
- itd Advanced Resource Planning, **Assignments/Allocations by Investment**

Lookup Value ID: calc_inv_has_children_flag

Initial Setting: active (lookup value doesn't exist)

Activate: set **Lookup Value Name = 1 OR set Active = false**

Deactivate: create lookup value with **Lookup Value Name = 0** AND **Active = true**

Effect:

- By default, in the investment modes, opening or refreshing the view will load the complete sub-structure of each displayed investment. In the itd Allocation Editor's **Allocations by Investment** mode this includes sub investments and team entries.

  The expand icon will then only be displayed for investments with a sub-structure.

  Loading the complete sub-structure of each investment can take considerable time, depending on the exact data structure.
- Create a lookup value with **Lookup Value Name = 0**, **ID = calc_inv_has_children_flag** and **Active = true** to prevent loading the full sub-structure of each investment when the view is opened or refreshed, saving some loading time.

  The expand icon will then be displayed for all investments without checking whether they do have a sub-structure. Clicking this icon will load existing sub-structures or hide the icon where no sub-structure exists.

6.12.6 Updating the itd Allocation Editor

After changing settings for the itd Allocation Editor via the **itd AE Preferences** lookup, you need to reset the cache to apply the new settings.

Please note that this requires membership in the **ARP Admin** group.

To do this, call the portlet with the `&flushCaches=true` URL parameter:

- https://{ca.ppm.url}/niku/nu#action:pl.itd.ae.page.allocation.editor&flushCaches=true

6.13 Properties File (Database Access and Memory Usage)

Some database access and memory usage settings are managed via the `pl_itd_ae.properties` file. This file is used for both itd Advanced Resource Planning and the itd Allocation Editor. It is stored in the Plugins' config directory, which defaults to `${clarity.home}/META-INF/pl_itd_ae/config`.

The file may be edited by system administrators with access to Clarity PPM files. It controls the amount of results returned by database queries, the amount of data contained in the applications' caches as well as load batch sizes when using the **Calculate Sums** option.

This section describes the settings available in the properties file.

6.13.1 Query Limits

When Investments, Resources and Assignments are retrieved from the database, the query limits parameters can limit the number of records held in memory and returned to the client.

These values may be edited via the `pl.itd.ae.query.limit.*` properties:

```
# Query limits
pl.itd.ae.query.limit.resources=50
pl.itd.ae.query.limit.investments=150
pl.itd.ae.query.limit.assignments=500
```

6.13.2 Cache Sizing

The server-side caching mechanism we use (Guava Caches) allows for the definition of the Cache's maximumSize().

You may edit these values via the `pl.itd.ae.cache.maximum.size.*` properties:

```
# Cache control values
pl.itd.ae.cache.maximum.size.clarity.system.attributes=1
pl.itd.ae.cache.maximum.size.loading.pattern.lookup=1
pl.itd.ae.cache.maximum.size.investment=10
pl.itd.ae.cache.maximum.size.nipo.effort.task=100
pl.itd.ae.cache.maximum.size.nipo.assignments=100
pl.itd.ae.cache.maximum.size.investment.team=100
pl.itd.ae.cache.maximum.size.investment.curve=10
pl.itd.ae.cache.maximum.size.clarity.team.curve=10
pl.itd.ae.cache.maximum.size.global.rights.by.user=100
pl.itd.ae.cache.maximum.size.object.permission.by.user=40
pl.itd.ae.cache.maximum.size.translation.cache=20
pl.itd.ae.cache.maximum.size.static.lookup=300
pl.itd.ae.cache.maximum.size.calender=1
pl.itd.ae.cache.maximum.size.project.hpd.factor=1
```

Please note: Not all of these values apply to the itd Allocation Editor.

Changing these values will not impact the amount of data loaded and used, only the amount of data that is cached for later use. Raising these values will take up more working memory. Lowering these values will result in reduced performance.

6.13.3 Load Batch Sizing

In the itd Allocation Editor, aggregated values will be calculated and displayed for all visible aggregation levels (investment, role/ resource). These data will be loaded from Clarity PPM curves. Curves will be loaded in batches to save heap space.

You may configure the size of these batches. You may edit these values via the `pl.itd.ae.cache.max.batch.size.for.curve.*` properties:

```
# batch size for curve
pl.itd.ae.cache.max.batch.size.for.curve.task=100
pl.itd.ae.cache.max.batch.size.for.curve.resource=100
pl.itd.ae.cache.max.batch.size.for.curve.investment.resource=100
pl.itd.ae.cache.max.batch.size.for.curve.investment=100
```

Please consider the following when adjusting these numbers:

- Not all of these values apply to the itd Allocation Editor.
- Lower values will cause more frequent requests to the database
- Higher values will increase the amount of working memory used during these calculations.

6.13.4 Updating the itd Allocation Editor

After changing the properties file, reload the file in the itd Allocation Editor to update the application.

Please note that this requires membership in the **ARP Admin** group.

To do this, call the portlet with the `&systemProperties=reload` URL parameter:

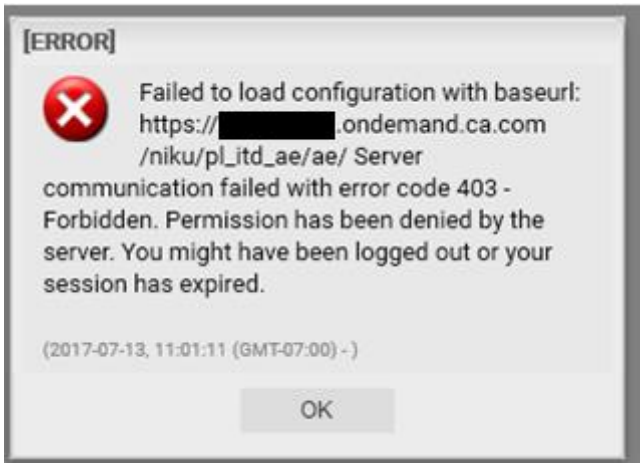
- https://{ca.ppm.url}/niku/nu#action:pl.itd.ae.page.allocation.editor&systemProperties=reload

6.14 Troubleshooting

This section provides solutions for known issues with the itd Allocation Editor.

6.14.1 Failed to load configuration with baseurl - error 403 – Forbidden

Issue: any user trying to access the itd Allocation Editor, including system administrators, gets a "403 – Forbidden" error.



Cause: reference to the `pl_itd_ae` component removed from the `components.xml` file.

This may happen when a general patch is installed on the Clarity PPM server (not necessarily for the affected customer).

Solution: insert line `<component id="pl_itd_ae" active="true" type="plugin"/>` in `components.xml` file or reinstall the itd Allocation Editor application.

The latter is the only viable solution for SaaS systems.