KINTANA™

Managing Resources in Kintana

Version 5.0.0

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Kintana Version 5.0.0

Kintana, Inc.
1314 Chesapeake Terrace, Sunnyvale, California 94089
Telephone: (408) 543-4400
Fax: (408) 752-8460
http://www.kintana.com

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Chapter 1 Introduction

Kintana provides an array of tools for managing Resources. Organizational modeling capabilities keep track of where Resources are located and who they report to. Skill modeling capabilities unlock the potential of Resources. As Resources are assigned to Tasks and Requests, executives and managers have full visibility into the capacity of their teams and the load placed on them, in terms of both current operational use and capacity planning for the future.

- To support current Demand and Project planning, Kintana delivers a set of visualizations and related tools that managers and individual Resources can use to communicate each others' needs and capabilities. These include work calendars, standard planning fields on Tasks and Requests, and Resource load and capacity histograms.
- To support future Demand and Project planning, Resource forecasting capability is achieved with Staffing Profiles and Resource Pools. High-level visualizations help Program and Resource managers with assessing Project feasibility and timing, and with making advance staffing decisions and allocations.

This document provides instructions for managing your Resources using Kintana. This includes modeling your Organizations in Kintana, setting up Resource Categories and Calendars, creating Staffing Profiles and Resource Pools, and visualizing Resource load and capacity across the system.

This document discusses the following topics:

- *Key Concepts*
- *Before Starting*
- *Modeling Your Organization*
- *Using Resource Management for Capacity Planning*
- *Using Resource Management for Operational Planning*

- *Useful Screens*

Who Should Read This Guide

This document provides details for defining, configuring, and using Kintana's Resource management functionality.

This business application guide is used primarily by:

- Business or technical users who configure and maintain Resources or an Organization model using Kintana
- Business users responsible for creating and managing Projects or Requests using Kintana
- Business users responsible for forecasting capacity and Resource allocations to Projects and Programs
- Managers responsible for reporting on Projects or Requests

How to Use This Guide

This document provides background information and details for configuring Kintana to manage your Resources. Navigate to one of the above chapter topics or use the Index to find information related to key words.

If viewing this guide online, you can use the Kintana Library page's search functionality to quickly locate desired topics in this and other Kintana publications.

What This Guide is NOT

This business application guide is not meant to provide detailed information on every screen and field in Kintana. For detailed screen and field information on Requests and Projects, refer to the Kintana Application Reference Guides, accessible from the Kintana Library. See *"Other Resources"* on page 3 for a list of the most relevant documents.

Other Resources

Kintana provides the following additional resources to help you successfully implement, configure, maintain and fully utilize your Kintana installation:

- *Kintana Documentation*
- *Kintana Services*
- *Kintana Education*
- *Kintana Support*

Kintana Documentation

The following Kintana product documents are accessible from the Kintana Library page. This page is accessed by selecting **HELP -> KINTANA LIBRARY** from the Kintana Workbench menu.

Kintana Business Application Guides:
Provides instructions for modeling your business processes in Kintana. These documents contain process overviews, implementation instructions, and detailed examples.

- Configuring a Request Resolution System (Create)
- Configuring a Deployment and Distribution System (Deliver)
- Configuring a Release Management System
- Integrating the Kintana Products
- Configuring the Kintana Dashboard
- Managing Your Resources with Kintana
- Kintana Reports

User Guides:
Provides end-user instructions for using the Kintana products. These documents contain comprehensive processing instructions.

- Processing Packages (Deliver) User Guide
- Processing Requests (Create) User Guide
- Processing Projects (Drive) User Guide
- Kintana Reports

- Navigating the Kintana Workbench:
  Provides an overview of using the Kintana Workbench
- Navigating Kintana:
  Provides an overview of using the Kintana (HTML) interface

Kintana Application Reference Guides:
Provides detailed reference information on other screen groups in the Kintana Workbench. Also provides overviews of Kintana's command usage and security model.

- Workbench Reference: Deliver
- Workbench Reference: Configuration
- Reference: Using Commands in Kintana
- Reference: Kintana Security Model
- Workbench Reference: Create
- Workbench Reference: Dashboard
- Workbench Reference: Sys Admin
- Workbench Reference: Drive
- Workbench Reference: Environments

Kintana Instance Administration Guides:
Provides instructions for administrating the Kintana instances at your site. These documents include information on user licensing and archiving your Kintana configuration data.

- Users and Licensing
- Kintana Migration

External System Integration Guides:
Provides information on how to use Kintana's open interface (API) to access data in other systems. Also discusses Kintana's Reporting meta-layer which can be used by third party reporting tools to access and report on Kintana data.

- Kintana Open Interface
- Kintana Reporting Meta-Layer

Kintana Services

Kintana is a strategic partner to its clients, assisting them in all aspects of implementing a Kintana technology chain - from pilot project to full implementation, education, project turnover, and ongoing support. Our Total Services Model tailors solution and service delivery to specific customer needs, while drawing on our own knowledgebank and best practices repository. Learn more about Kintana Services from our Web site:

http://www.kintana.com/services/services.shtml

Kintana Education

Kintana has created a complete product training curriculum to help you achieve optimal results from your Kintana applications. Learn more about our Education offering from our Web site:

http://www.kintana.com/services/education/index.shtml

Kintana Support

Kintana provides web-based interactive support for all products in the Kintana product suite via Contori.

http://www.contori.com

Login to Contori to enter and track your support issue through our quick and easy resolution system. To log in to Contori you will need a valid email address at your company and a password that will be set by you when you register at Contori.

Chapter 2
Key Concepts

The following key concepts and definitions are used when setting up Resource management in Kintana.

- *Resource*
- *Resource Pool*
- *Staffing Profile*
- *Organization Unit*
- *Skill*
- *Work Item*
- *Assignment (Booking)*
- *Load Balancing*
- *Calendar*
- *Non-Workload Items*

Resource

A Resource is a Kintana user who performs work tracked by Kintana. Resources in Kintana can include employees, contractors, managers, or any other category your organization may need. Resources have the following key attributes:

- SKILL — A Skill is an ability or area of knowledge tracked by Kintana. See *"Skill"* on page 13 for more detailed information on Resource Skills.

- COST RATE — This rate is the hourly cost associated with a Resource or Skill. This rate often represents the charge-back or billed cost of their labor.
- WORKLOAD CAPACITY — This is a percentage that indicates what portion of a full working day is available for a Resource for planned workload items, on average.

Example

For instance, a particular DBA may reserve 20% of her time for routine maintenance activities that are not tracked by Kintana. The WORKLOAD CAPACITY available for work tracked by Kintana is therefore set to 80%.

When a Resource is set as the RESOURCE for a Task or the ASSIGNED TO user on a Request, that Resource is booked for the Task or Request.

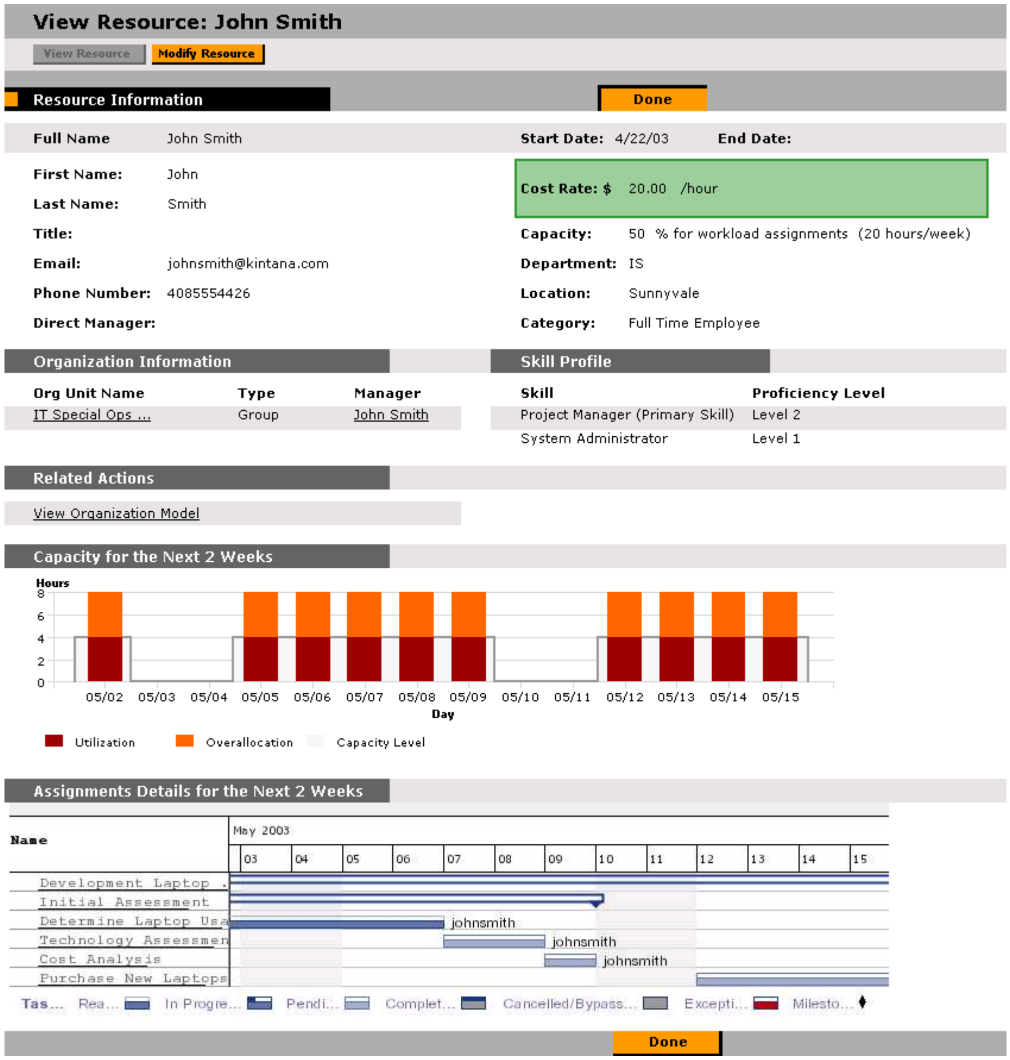


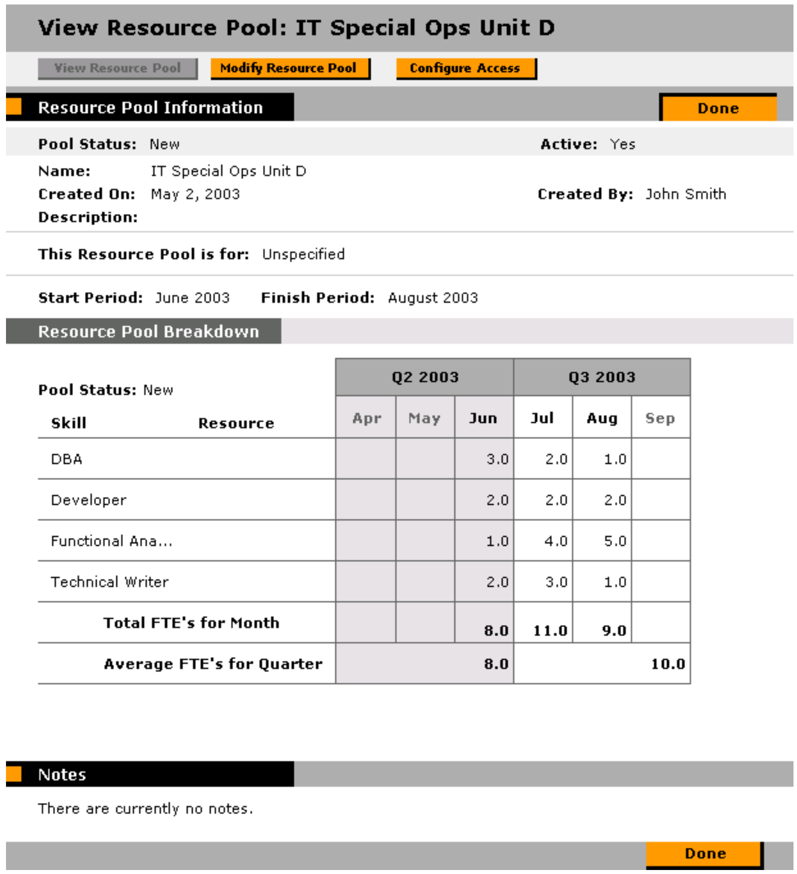
Figure 2-1 Resource with Cost information, Capacity graph, and Gantt chart with assignment details

Resource Pool

A Resource Pool defines a group of Resources, organized by skill or Resource name, from which Staffing Profiles may draw for their staffing needs. Each line in a Resource Pool presents the planned capacity, within the Pool, for some skill or Resource (by name) over a range of fiscal months. Resource Pools provide a way for managers to plan the forecast workload capacity of a group of Resources.

Note

The level of budgeting within each fiscal month is expressed as the number of “Full Time Equivalents,” or the equivalent number of full-time Resources.


View Resource Pool: IT Special Ops Unit D

View Resource Pool | Modify Resource Pool | Configure Access

Resource Pool Information — Done

Pool Status: New **Active:** Yes
Name: IT Special Ops Unit D
Created On: May 2, 2003 **Created By:** John Smith
Description:

This Resource Pool is for: Unspecified

Start Period: June 2003 **Finish Period:** August 2003

Resource Pool Breakdown

Pool Status: New

Skill	Resource	Q2 2003 Apr	May	Jun	Q3 2003 Jul	Aug	Sep
DBA				3.0	2.0	1.0	
Developer				2.0	2.0	2.0	
Functional Ana...				1.0	4.0	5.0	
Technical Writer				2.0	3.0	1.0	
Total FTE's for Month				**8.0**	**11.0**	**9.0**	
Average FTE's for Quarter				**8.0**			**10.0**

Notes

There are currently no notes.

Done

Figure 2-2 Resource Pool

Staffing Profile

A Staffing Profile specifies an allocation of Resources between specified start and finish dates. Between these dates, the Staffing Profile specifies the skill and Resources allocated for each period. Each line in a Staffing Profile indicates an allocation of one or more Resources in some or all time periods. The line can designate a skill or a specific Resource in the Kintana system.

Note

The level of budgeting within each fiscal month is expressed as the number of “Full Time Equivalents,” or the equivalent number of full-time Resources.

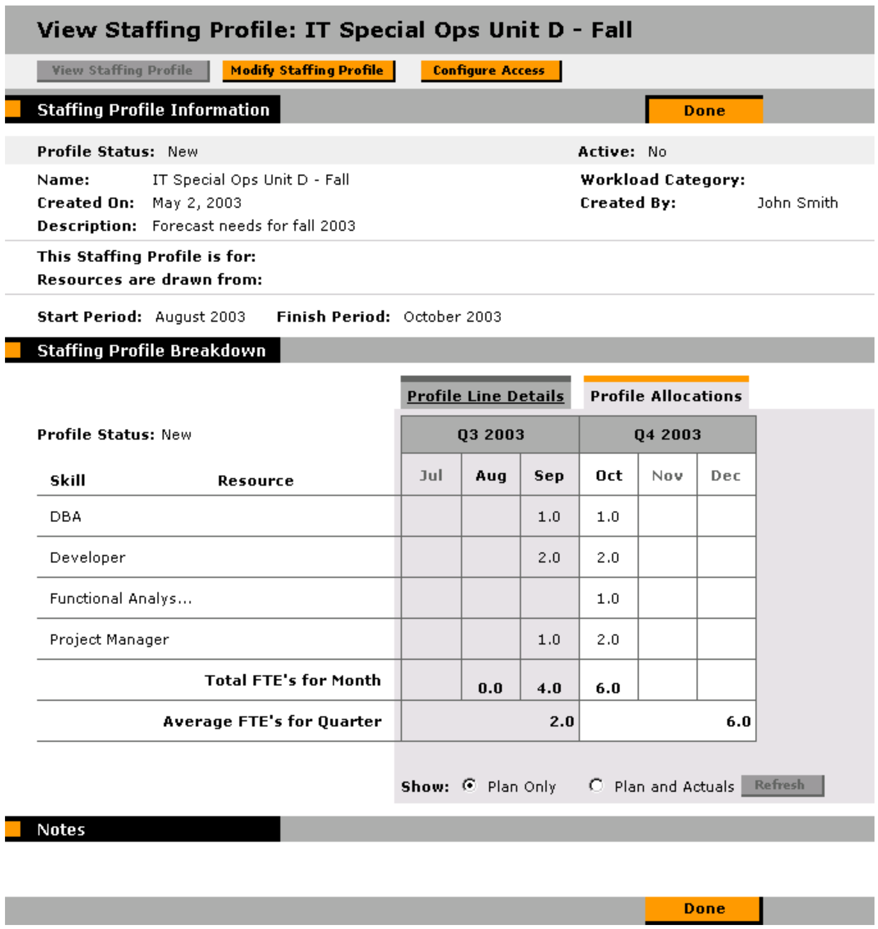


Figure 2-3 Staffing Profile

Organization Unit

Organization Units make up the building blocks of an organization model, which is a representation in Kintana of the relevant reporting structures and associations within an organization. In Kintana, a single Organization Unit can be made up of any relevant collection of Resources, such as a single team and its manager. An Organization Unit could also be made up of a smaller group of people inside a department and their team leader; use the CATEGORY field to differentiate between different types of Organization Units.

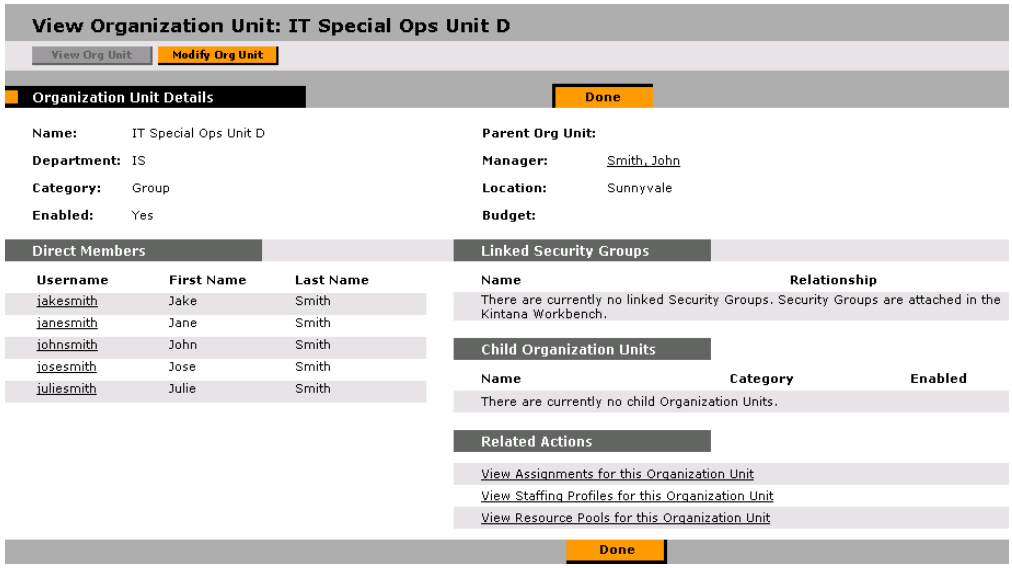


Figure 2-4 Organization Unit

Organization Units can be arranged into a hierarchy that makes up the organization model. A typical hierarchy structure might involve several Department Organization Units with child Organization Units.

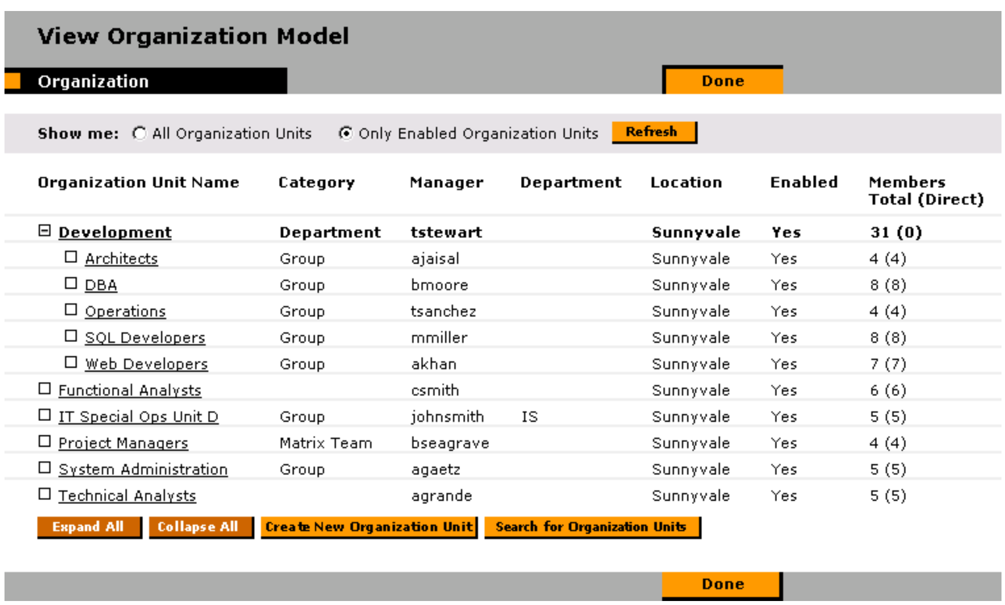


Figure 2-5 Organization Model

Organization Units can also be linked to Security Groups in Kintana. The Organization Unit can define the Security Group's membership, distributing the responsibility for maintaining the Security Group from Kintana Administrators to qualified business users.

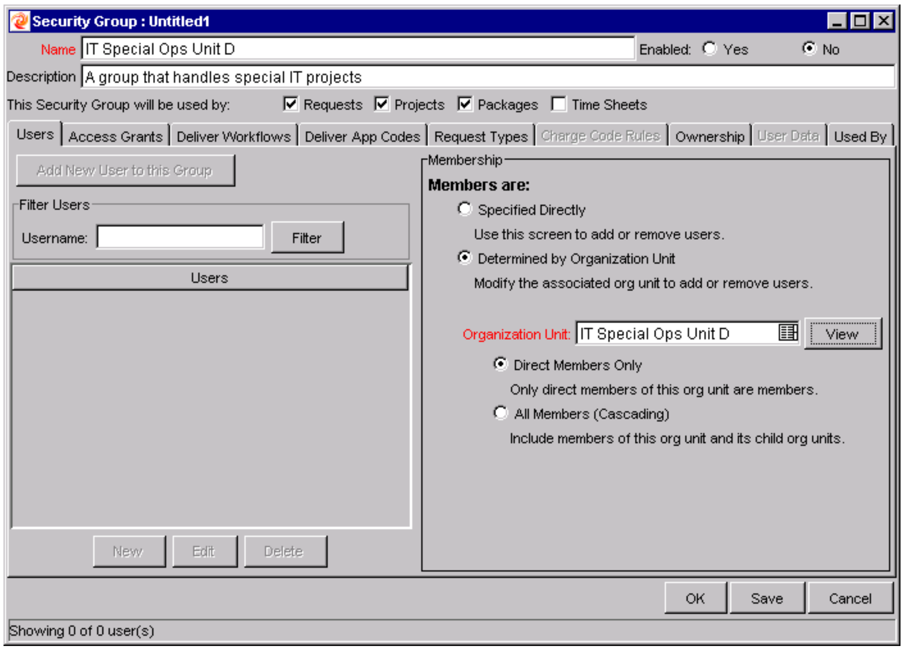


Figure 2-6 Security Group with members determined by an Organization Unit

An Organization Unit can define the members in a Security Group in the following ways:

- **Direct Members Only** — Only the direct members of the Organization Unit are members of the Security Group.
- **All Members (Cascading)** — The direct members of the Organization Unit as well as the members of its child Organization Units (if any) are members of the Security Group.

Skill

A Skill is an ability or area of knowledge tracked by Kintana.

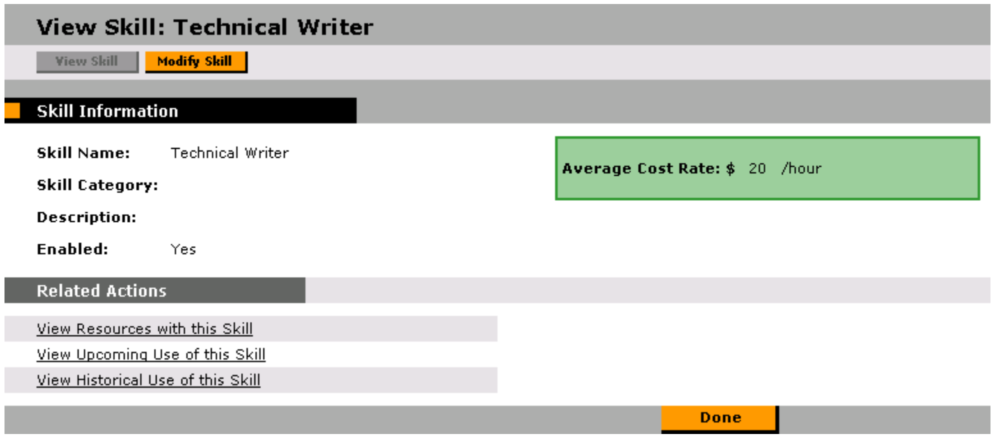


Figure 2-7 Skill

Skills are associated with Resources. A single Resource can have multiple Skills of various proficiency levels. Once multiple Skills have been assigned, a Primary Skill for each Resource must be designated.

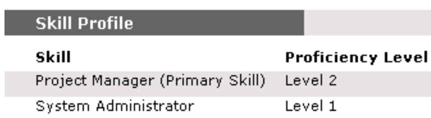


Figure 2-8 Skill Profile for a Resource with multiple Skills

When a Resource is assigned, or booked, for a Task or Request, their Primary Skill is associated with the booking by default.

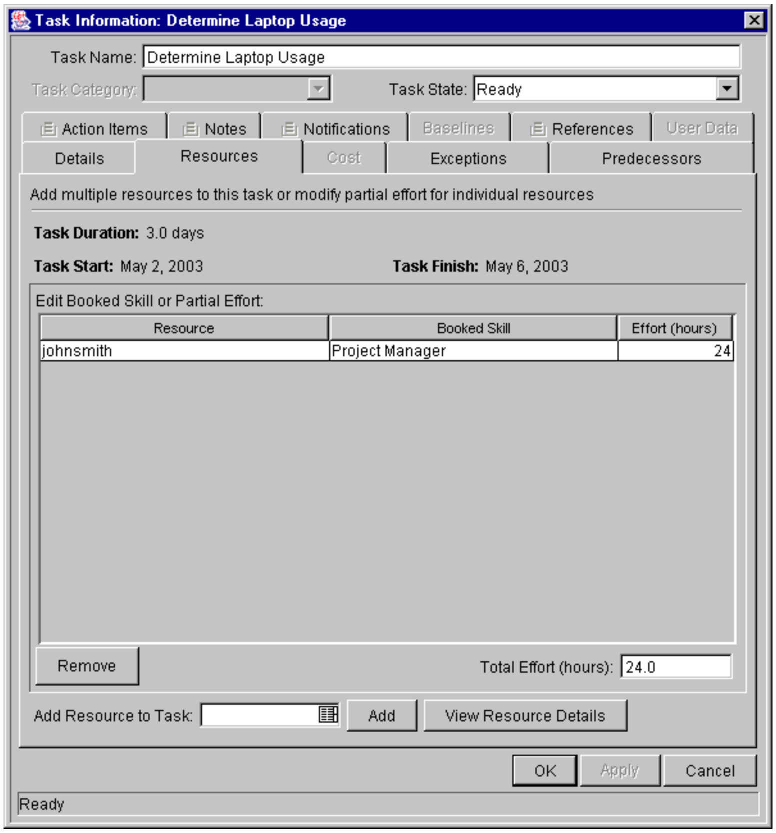


Figure 2-9 Task Information window showing Resource booked for Primary Skill

Skills are also used to create a *Staffing Profile* or *Resource Pool*.

Work Item

A work item a unit of work that can be planned, estimated, and tracked to collect actuals as a Resource completes it. In Kintana, a Work Item can be a Request or a Task.

Work Items have the following attributes:

- Scheduled start date
- Scheduled finish date
- Scheduled duration
- Scheduled effort

- Assigned Resources
  - Task Work Items can be booked to one or more Resources.
  - Request Work Items can be assigned only to a single Resource.
- Scheduled effort for each assigned Resource
  - Defaults based on the scheduled duration (for each Resource).
  - The sum of all assigned Resources' scheduled efforts on a Task Work Item will be the total scheduled effort for the Work Item.
- Skill used by each assigned Resource (Defaults to Primary Skill of each Resource)
  - If the Resource has no Primary Skill specified, the Skill defaults to "unspecified"
- Percent complete
  - Automatically updated by the Workflow for Requests
  - Manually maintained on Tasks
- Actual start date
- Actual finish date
- Actual duration
- Actual effort

Assignment (Booking)

Assigning or booking a Request or Task to a Resource automatically assigns or books the Work Item for that Resource. There is no need to separately book the Work Item in a different interface. Similarly, when the scheduled dates, assignment, or other booking information are altered or cleared, the booking information is also automatically updated or cleared.

Assigning or booking a Resource for a Work Item automatically books the Resource's Primary Skill, if one is specified.

Load Balancing

A common task for Project managers and demand managers is to assign Work Items to Resources in a balanced way, so that assignments do not exceed individuals' working capacity. A Project manager assigns tasks to project team members and needs to ensure that the plan does not place excessive load on any Resource. A demand manager who is responsible for a flow of Requests will assign these Requests to team members, and similarly needs to ensure that no team member is overloaded. This task of balancing the assignments of all Resources is commonly referred to as load balancing.

Kintana Resource Management provides key visualizations of assignments that help managers to discover when Resources are overallocated, and when they aren't being efficiently allocated, giving them better control and visibility over their Resources' workload.

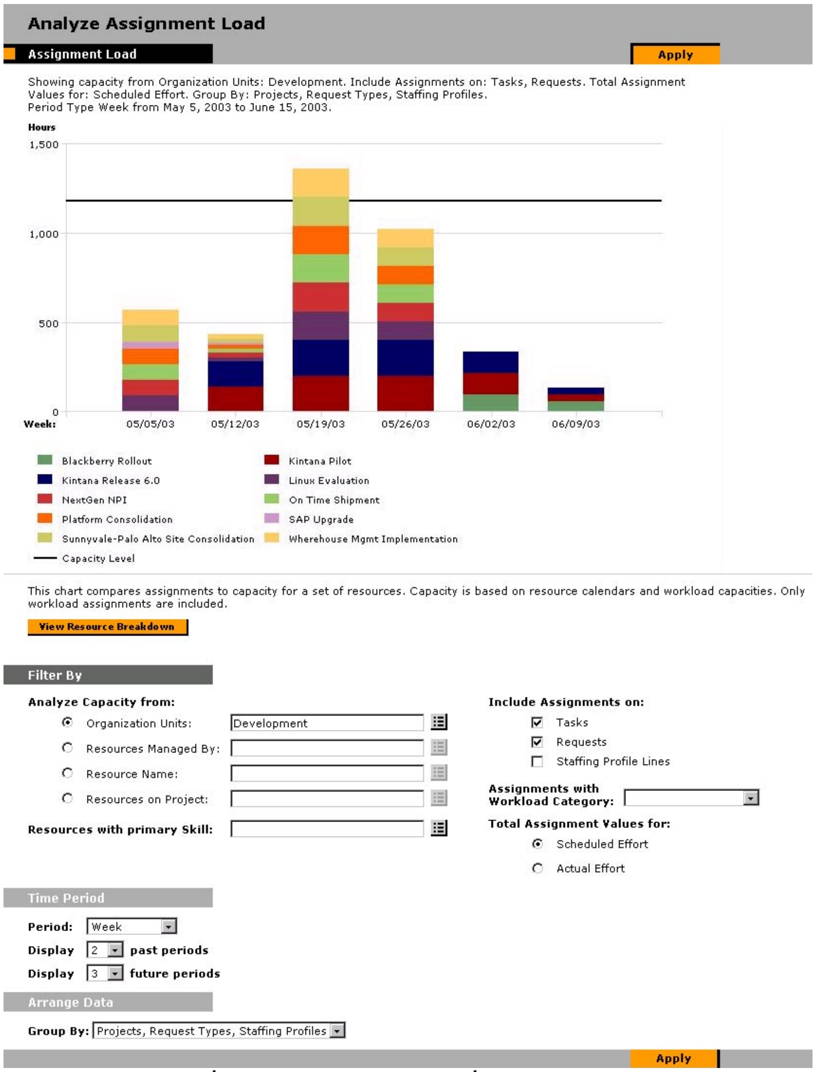


Figure 2-10 Analyze Assignment Load page

Calendar

Kintana Resource Management can make use of one or both of the following calendar types when planning Resource assignments and load visualization:

- *Base Calendar*
- *Resource Calendar*

Base Calendar

The base calendar is the default calendar used by Kintana. It specifies working and non-working days for your entire business. Non-working days can be specified and are not counted when calculating load and capacity for all Resources in the system.

Resource Calendar

Each Resource can have their own calendar, which specifies their own specific working and non-working days, such as sick time or a pre-planned vacation. Once specified in a Resource's calendar, non-working days are not counted when calculating load and capacity for that Resource.

Non-Workload Items

Kintana may not be used to track all of the work that a Resource does. For instance, a Resource in an IT department answers questions, handles trouble ticket escalations, and attends team meetings in addition to completing assigned tasks in projects. To account for these activities, Kintana uses a Resource WORKLOAD CAPACITY setting that indicates what portion of the Resource's time is available for planned workload items. See *"Resource"* on page 7 for more detailed discussion of WORKLOAD CAPACITY.

Chapter 3 Before Starting

Before using Kintana's Resource Management functionality, there are a few entities that should be set up first. This will ensure that Resource Management best fits your organization and processes.

The following sections discuss these setup items in more detail:

- *Setting Up Resource Management Validations*
- *Setting Up Skills*
- *Setting Up the Base Calendar*
- *Setting Up Request Work Item Fields*

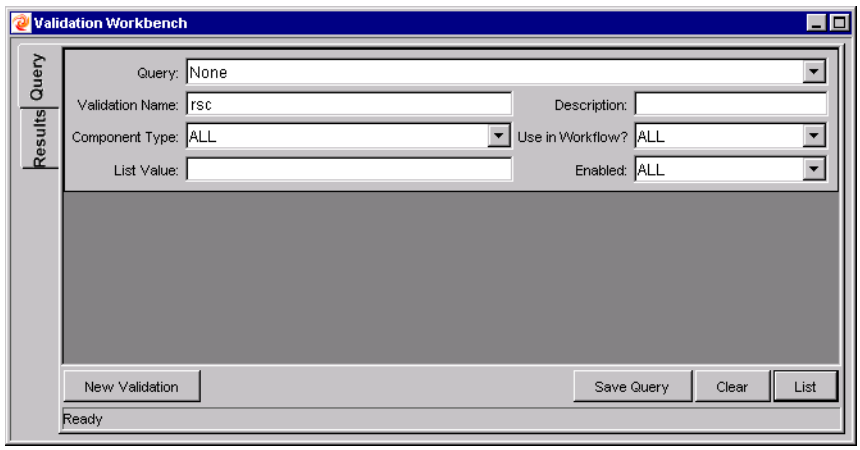
Setting Up Resource Management Validations

Kintana's Resource Management functionality employs several Validations that should be configured prior to using it, for maximum effectiveness.

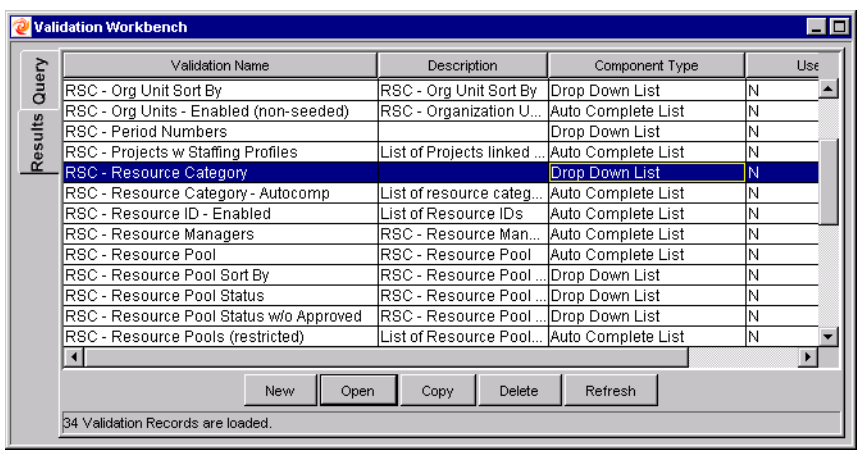
- All Resources have an optional CATEGORY field that can be used to assist Resource searches.
- All Resources have an optional LOCATION field that can be used to assist Resource searches.
- All Skills have an optional CATEGORY field that can be used to assist Skill searches.
- All Organization Units have an optional CATEGORY field that can be used to assist Organization Unit searches.
- All Work Items have an optional WORKLOAD CATEGORY field that can be used to divide Work Items into major reporting categories for analysis purposes.

To modify the values for these field Validations:

1. Log onto Kintana.
2. Select **ADMINISTRATION -> OPEN KINTANA WORKBENCH** to launch the Kintana Workbench interface.
3. Click the **CONFIGURATION** screen group and click the VALIDATIONS screen. The VALIDATION WORKBENCH opens.



4. Enter "rsc" into the VALIDATION NAME field and click **LIST**. The **RESULTS** tab opens with all of the seeded Resource Management Validations listed.



5. Modify the Validations of your choice:
   - Double-click the **RSC - RESOURCE CATEGORY** drop down list Validation. The VALIDATION window opens with the **RSC - RESOURCE CATEGORY** drop down list loaded. Seeded values are provided for this Validation.

- Double-click the **RSC - LOCATION** drop down list Validation. The VALIDATION window opens with the **RSC - LOCATION** drop down list loaded. Seeded values are not provided for this Validation.

- Double-click the **RSC - ORG UNIT CATEGORY** drop down list Validation. The VALIDATION window opens with the **RSC - ORG UNIT CATEGORY** drop down list loaded. Seeded values are not provided for this Validation.

- Double-click the **RSC - SKILL CATEGORY** drop down list Validation. The VALIDATION window opens with the **RSC - SKILL CATEGORY** drop down list loaded. Seeded values are not provided for this Validation.

- Double-click the **RSC - WORKLOAD CATEGORY** drop down list Validation. The VALIDATION window opens with the **RSC - WORKLOAD CATEGORY** drop down list loaded. Seeded values are provided, but may not match your company's terminology.

6. Add, modify, or delete values for these Validations as you see fit. See the Validations chapter in *"Configuring a Request Resolution System"* or *"Configuring a Deployment System in Kintana"* for more details on modifying values for list Validations.

Setting Up Skills

Kintana Resource Management comes with a single "Unspecified" Skill, which all Resources have in the absence of any defined Skills. To make use of Resource Skill tracking, you need to add new Skills and modify them as you see fit.

Note

Only Kintana users with the Resource Management EDIT ALL SKILLS access grant can add or modify Skills.

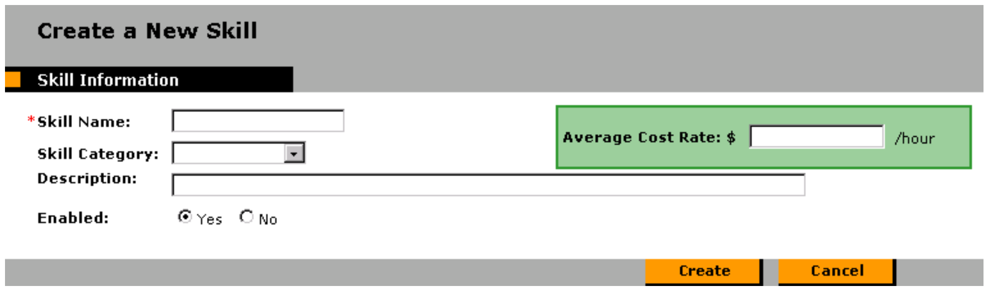
The following sections discuss setting up Skills in more detail:

- *Creating a New Skill*
- *Modifying Existing Skills*
- *Deleting Skills*

Creating a New Skill

To add a new Skill:

1. Log onto Kintana.
2. Select **CREATE -> SKILL** or **RESOURCE -> SKILLS -> CREATE A SKILL** from the navigation bar. The CREATE A NEW SKILL page opens.

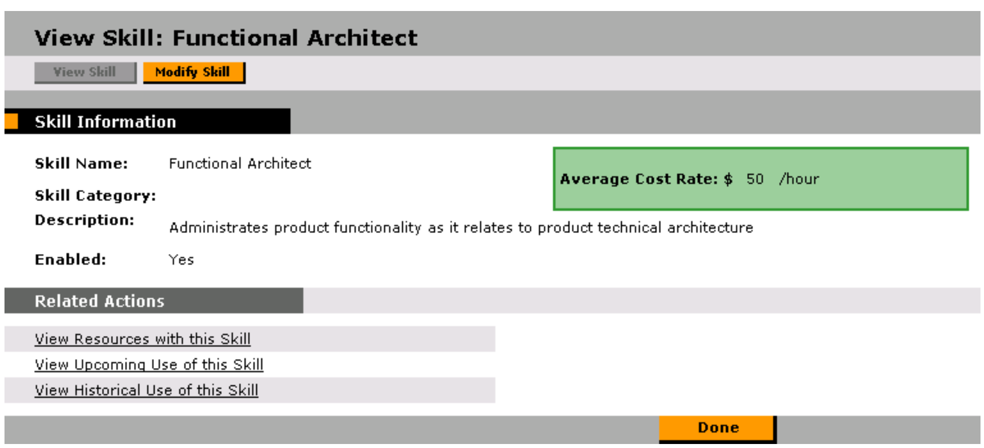


3. Enter a SKILL NAME and any optional fields you see fit.

Note

Depending on your level of Cost data access, you may not be able to see or edit the COST RATE field. See *"Kintana Security Model"* for details.

4. Click **CREATE**. The Skill is created and the VIEW SKILL page opens.

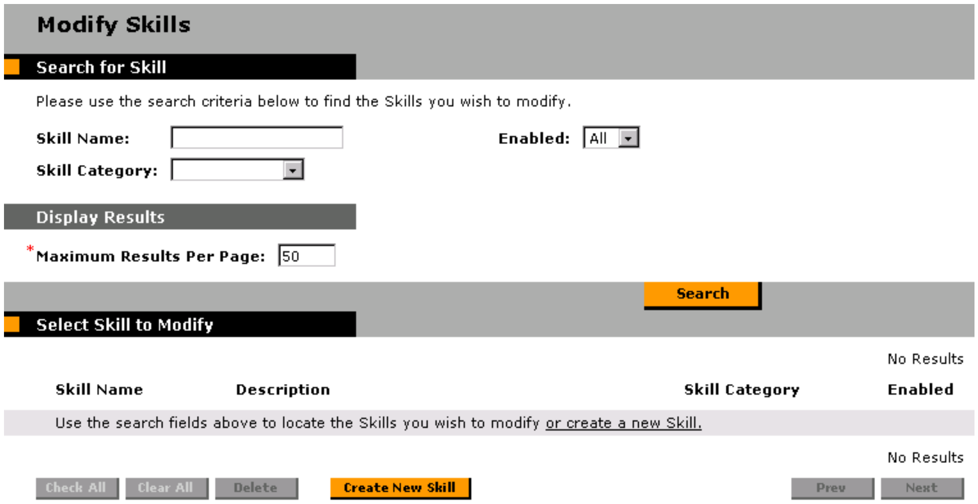


You can now add this Skill to any Resource.

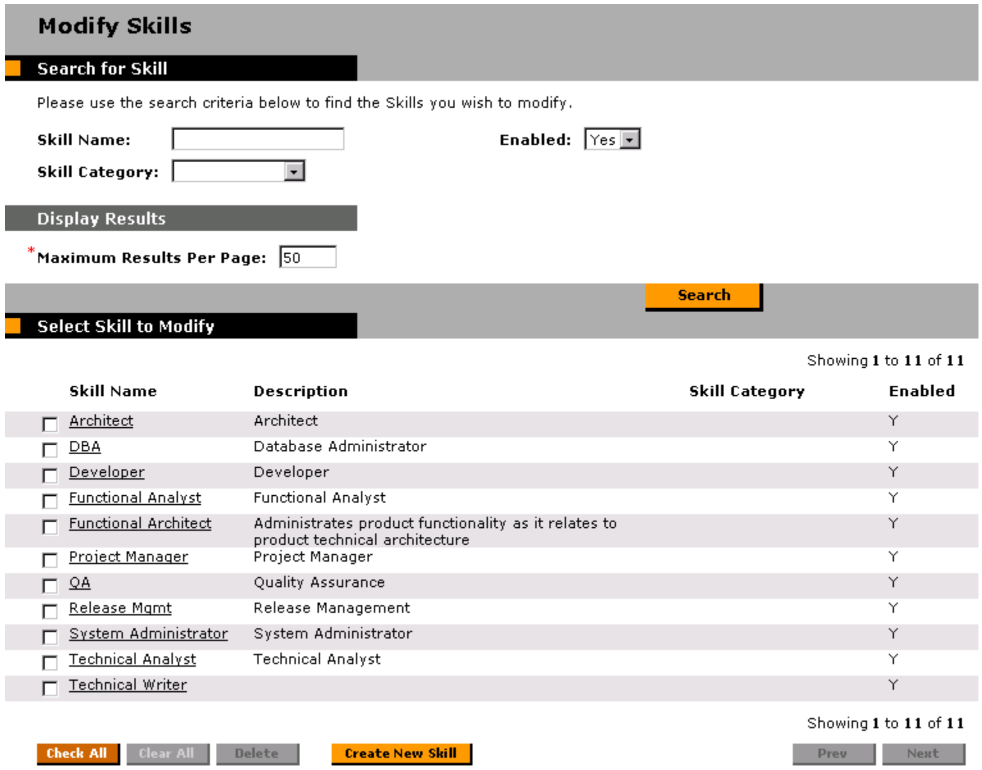
Modifying Existing Skills

To modify an existing Skill:

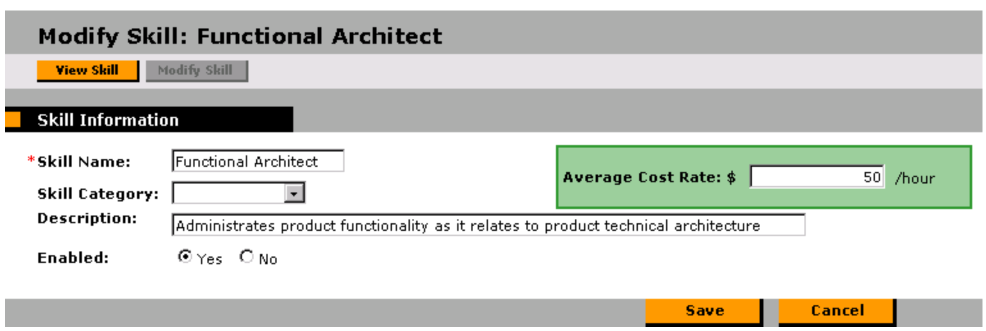
1. Log onto Kintana.
2. Select **RESOURCE -> SKILLS -> MODIFY A SKILL** from the navigation bar. The MODIFY SKILLS search page opens.



3. Enter any search criteria into the SEARCH FOR SKILL section and click **SEARCH**. The MODIFY SKILLS search page reopens, displaying the results of your search.



4. Click on a SKILL NAME to open its MODIFY SKILL page.



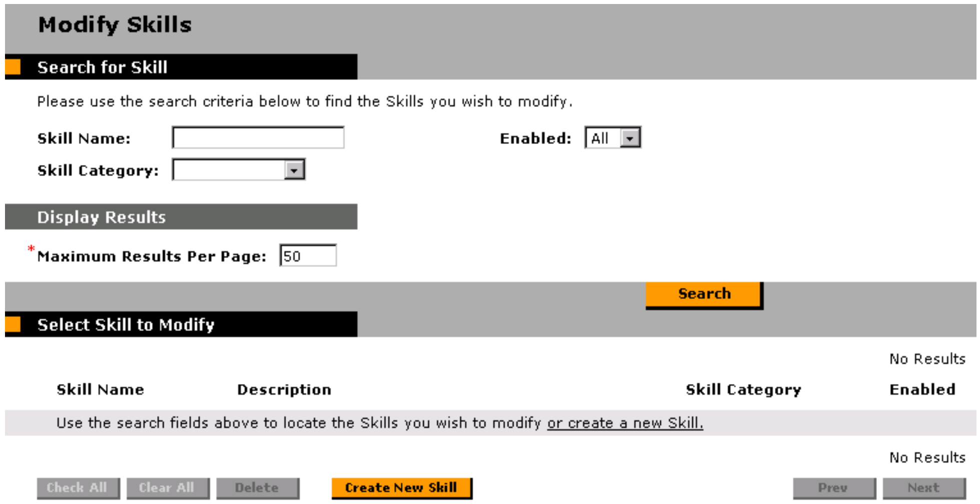
5. Make any necessary changes and click **SAVE**.

Deleting Skills

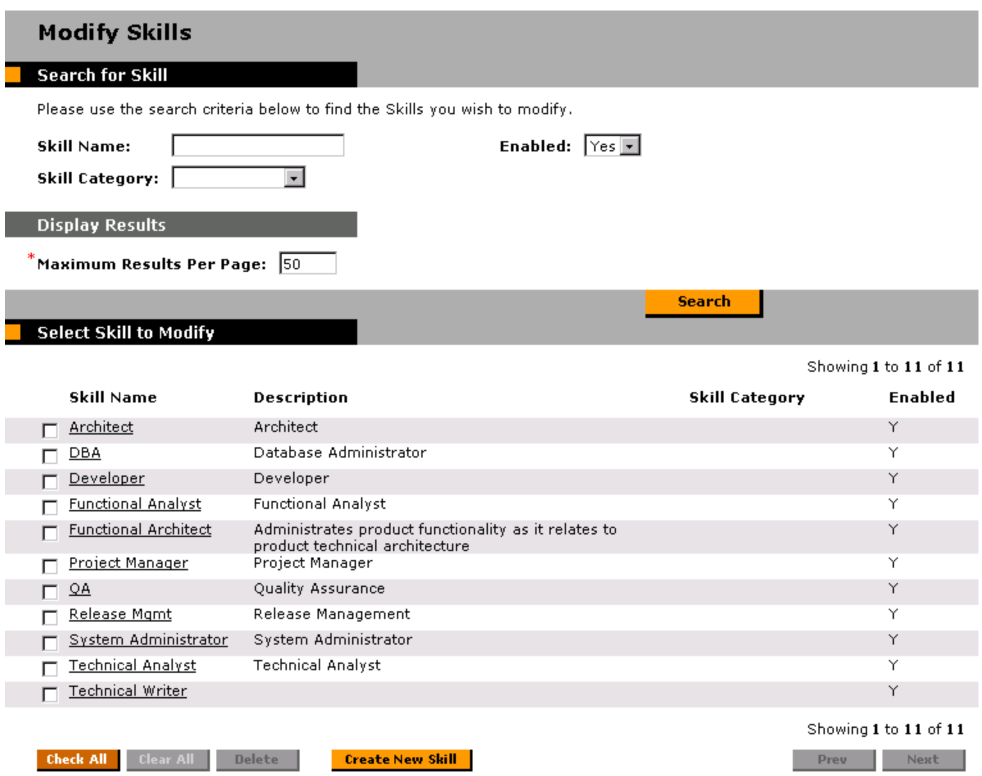
To delete a Skill:

1. Log onto Kintana.

2. Select **RESOURCE -> SKILLS -> MODIFY A SKILL** from the navigation bar. The MODIFY SKILLS search page opens.



3. Enter any search criteria into the SEARCH FOR SKILL section and click **SEARCH**. The MODIFY SKILLS search page reopens, displaying the results of your search.



4. Select the check box next to a Skill or Skills and click **DELETE**. The Skill is deleted. Skills possessed by Resources or used in historical Work Items cannot be deleted. These skills can be disabled.

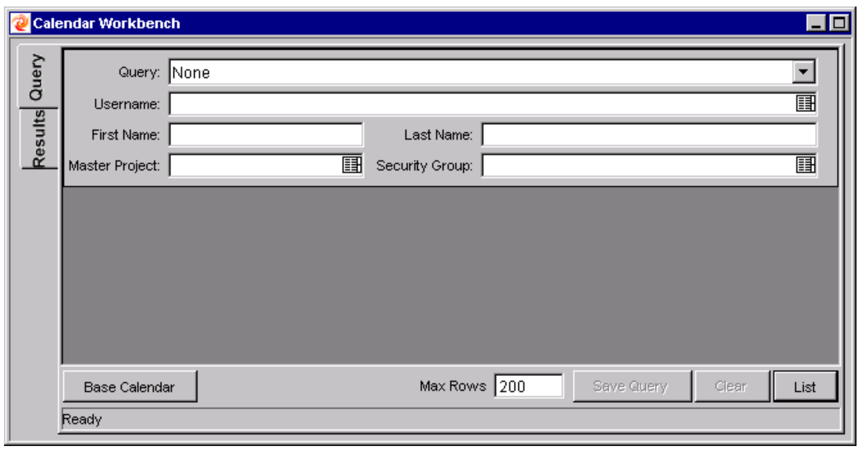
Setting Up the Base Calendar

To set up the base calendar for your company:

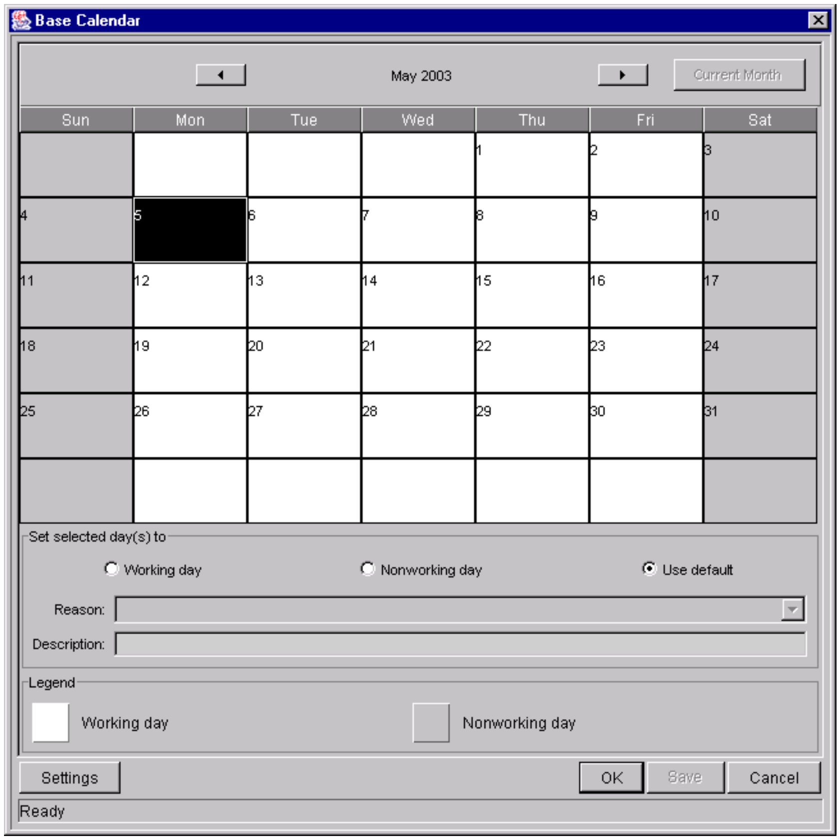
1. Log onto Kintana.

2. Open the Kintana Workbench interface by selecting **ADMINISTRATION -> OPEN KINTANA WORKBENCH.**

3. Click the **DRIVE** screen group and click the CALENDARS icon. The CALENDAR WORKBENCH opens.

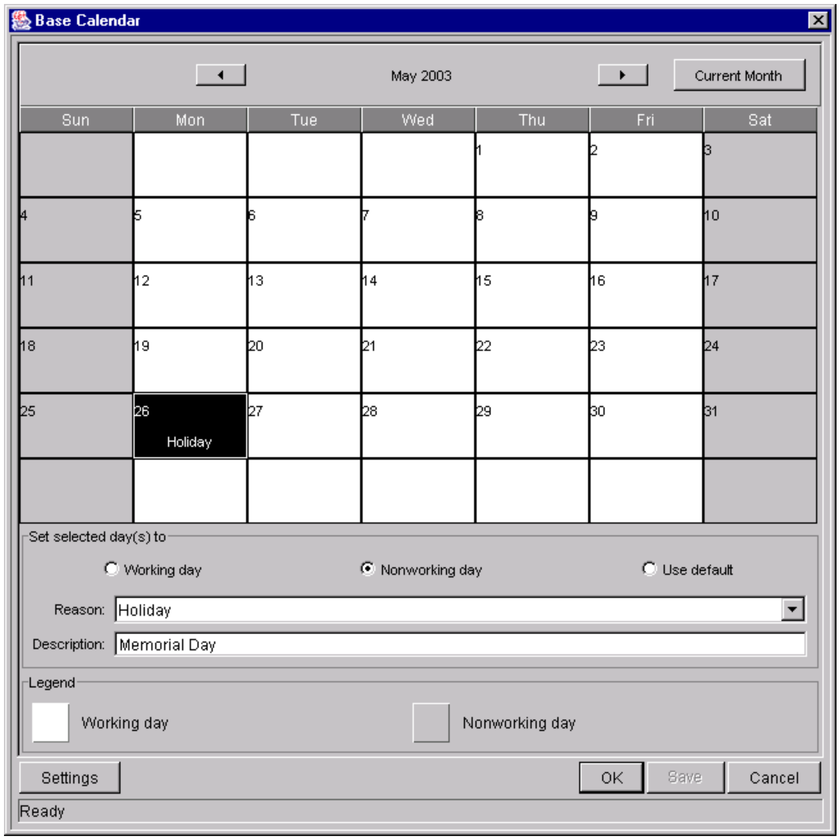


4. Click **BASE CALENDAR.** The BASE CALENDAR window opens.



5. To set a nonworking day, select a day or range of days by clicking and dragging and choose the NONWORKING DAY radio button.

   You can also select a REASON and enter a DESCRIPTION if you choose. Below is a Base Calendar with May 26 set as a nonworking holiday for the American holiday Memorial Day.



6. Click **Save**. The Base Calendar is set and will be used as the default for all Resources without a Calendar configured.

Note

By default, the Base Calendar considers all working days to be 10 hours in length. Though you can change this setting by clicking **Settings** in the Base Calendar window, this setting should have been set during your installation of Kintana Release 5.0. See the *"Kintana Upgrade Guide"* for more detailed information.

Setting Up Request Work Item Fields

If you have licenses for Kintana Create, and you wish to count Requests as Work Items to be tracked using Resource Management, you must include Work Item fields into your Request Types. Work Item fields include:

- Scheduled Start Date
- Scheduled Finish Date

- Scheduled Duration
- Scheduled Effort

To insert Work Item fields into a Request Type, you must associate the Work Item Field Group with the Request Header Type being used by the Request Type. *Figure 3-1* illustrates the relationship between the Work Item Field Group, a Request Header Type, and a Request Type.

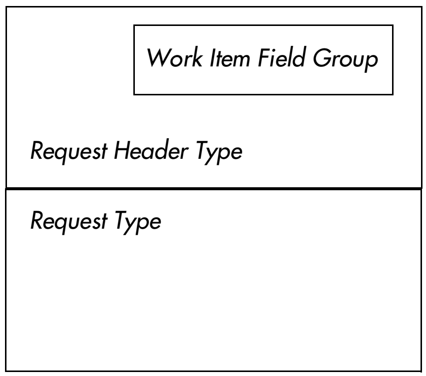


Figure 3-1 Work Item Field Group in a Request Type

Tip

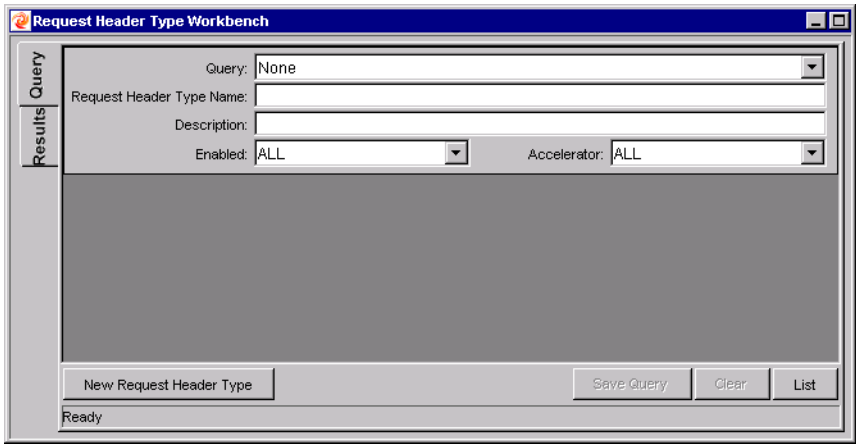
> To avoid associating Work Item fields with a Request you don't want to track, you may want to use a 1:1 Request Header Type:Request Type mapping.

Note

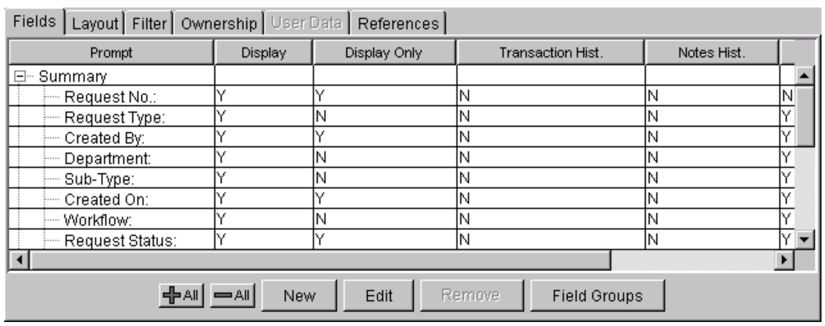
> When Field Groups are associated with existing Request Types (through the Request Header Type definition), tables in the Kintana database are updated to handle this new configuration. Because of the scope of database changes, you should re-run the Database Statistics on your Kintana Database. Instructions for this are included in the Kintana System Administration Guide. Contact your System Administrator for help with this procedure.

To associate Work Item fields with a Request Type:

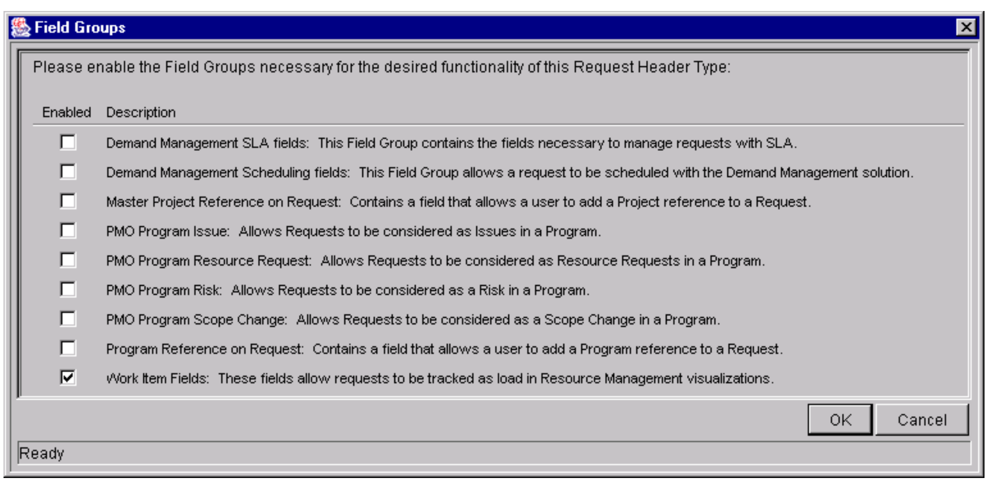
1. Log onto Kintana.
2. Open the Kintana Workbench.
3. Click the **CREATE** screen group and click the REQUEST HEADER TYPES screen. The REQUEST HEADER TYPE WORKBENCH opens.



4. Click **New Request Header Type**. The Request Header Type window opens to the **Fields** tab.



5. Click **Field Groups**. The Field Groups window opens.



Note

Depending on the Kintana Solutions your site has licensed, the Field Groups window may display a different set of options.

6. Select the Enabled check box for the Work Item Fields option and click **OK**.

   The Work Item fields are now associated with the Request Header Type.

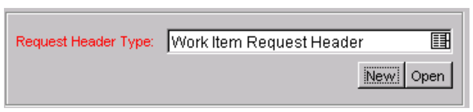
7. Enter any other required or optional information.

8. (optional) Modify other existing Request Header Type fields or create new ones as you see fit. See *"Configuring a Request Resolution System"* for more detailed information on modifying Request Header Type fields.

9. Save the Request Header Type.

10. Click the Request Types screen and open the Request Type in which you wish to include Work Item fields.

11. In the Request Header Type field, specify the Request Header Type containing the Work Item fields.



12. (optional) Modify the Request Type as you see fit, including setting field logic and security. See *"Configuring a Request Resolution System"* for more detailed information on modifying Request Type fields.

13. Save the Request Type.

    The Request Type now has Work Item fields associated with it and can be tracked using Kintana Resource Management.

Note

Certain Request Work Item fields are interdependent, meaning one field might be updated when another field's value is changed. Kintana Create field-level security allows you to make Request fields invisible to certain users or sets of users.

Resource Management for Requests may not work correctly if you make an interdependent Request Work Item field invisible to a user. Any user who will be making use of Request Work Item fields must have at least View access to all of them. Edit access to all Work Item fields is not necessary unless the user will be changing Work Item field values.

Chapter 4
Modeling Your Organization

In order to use Kintana Resource Management, you must first define your Resources. Resources can have many attributes, including:

- First and last name
- Phone number
- Email address
- Direct manager
- Cost rate
- Capacity
- Department
- Skills

Table 4-1 describes Resource attributes that are especially useful. To take full advantage of Resource Management functionality, these attributes should be defined for every Resource.

Table 4-1. Key Resource Attributes

Attribute	Utilization
COST RATE	Used to calculate Project and Task costs. ex. Cost Rate * Hours Worked = Task Actual Cost See *"Working with Projects"* (Cost chapter) for more detailed information.
CAPACITY	Used to calculate Resource capacity for Work Items. See *"Visualizing Assignments"* on page 102 for more detailed information.

Table 4-1. Key Resource Attributes

Attribute	Utilization
SKILLS	Used in Resource booking and to build Staffing Profiles and Resource Pools. See *“Using Resource Management for Capacity Planning”* on page 57 for more detailed information.

The following sections discuss setting up Resources and modeling your Organization in more detail:

- *Setting Up a Resource*
- *Modeling Organization Units*

Setting Up a Resource

Resources map to Kintana users on a 1:1 basis.

Note

A new Resource cannot be created from scratch. A new Kintana user must be defined, and then his or her Resource attributes subsequently configured.

While Kintana users are created and maintained from the Kintana Workbench, Resource information is set in the Kintana interface.

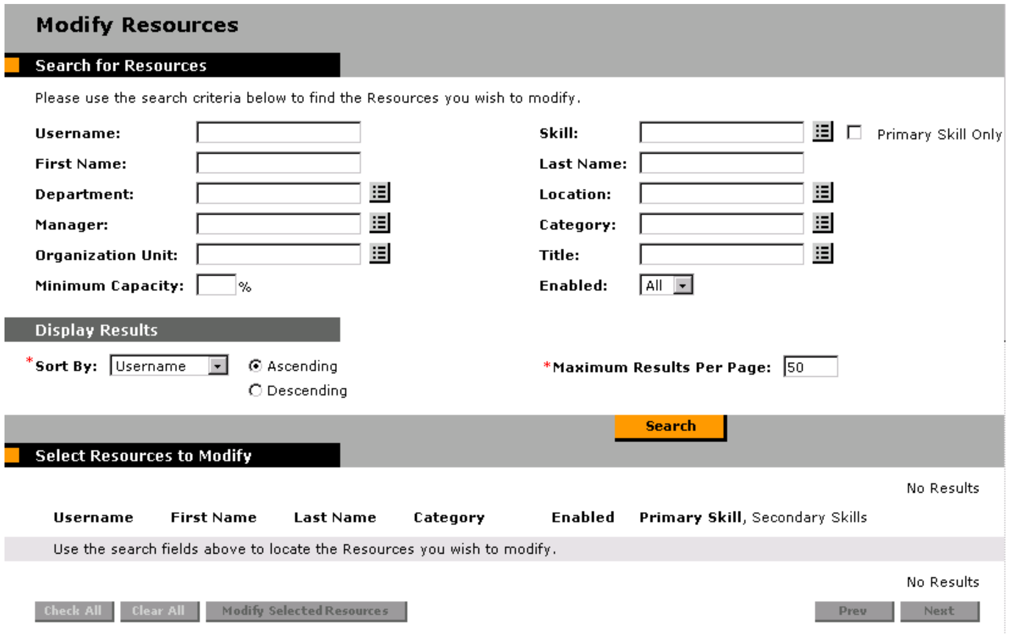
The following sections discuss Resource setup in more detail:

- *Setting Resource Attributes*
- *Setting Up the Resource Calendar*
- *Resource Security*

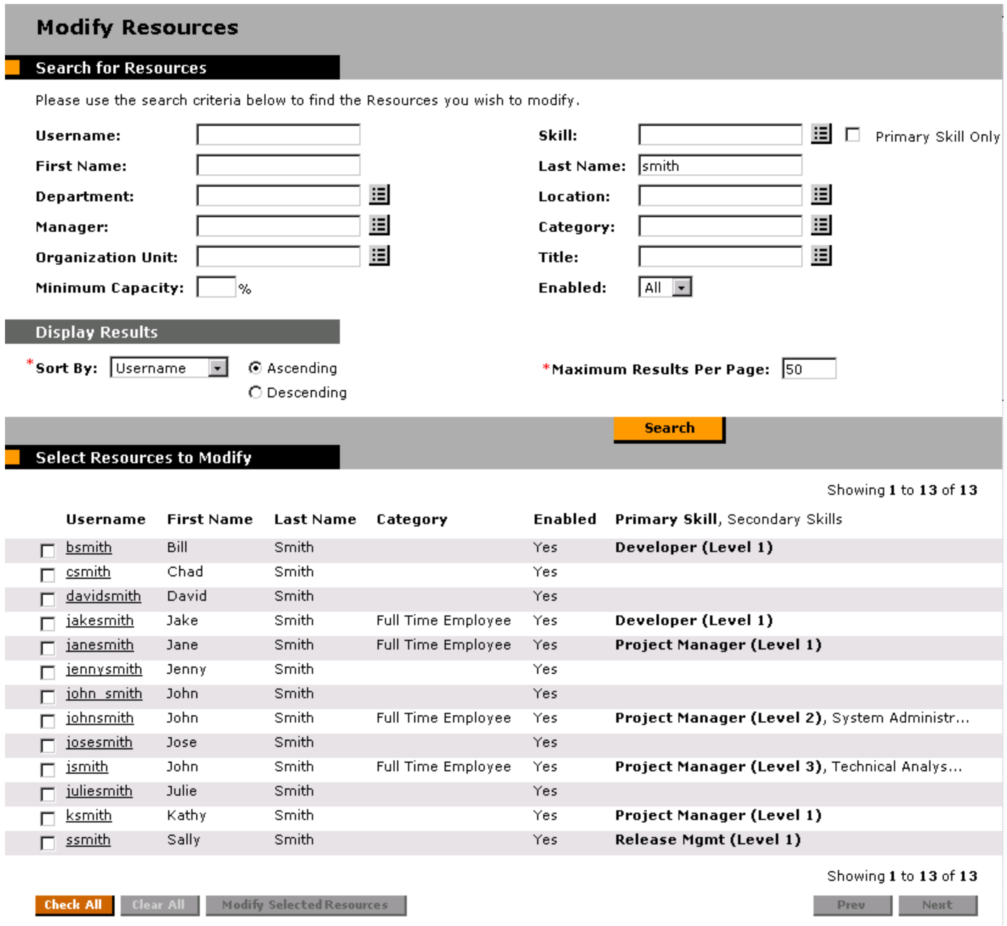
Setting Resource Attributes

General Resource attributes are set in the Kintana interface. To configure attributes for a Resource:

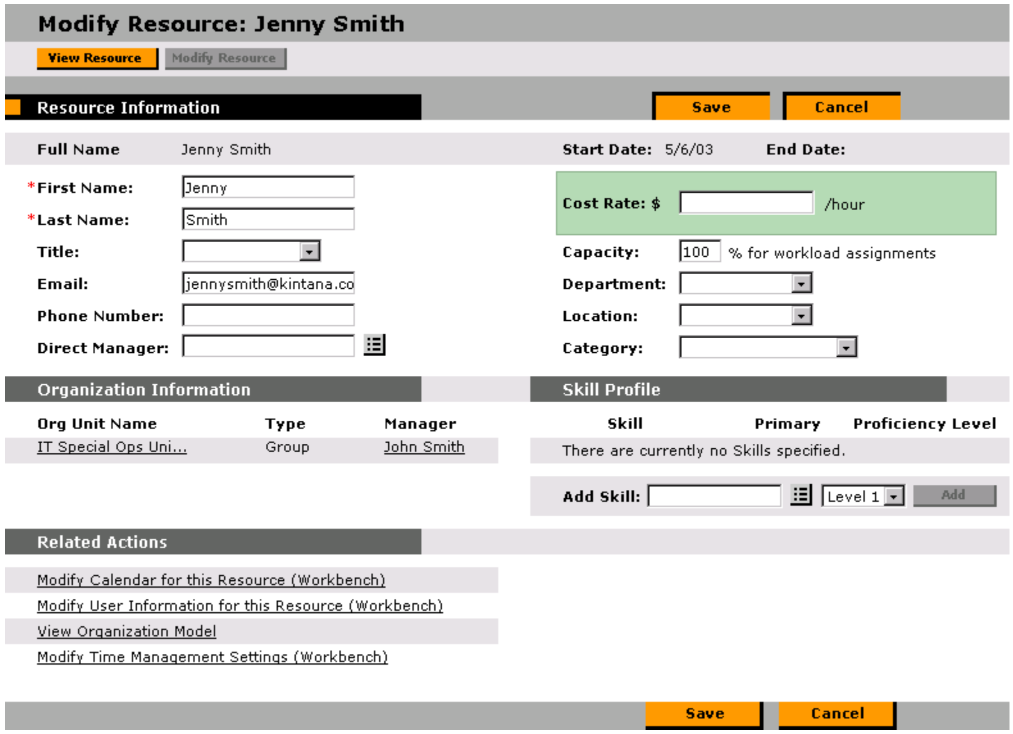
1. Log onto Kintana.
2. Select **RESOURCE -> RESOURCES -> MODIFY RESOURCE** from the navigation bar. The MODIFY RESOURCES search page opens.



3. Enter any search criteria into the SEARCH FOR RESOURCES section and click **SEARCH**. The MODIFY RESOURCES search page refreshes, displaying the results of your search.



4. Click on a Resource’s USERNAME to open their MODIFY RESOURCE page.



5. Fill in any desired Resource attributes.

Note

> Depending on your level of Cost data access, you may not be able to see or edit the Cost Rate field.

To add a Skill:

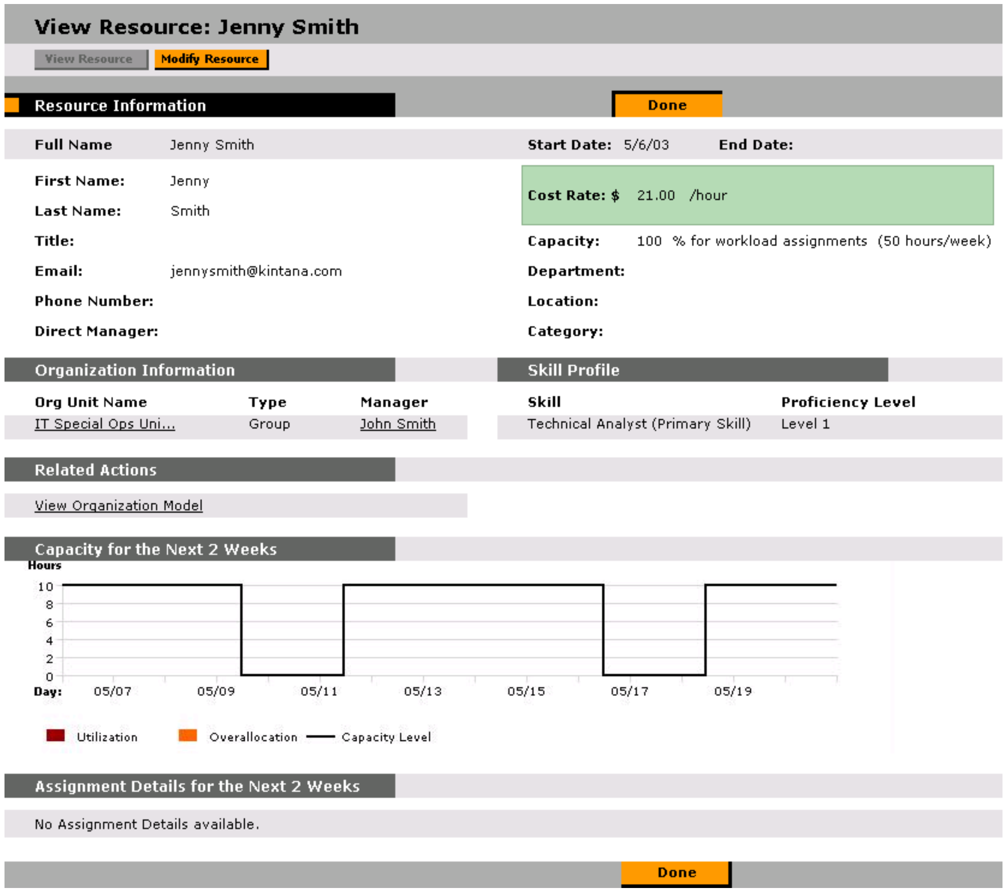
a. Select one from the Add Skill auto-complete list.

b. Select a proficiency level from the drop down list.

c. Click **Add**. The Skill will be associated with the Resource upon save.

   To add more Skills, repeat as necessary.

6. Click **Save** to save all changes to the Resource. The View Resource page opens, displaying the Resource's new information.



Setting Up the Resource Calendar

A Resource's Calendar, which specifies working and non-working days for that particular Resource, is configured in the Kintana Workbench. To set a Resource's Calendar:

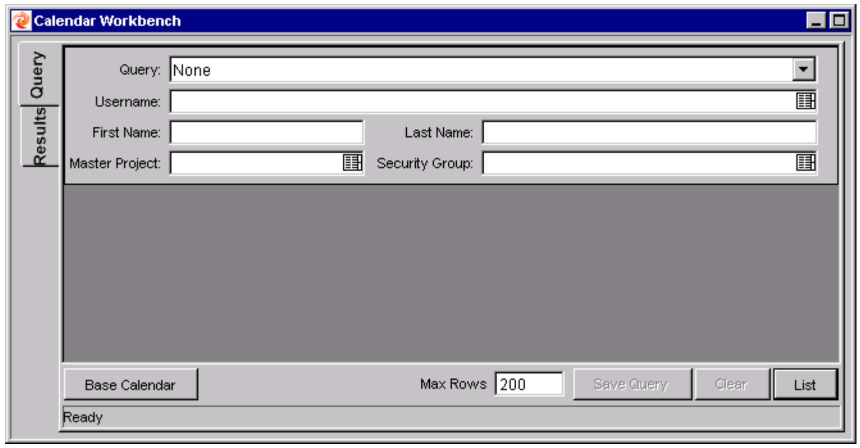
1. Open the Resource's Calendar by clicking the MODIFY CALENDAR FOR THIS RESOURCE (WORKBENCH) link on the MODIFY RESOURCE page.

   Or:

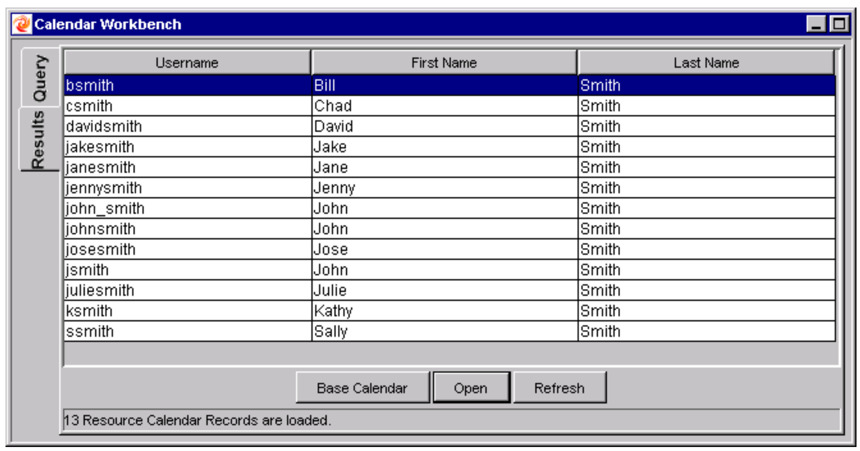
   a. Log onto Kintana.

   b. Open the Kintana Workbench.

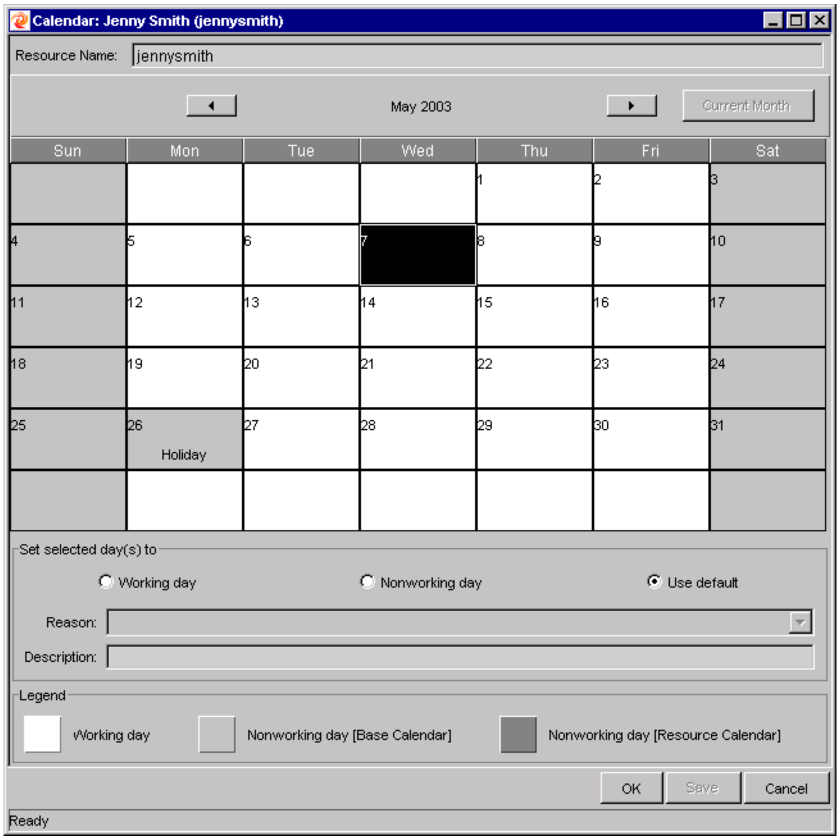
   c. Click the **DRIVE** screen group and click the CALENDARS icon. The CALENDAR WORKBENCH opens.



d. Enter any search criteria to locate the user and click **List**. The **Results** tab opens, displaying the results of your search.

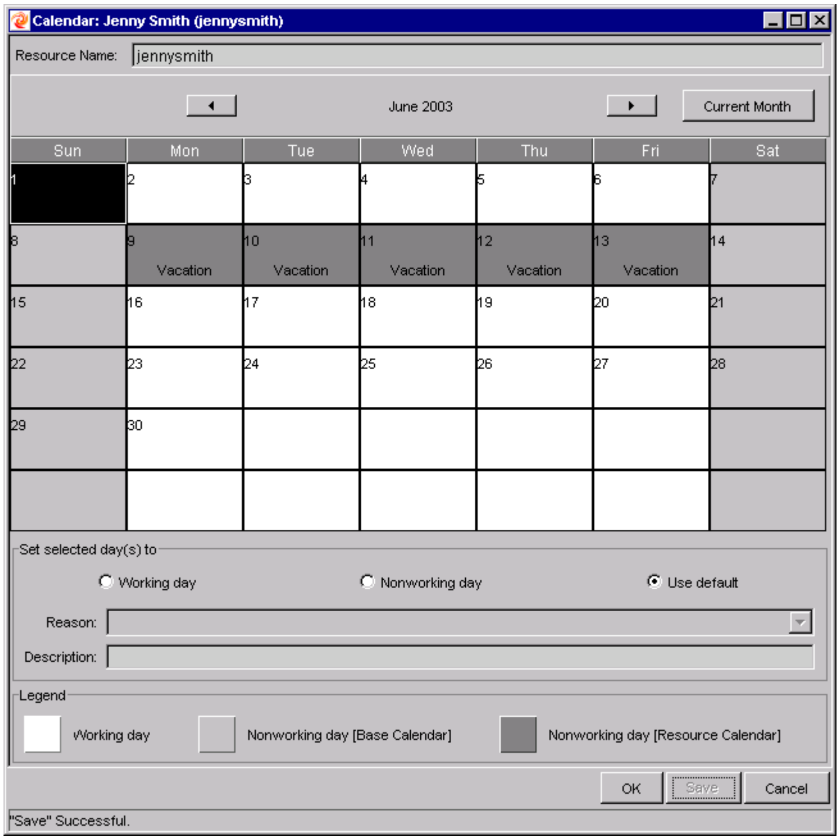


e. Double-click the name of the Resource whose Calendar you wish to configure. The Resource's Calendar window opens.



2. To set a nonworking day, select a day or range of days by clicking and dragging and choose the NONWORKING DAY radio button.

   You can also select a REASON and enter a DESCRIPTION if you choose. Below is the Calendar for a Resource who is taking a vacation during the second week of June.



3. Click **SAVE**. The Resource's Calendar is set and will be used to calculate that Resource's Capacity in Resource Management visualizations.

Resource Security

Resource information can have various layers of security applied to it. Depending on the Access Grants a user has, that user can view his own Resource information, view information on other Resources, edit information for Resources he manages, or edit all Resources in the system. These Access Grants are also needed to use the ANALYZE ASSIGNMENT LOAD visualizations. *Table 4-2* describes these Access Grants in more detail.

Table 4-2. Resource Information Access Grants

Access Grant	Description
VIEW MY OWN PERSONAL RESOURCE INFO ONLY	The user can only view their own Resource information.
VIEW ALL RESOURCES	The user can only view information for all Resources in Kintana.

Table 4-2. Resource Information Access Grants

Access Grant	Description
EDIT ONLY RESOURCES THAT I MANAGE	The user can view and edit information for Resources that list them as DIRECT MANAGER.
EDIT ALL RESOURCES	The user can view and edit information for all Resources in Kintana.

Cost Access Grants also come into play when a user is viewing Resource data: the COST RATE can be sensitive information. *Table 4-3* discusses the interaction of Cost Access Grants with Resource viewing.

Table 4-3. Cost Access Grants and Resource Information

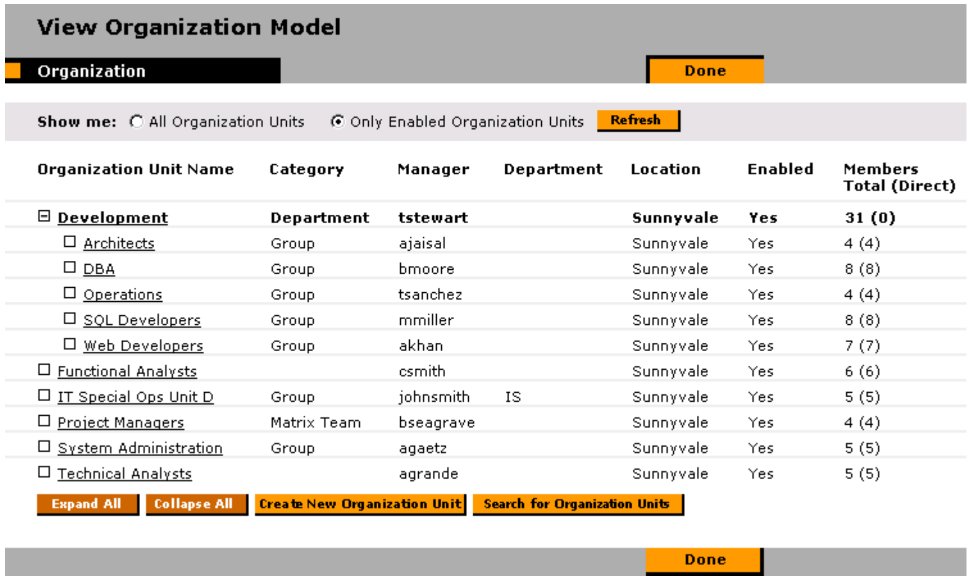
Access Grant	Description
VIEW COST DATA	The user can view a Resource's COST RATE, but cannot edit it, even from the MODIFY RESOURCE page.
EDIT COST DATA	The user can view a Resource's COST RATE and change it from the MODIFY RESOURCE page.
(NONE)	The COST RATE field is not displayed to the user.

Access Grants are linked to a user via the Security Groups they are part of. For more information on user security, see *"Kintana Security Model"*.

Modeling Organization Units

Resources can be members of Organization Units, which can stand on their own or be arranged in relation to one another to form an Organization Model. *Figure 4-1* illustrates an Organization Model with several independent Organization Units, plus one large Development Unit made up of child Org Units.

The Organization Model is visible at all times from the VIEW ORGANIZATION MODEL page. To open this page, select **RESOURCE -> ORGANIZATION MODEL -> BROWSE THE ORG MODEL** from the navigation bar.



View Organization Model

Organization Done

Show me: ○ All Organization Units ◉ Only Enabled Organization Units Refresh

Organization Unit Name	Category	Manager	Department	Location	Enabled	Members Total (Direct)
Development	**Department**	**tstewart**		**Sunnyvale**	**Yes**	**31 (0)**
Architects	Group	ajaisal		Sunnyvale	Yes	4 (4)
DBA	Group	bmoore		Sunnyvale	Yes	8 (8)
Operations	Group	tsanchez		Sunnyvale	Yes	4 (4)
SQL Developers	Group	mmiller		Sunnyvale	Yes	8 (8)
Web Developers	Group	akhan		Sunnyvale	Yes	7 (7)
Functional Analysts		csmith		Sunnyvale	Yes	6 (6)
IT Special Ops Unit D	Group	johnsmith	IS	Sunnyvale	Yes	5 (5)
Project Managers	Matrix Team	bseagrave		Sunnyvale	Yes	4 (4)
System Administration	Group	agaetz		Sunnyvale	Yes	5 (5)
Technical Analysts		agrande		Sunnyvale	Yes	5 (5)

Expand All | Collapse All | Create New Organization Unit | Search for Organization Units

Done

Figure 4-1 Sample Organization Model

Organization Units can have Budgets, Staffing Profiles, and Resource Pools associated with them, making it easy to run comparisons. *Figure 4-2* depicts a portlet comparing the Budget for an entire IT Organization Unit with three Project Budgets owned by its members. We can see that during almost every month, the combined Budgets for these Projects exceeds the Organization Unit's, in some cases by a wide margin.

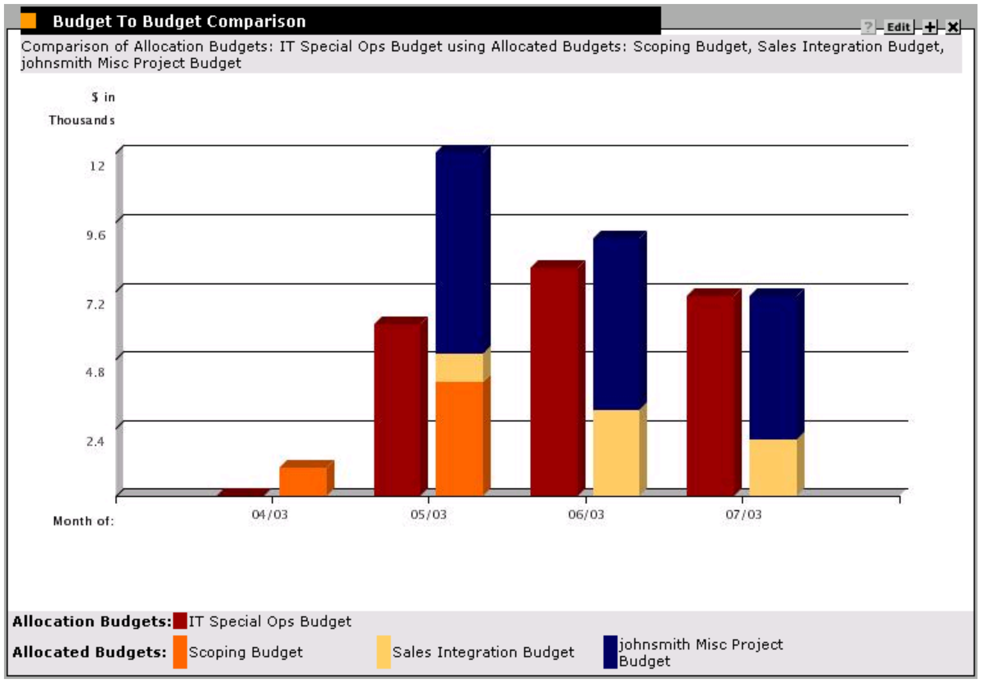


Figure 4-2 Budget to Budget Comparison portlet showing Organization Unit Budget against three Project Budgets

You can also show the assignment load for all Resources in an Organization Unit with the ANALYZE ASSIGNMENT LOAD page. *Figure 4-3* shows the ANALYZE ASSIGNMENT LOAD page for an Organization Unit whose members are currently under-utilized. The total capacity for the Organization Unit is calculated from each Resource's Calendar and Workload Capacity.

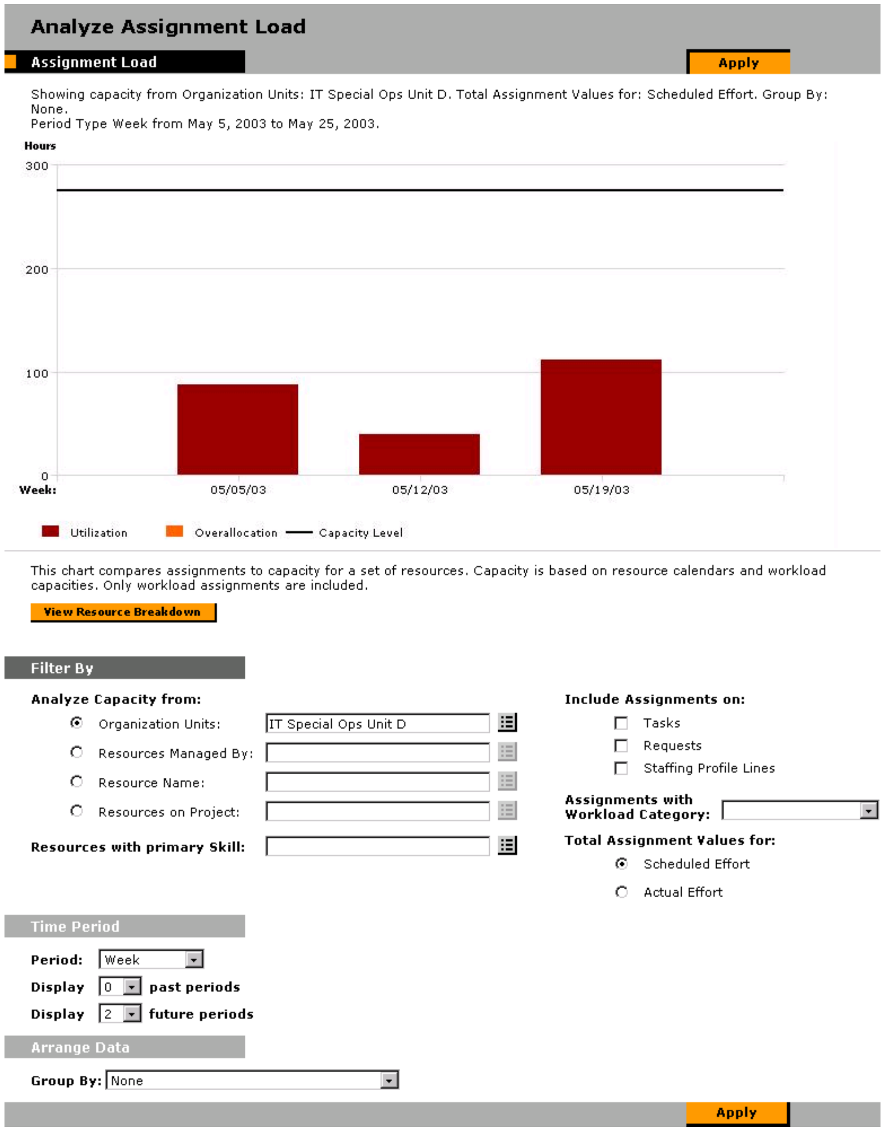


Figure 4-3 Analyze Assignment Load page

The following sections discuss Organization Units in more detail:

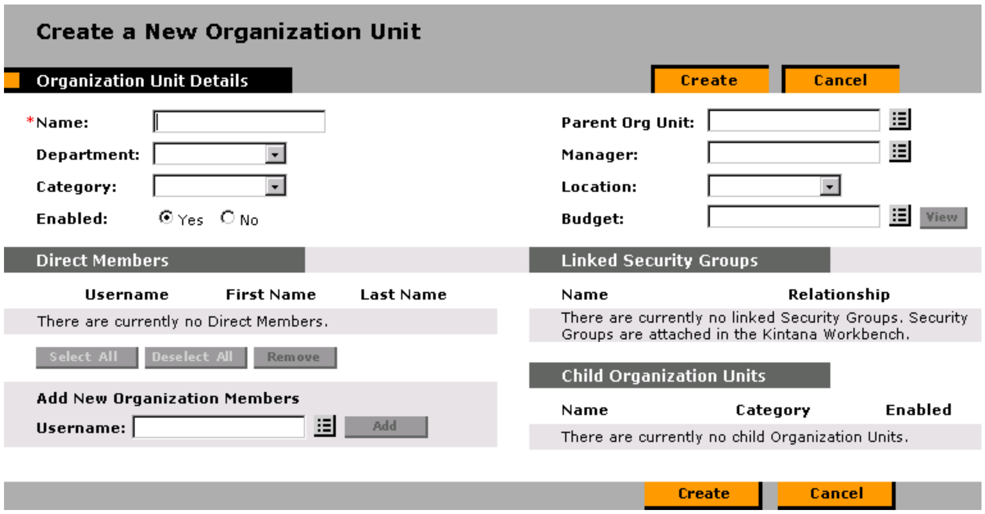
- *Creating an Organization Unit*
- *Building the Organization Model*
- *Linking Organization Units to Security Groups*

Creating an Organization Unit

To create an Organization Unit:

1. Log onto Kintana.

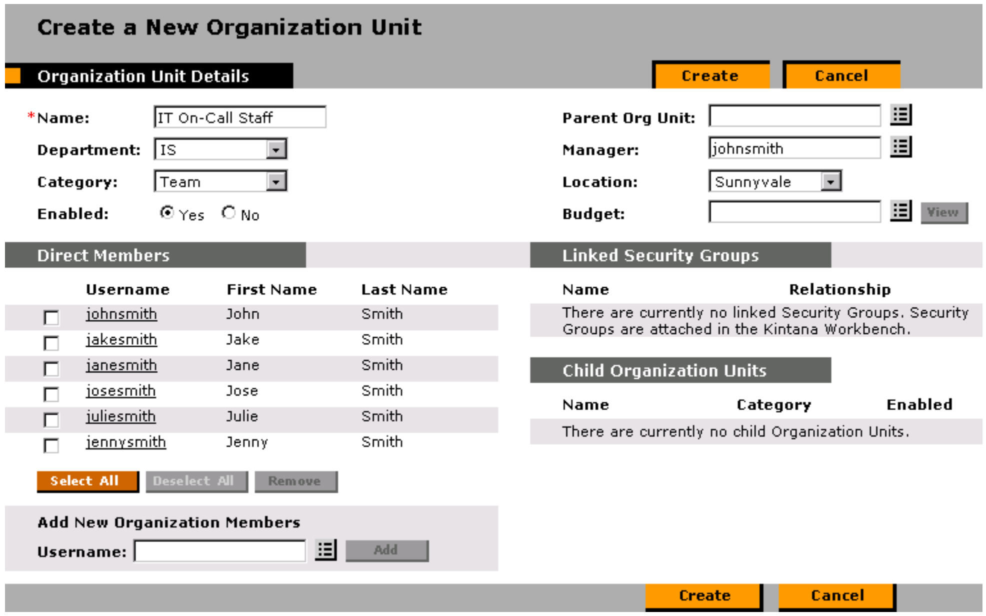
2. Select **Create -> Organization Unit** or **Resource -> Organization Model -> Create an Org Unit** from the navigation bar. The Create a New Organization Unit page opens.



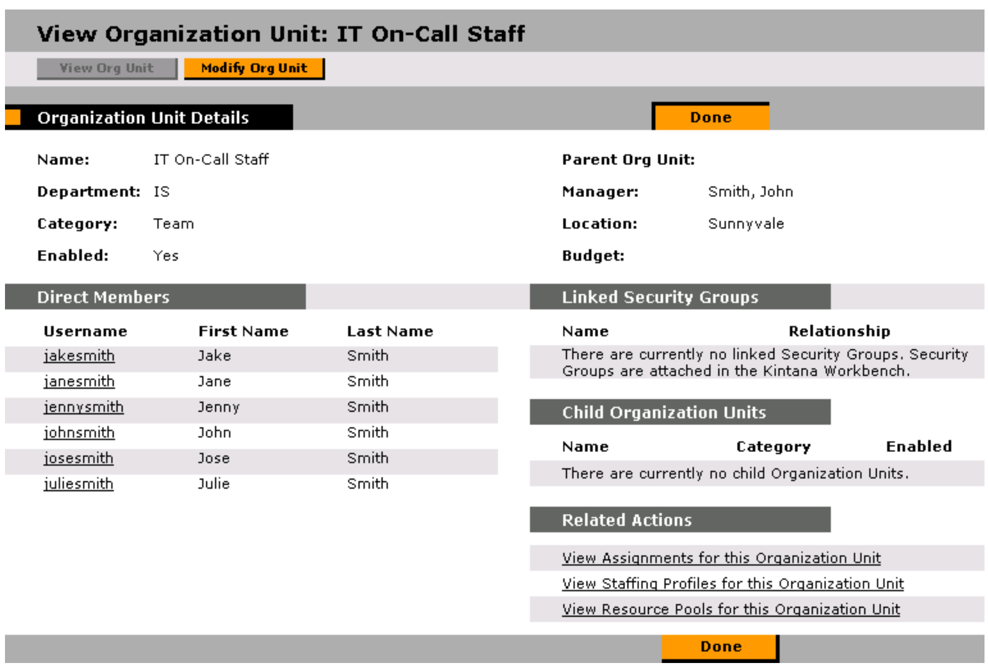
3. Fill in the Organization Unit Name and any other desired information.

4. Add users to the Organization Unit by selecting a user from the Username multi-select auto-complete list and clicking **Add**.

   The Create a New Organization Unit page reloads with the selected users displayed in the Direct Members list.



5. Click **CREATE** to create the Organization Unit. The VIEW ORGANIZATION UNIT page opens, displaying the newly-created Organization Unit.

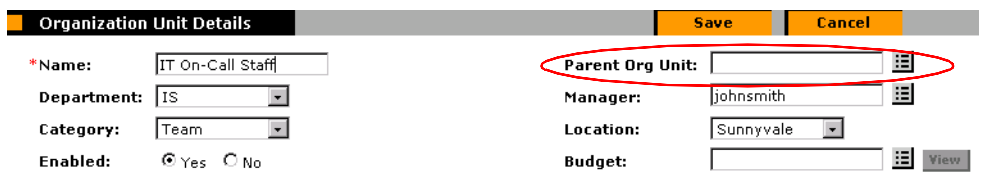


Building the Organization Model

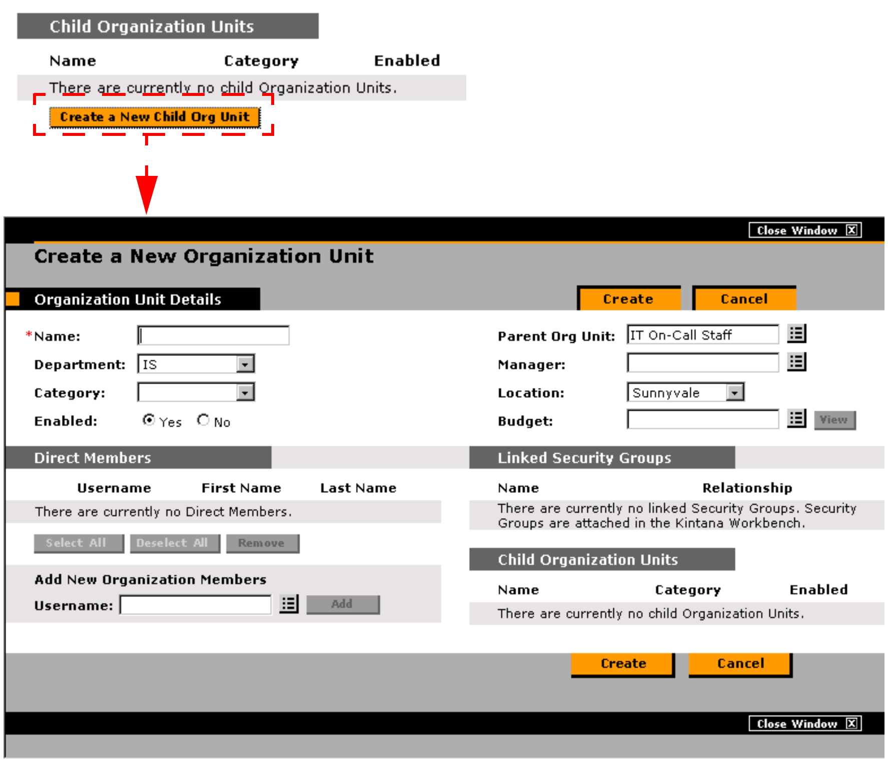
The Organization Model is a hierarchy of Organization Units. *Figure 4-4* illustrates the terms used by Kintana when defining the Organization Model.

Figure 4-4 Organization Model Hierarchy Terms

An Organization Unit's Parent is defined from its MODIFY or CREATE A NEW ORGANIZATION UNIT page. Use the PARENT ORG UNIT field in the ORGANIZATION UNIT DETAILS section to set the Organization Unit's parent.



The MODIFY ORGANIZATION UNIT page also allows you to create a new child Organization Unit. Click **CREATE A NEW CHILD ORG UNIT** to create a new child Organization Unit in a new window.



You can also select an Organization Unit in the VIEW ORGANIZATION MODEL page and click **CREATE NEW CHILD ORGANIZATION UNIT**.

To reach an Organization Unit's MODIFY ORGANIZATION UNIT page:

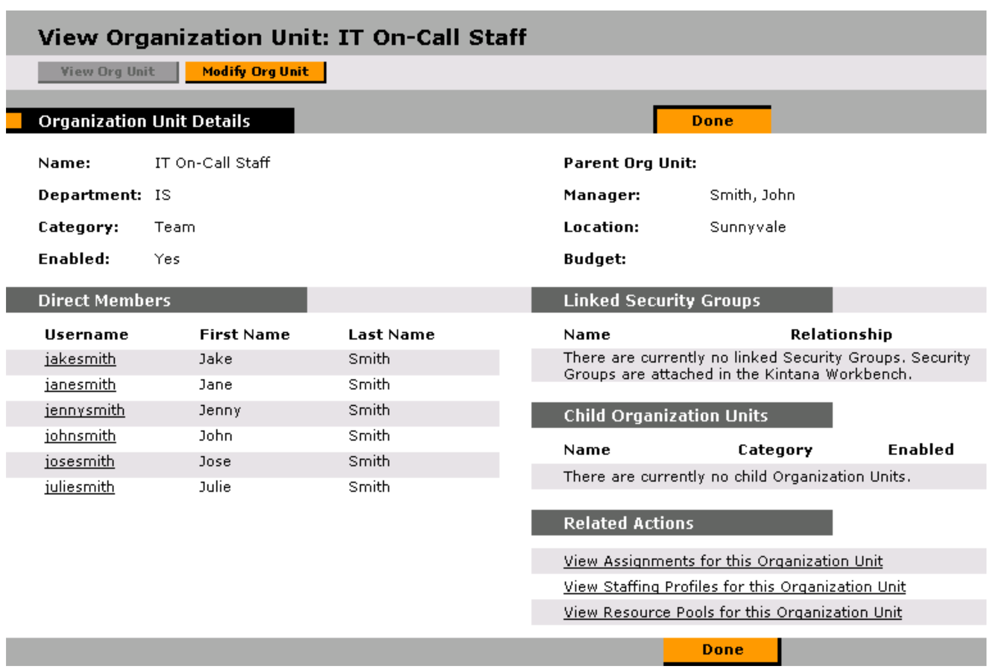
1. Log onto Kintana.

2. Search for the Organization Unit by selecting **SEARCH -> ORGANIZATION UNITS** or **RESOURCE -> ORGANIZATION MODEL -> MODIFY ORG UNITS** from the navigation bar.

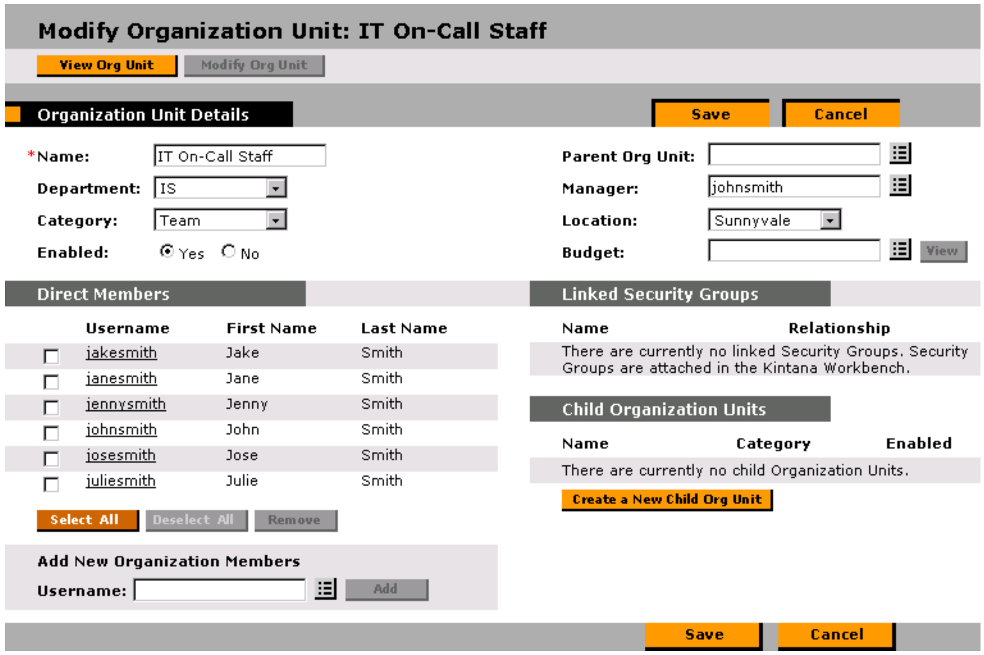
   or

   Select **RESOURCE -> ORGANIZATION MODEL -> BROWSE THE ORG MODEL** from the navigation bar.

3. Click the name of the Organization Unit you wish to modify. The VIEW ORGANIZATION UNIT page opens.



4. Click **MODIFY ORG UNIT**. The MODIFY ORGANIZATION UNIT page opens.



Linking Organization Units to Security Groups

Security Groups in Kintana can be linked to Organization Units. This can allow your Kintana security configuration to more accurately reflect your business needs, as well as supply a more convenient and intuitive way of adding or removing security from users by associating or dissociating them from Organization Units. Doing so also distributes the maintenance of Security Groups from Kintana Administrators to business users who actually manage Organization Units.

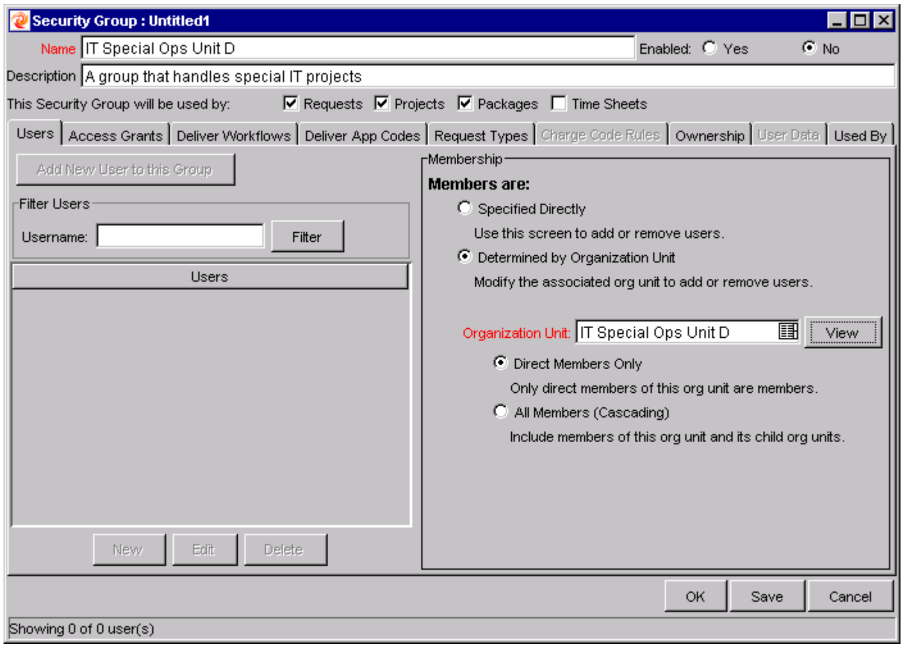


Figure 4-5 Security Group window showing Security Group membership determined by an Organization Unit's direct members

With Resource Management, Security Group membership can be determined in the following ways:

- **SPECIFIED DIRECTLY** — Security Group members are specified in the **USERS** tab of the SECURITY GROUP window in the Kintana Workbench interface. This method does not take the Organization Model into account.
- **DETERMINED BY ORGANIZATION UNIT** — The Security Group's member list is determined by the Organization Unit to which it is linked. An Organization Unit must be specified for this method to be used.

Note

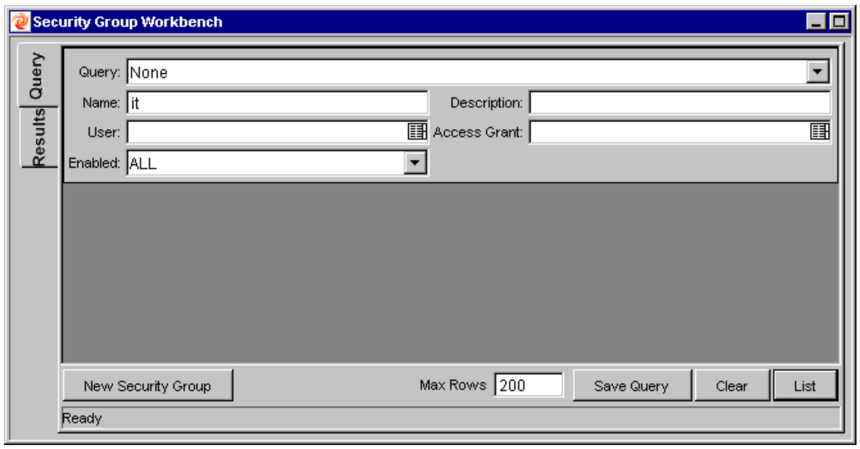
When a Security Group's members are determined by an Organization Unit, the Organization Unit's member list over-writes that of the Security Group.

If a Security Group's members are determined by its Organization Unit, an additional level of control is added:

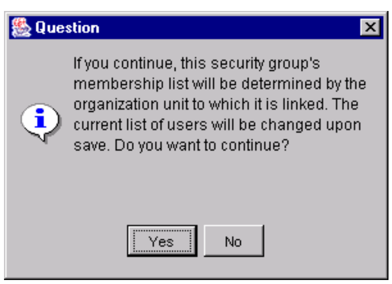
- **DIRECT MEMBERS ONLY** — Only the direct members of the Organization Unit are part of the Security Group.
- **ALL MEMBERS (CASCADING)** — The direct members of the Organization Unit and all the members of all its child Organization Units are part of the Security Group.

To link a Security Group to an Organization Unit:

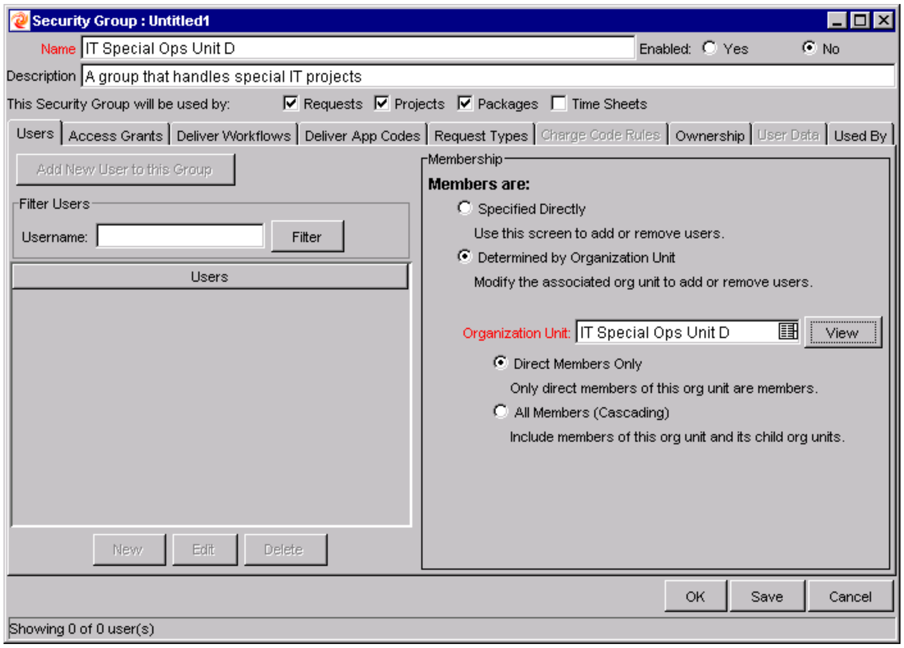
1. Log onto Kintana.
2. Open the Kintana Workbench.
3. Click the **SYS ADMIN** screen group and the SECURITY GROUPS icon. The SECURITY GROUP WORKBENCH opens.



4. Create a new Security Group or search for and open an existing one. The SECURITY GROUP window opens.
5. In the **USERS** tab, select the DETERMINED BY ORGANIZATION UNIT radio button. A question dialog opens, warning you that the Security Group's present member list will be overridden by the current members of the Organization Unit. Click **YES** to continue.



6. The ORGANIZATION UNIT auto-complete field becomes enabled and required.
7. Select an Organization Unit to be linked to the Security Group.
8. Specify either DIRECT MEMBERS ONLY or ALL MEMBERS (CASCADING) for the Security Group's member list.



9. Click **Save**. You will see the new list of members for the Security Group.

Chapter

5

Using Resource Management for Capacity Planning

Kintana Resource Management can be used for Resource capacity planning. Resource capacity planning in Kintana can consist of the following activities:

- Gauging present Resource capacity and workload
- Predicting future Resource capacity in terms of needed Skills or Resources
- Forecasting future Resource demand in terms of needed Skills or Resources
- Viewing historical trends in Resource allocation
- Comparing present Resource usage to previous forecasts

There are two basic tools provided by Kintana to help in Resource capacity planning:

- **Resource Pools** — Resource Pools provide a way to track the forecast Resource capacity, broken down by Skill. This lets the manager see what Resources and Skills they will have on-hand to apply to future work.
- **Staffing Profiles** — Staffing Profiles allow a manager to plan the future allocation of Resources, broken down by Skill. This lets the user see what kinds of Resources and Skills they will need for future work.

The following sections discuss using Resource Pools, Staffing Profiles, and related visualizations to help in Resource capacity planning:

- *Planning Capacity with Resource Pools*
- *Tracking Demand with Staffing Profiles*
- *Analyzing Resource Pools*
- *Analyzing Staffing Profiles*

Planning Capacity with Resource Pools

Resource Pools enable Resource planners to designate future Resource capacity, arranged by Skill, on a monthly basis. Program and Project managers can then build Staffing Profiles that draw from a Resource Pool, and use visualizations to assess whether proposed Projects or Programs are within capacity bounds outlined by the Resource Pool. A Resource Pool is broken down across monthly segments, with each line specifying the "full-time equivalent" (FTE) capacity for a Skill, and optionally for a Resource that possesses the Skill. Resource Pools can be associated with Organization Units or Programs, linking them with their role in the business. *Table 5-1* describes the key attributes of a Resource Pool:

Table 5-1. Resource Pool Attributes

Field	Description
Resource Pool Information	
POOL STATUS	The status of the Resource Pool. Possible values: **NEW**, **PROPOSED**, **UNDER REVIEW**, **IN REWORK**, **ON HOLD**, **APPROVED**, **REJECTED**, **CANCELLED**, **CLOSED**
ACTIVE	Whether or not the Resource Pool is active. Inactive Resource Pools are not included in Resource Management visualizations.
NAME	The name of the Resource Pool.
CREATED ON	The date the Resource Pool was created.
CREATED BY	The user who created the Resource Pool.
DESCRIPTION	A description of the Resource Pool.
THIS RESOURCE POOL IS FOR	Defines whether the Resource Pool is associated with an ORGANIZATION UNIT, a PROGRAM (if Kintana PMO Solution is installed), or UNSPECIFIED.
START PERIOD	The starting period (a fiscal month) for the Resource Pool.
FINISH PERIOD	The ending period (a fiscal month) for the Resource Pool.
Resource Pool Breakdown	
SKILL	The Skill being planned. Each Resource Pool line can hold one Skill.
RESOURCE	The Resource for the Skill. Each Resource Pool line can hold one Resource.
TOTAL FTE'S FOR MONTH	The total Full Time Equivalents for each month being planned in the Resource Pool.

Table 5-1. Resource Pool Attributes

Field	Description
AVERAGE FTE'S FOR QUARTER	The average Full Time Equivalents per quarter being planned in the Resource Pool.
NOTES	Any notes on the Resource Pool itself.

Figure 5-1 depicts a Resource Pool containing four different Skills and their Full-Time Equivalents for the months of June through August.

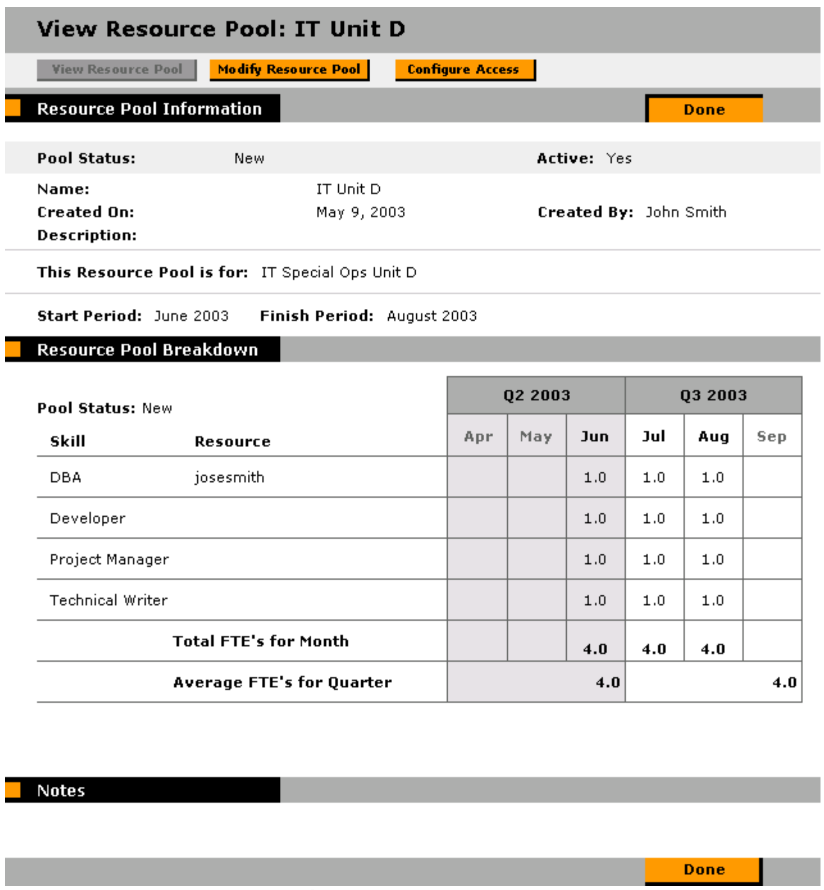


Figure 5-1 Resource Pool

Each Skill has an even FTE of 1, meaning one person with the specified Skill will be fully available during that fiscal month (or the equivalent, such as two people available at 1/2 time each).

In this Resource Pool, there is only one Skill with a Resource attached; "josesmith" is specified as the DBA for the Pool. The other Skills could lack specific Resources for a number of reasons:

- The specific identity of the Resource is not important for planning purposes.
- The specific Resource is not yet determined.
- The Line represents more than one Resource.
- The specific Resource has not been hired.

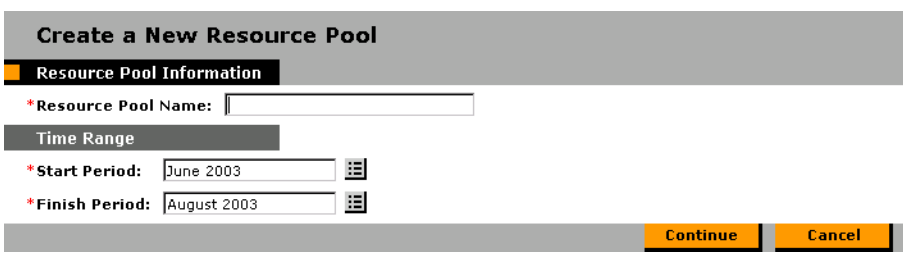
The following sections discuss creating and configuring access to Resource Pools in more detail:

- *Creating a Resource Pool*
- *Resource Pool Security*

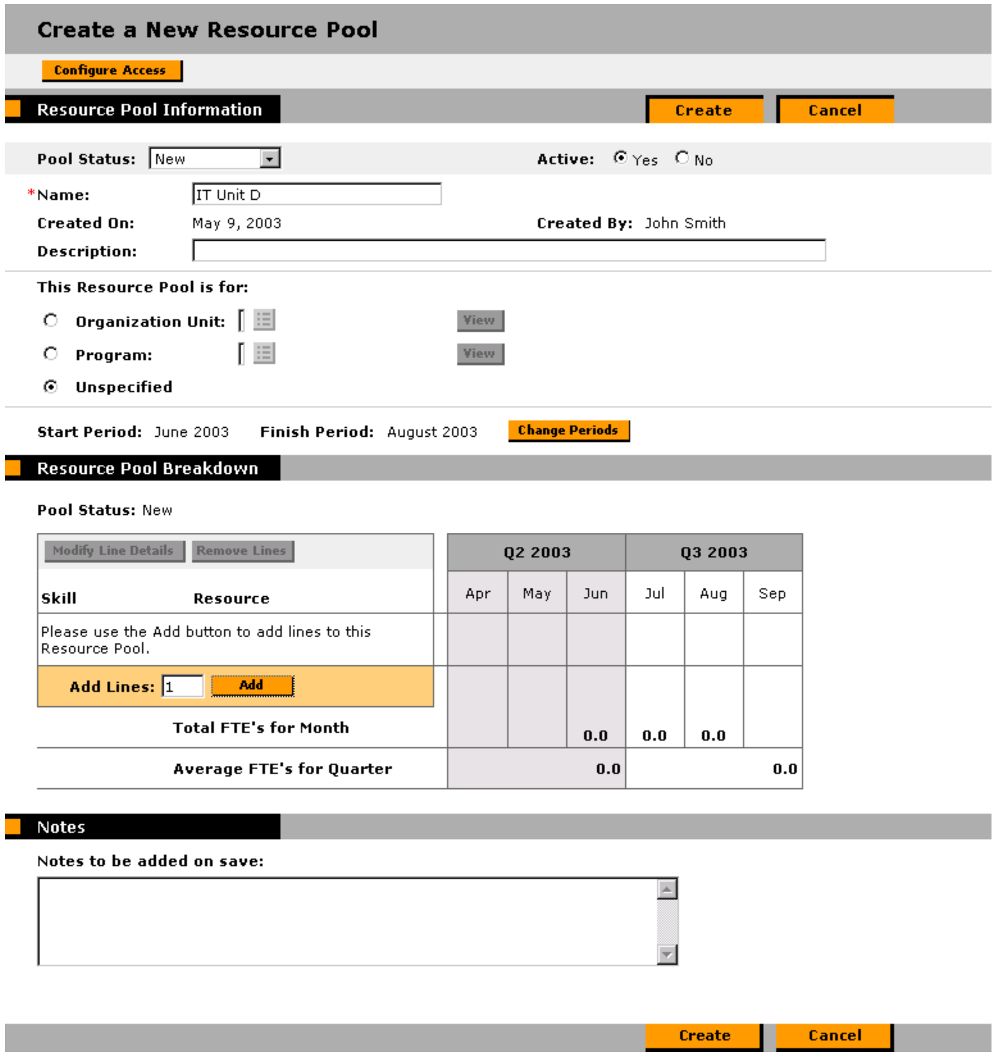
Creating a Resource Pool

To create a Resource Pool:

1. Log onto Kintana.
2. Select **Create -> Resource Pool** or **Resource -> Resource Pools -> Create a Resource Pool** from the navigation bar. The first Create a New Resource Pool page opens.



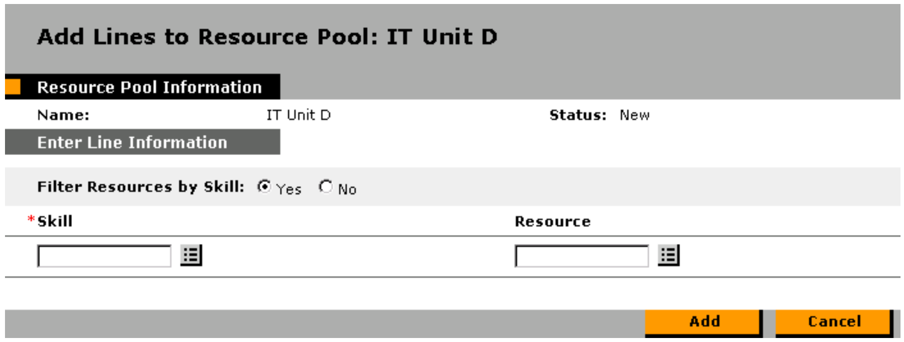
3. Fill in the Resource Pool Name and define a Start Period and Finish Period for the Resource Pool before clicking **Continue**. The next Create a New Resource Pool page opens.



4. Fill in any desired fields in the Resource Pool Information section.

5. Add lines to the Resource Pool Breakdown.

   a. Specify a number in the Add Lines field and click **Add**. The Add Lines to Resource Pool page opens.



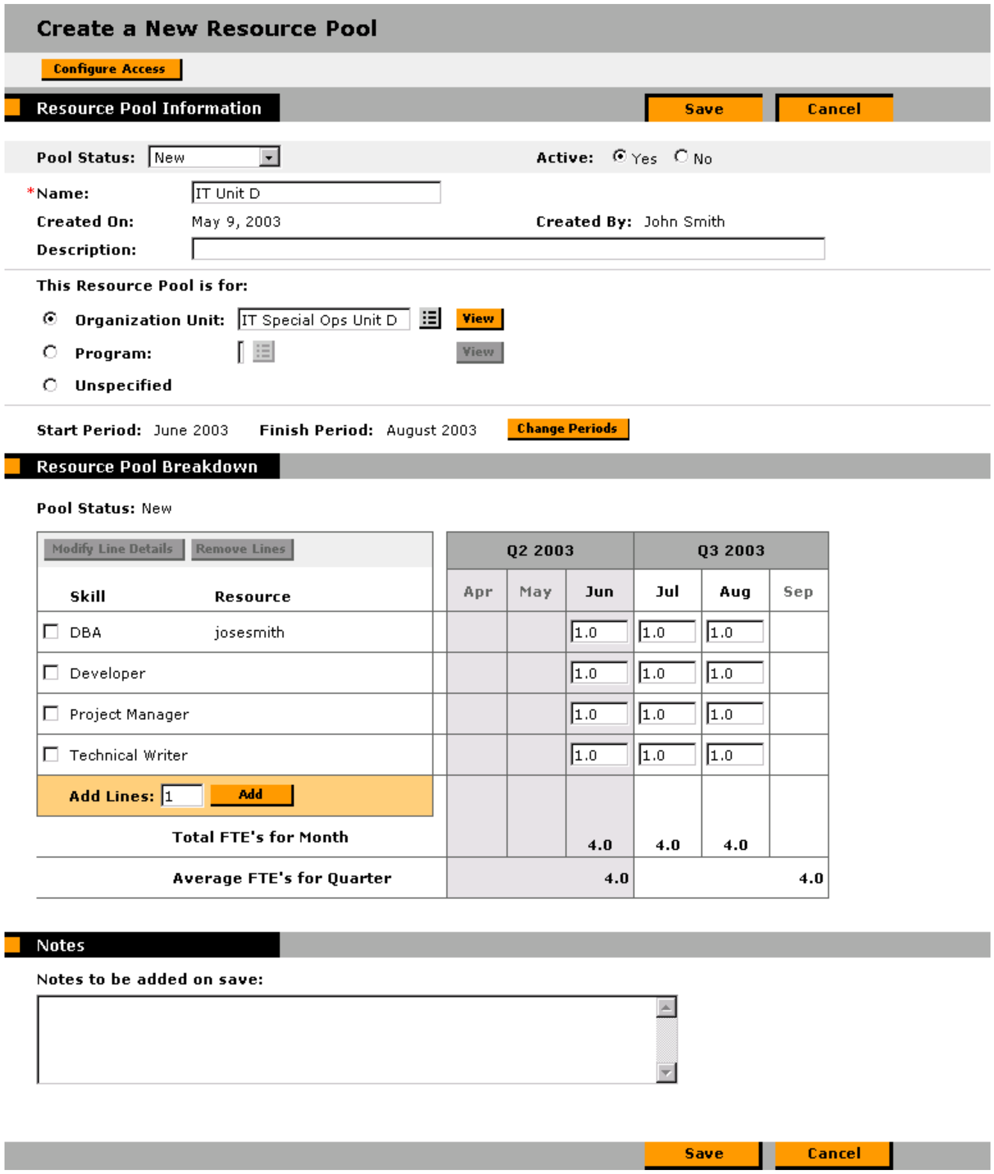
b. Select a SKILL for the Resource Pool line.

c. (optional) Specify a RESOURCE for the Resource Pool line. Only Resources with the selected SKILL will appear in the auto-complete list unless you select **NO** in the FILTER RESOURCES BY SKILL option.

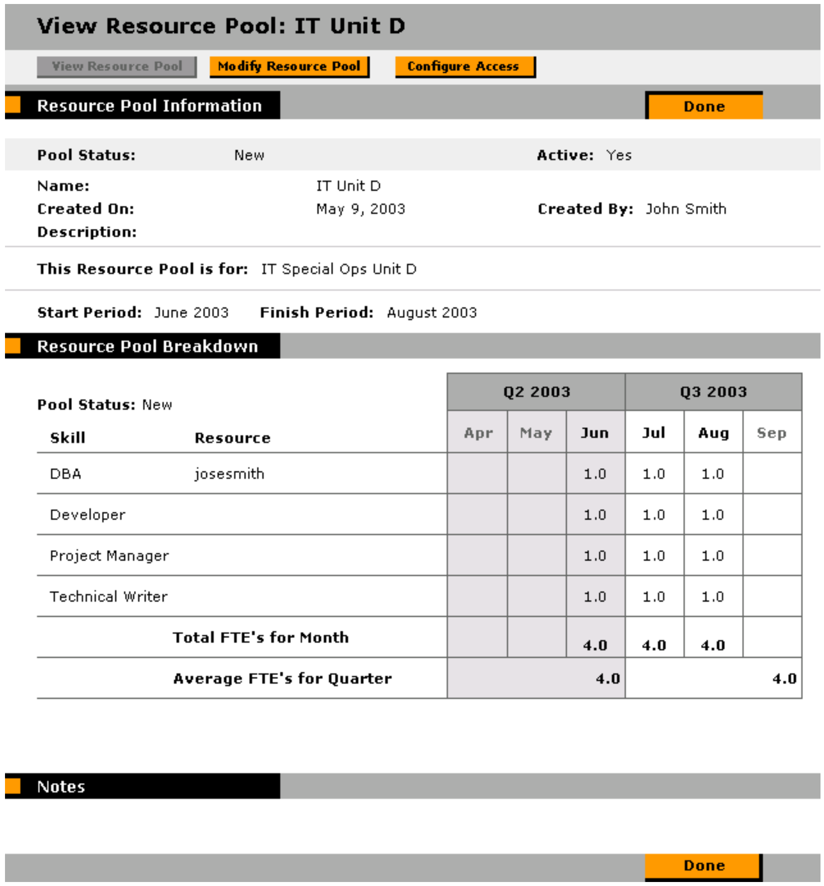
d. Click **ADD**. The CREATE A NEW RESOURCE POOL page reloads with the Resource Pool lines added.

e. Repeat as necessary. You can add more than one line to the Resource Pool at a time by entering the number of desired lines into the ADD LINES field and clicking **ADD**.

6. Specify Full-Time Equivalent values for each Resource Pool line.



7. Click **SAVE**. The Resource Pool is created and the VIEW RESOURCE POOL page opens.



Resource Pool Security

Access to a Resource Pool is controlled primarily through Access Grants set in the Security Group definitions. Additionally, the user who creates a Resource Pool can specify a list of users who can view it, edit its basic information, edit its lines, or edit its security. The following sections describe the security surrounding Resource Pools in more detail:

- *Resource Pool Access Grants*
- *Resource Pool Configure Access Page*
- *Using the Configure Access Page*

Resource Pool Access Grants

Users are linked to Access Grants through the Security Group they are a part of. For more information on Access Grants and Security Groups, see the *"Kintana Security Model"*. The Access Grants surrounding Resource Pools are discussed in more detail in *Table 5-2*. Without these Access Grants, a user cannot view or edit a Resource Pool regardless of whether they are specified in the list on the Resource Pool's CONFIGURE ACCESS page.

Table 5-2. Resource Pool Access Grants

Access Grant	Description
VIEW RESOURCE POOLS	The user can view any Resource Pool for which they are on the specified VIEW or EDIT list.
VIEW ALL RESOURCE POOLS	The user can view any Resource Pool in the system, even if they are not listed in the VIEW or EDIT list.
EDIT RESOURCE POOLS	The user can edit any Resource Pool for which they are on the specified EDIT list.
CREATE RESOURCE POOLS	The user can create new Resource Pools. Supplemental to the EDIT RESOURCE POOLS or EDIT ALL RESOURCE POOLS Access Grant.
EDIT ALL RESOURCE POOLS	The user can edit any Resource Pool in the system.
UPDATE RESOURCE POOL STATUS	The user can update the POOL STATUS. Supplemental to the EDIT RESOURCE POOLS or EDIT ALL RESOURCE POOLS Access Grant.
APPROVE RESOURCE POOLS	The user can set the POOL STATUS to **APPROVED**. Supplemental to the EDIT RESOURCE POOLS or EDIT ALL RESOURCE POOLS Access Grant.

Resource Pool Configure Access Page

The CONFIGURE ACCESS page for a Resource Pool is used to grant additional editing access to the Resource Pool to each user on the list individually. All users listed on the CONFIGURE ACCESS page automatically have viewing access at the least.

Note

Without the proper Access Grants, a user cannot view or edit a Resource Pool regardless of whether they are specified in the list on the Resource Pool's CONFIGURE ACCESS page. See *"Resource Pool Access Grants"* on page 64 for more detailed information.

The CONFIGURE ACCESS page options are discussed in more detail in *Table 5-3*.

Table 5-3. Security Options for Resource Pool Configure Access Page

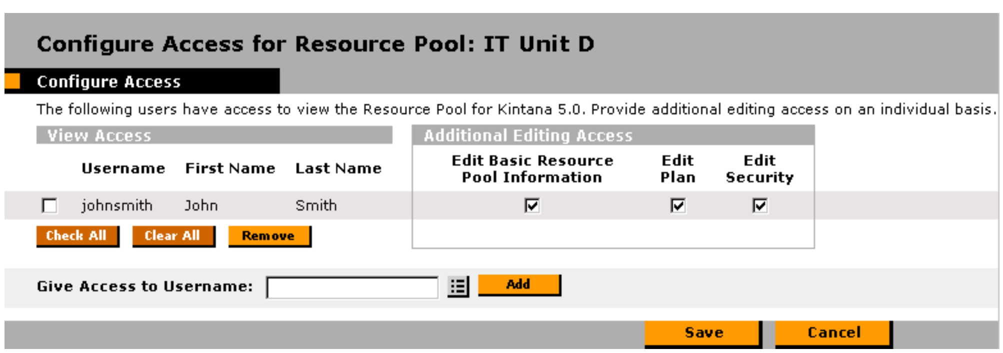
Option	Description
View Access	The user can view the Resource Pool but not edit its information. Any user listed has View access.
Edit Basic Resource Pool Information	The user can edit the fields in the Resource Pool Information section, but not the actual Resource Pool Breakdown, nor change periods.
Edit Plan	The user can edit the Resource Pool Breakdown, but not the fields in the Resource Pool Information section.
Edit Security	The user can use the Configure Access page to edit viewing or editing security for the Resource Pool.

Using the Configure Access Page

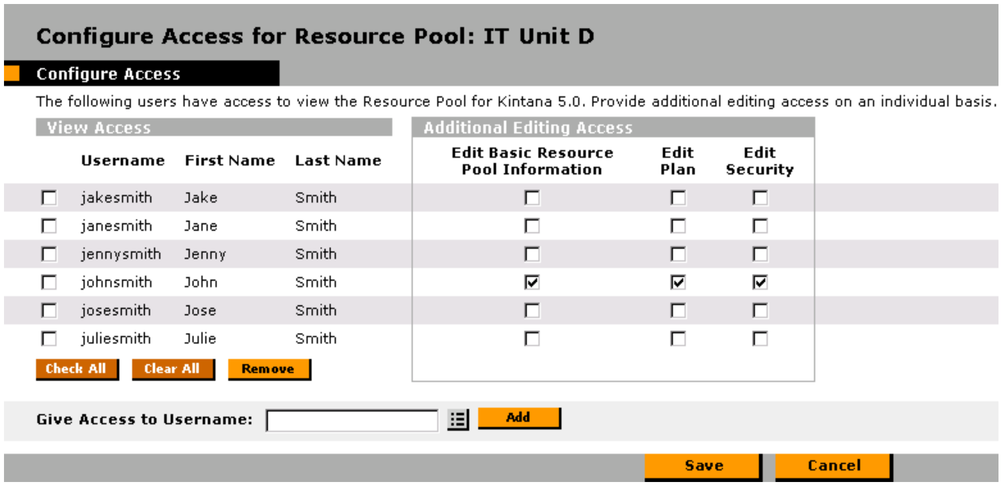
To set up a list of users with View or Edit access to a Resource Pool:

1. Open the View Resource Pool page. If you have permission to modify the Resource Pool, the **Modify Resource Pool** and **Configure Access** buttons will be enabled.

2. Click **Configure Access**. The Configure Access for Resource Pool page opens.



3. Add a user or group of users to the list by selecting from the Give Access to Username multi-select auto-complete list and clicking **Add**.



4. You can configure each user's access individually by selecting the checkboxes. See *Table 5-3 on page 66* for more detailed information on each option.

5. Click **Save**.

Tracking Demand with Staffing Profiles

Staffing Profiles enable a Project manager to track the forecast demand of Resources, arranged by Skill. Each line in a Staffing Profile tracks a Skill, and optionally a Resource who possesses that Skill. Staffing Profiles can be associated with Organization Units, making them easy to access. *Figure 5-2* depicts a Staffing Profile being modified.

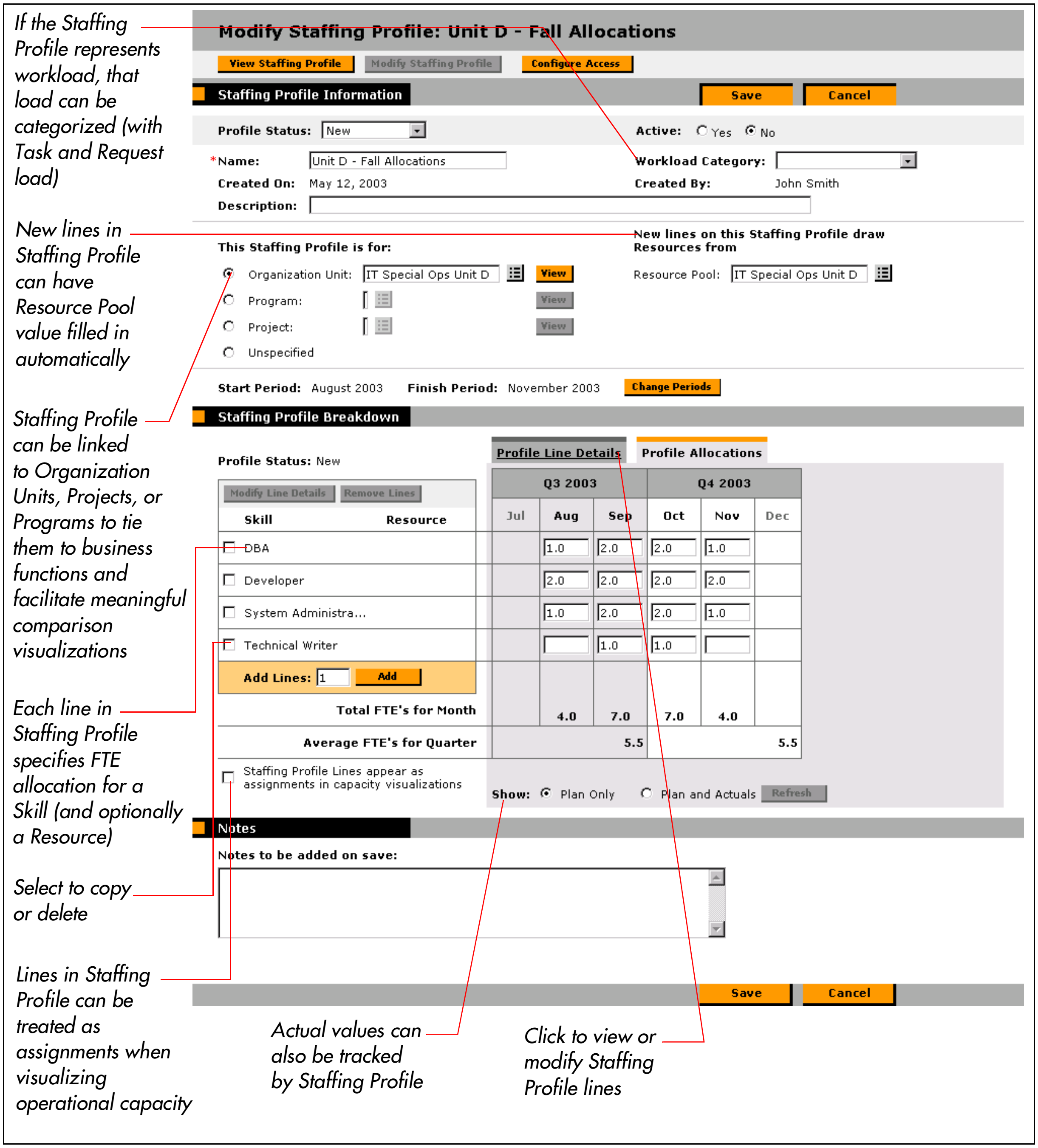


Figure 5-2 Staffing Profile

Table 5-4 describes the key attributes of a Staffing Profile:

Table 5-4. Staffing Profile Attributes

Field	Description
Staffing Profile Information	
PROFILE STATUS	The status of the Staffing Profile. Possible values: **NEW**, **PROPOSED**, **UNDER REVIEW**, **IN REWORK**, **ON HOLD**, **APPROVED**, **REJECTED**, **CANCELLED**, **CLOSED**
ACTIVE	Whether or not the Staffing Profile is active. Inactive Staffing Profiles are not included in Resource Management visualizations.
NAME	The name of the Staffing Profile.
WORKLOAD CATEGORY	The category of work being tracked by the Staffing Profile.
CREATED ON	The date the Staffing Profile was created.
CREATED BY	The user who created the Staffing Profile.
DESCRIPTION	A description of the Staffing Profile.
THIS STAFFING PROFILE IS FOR	Defines whether the Staffing Profile is associated with an ORGANIZATION UNIT, a PROGRAM (if Kintana PMO Solution is installed), a Drive Master PROJECT, or UNSPECIFIED.
NEW LINES ON THIS STAFFING PROFILE DRAW RESOURCES FROM	When adding a line to the Staffing Profile, the RESOURCE POOL field will be automatically defaulted with this value.
START PERIOD	The starting period (a fiscal month) for the Staffing Profile.
FINISH PERIOD	The ending period (a fiscal month) for the Staffing Profile.
Staffing Profile Breakdown	
SKILL	The Skill being projected. Each Staffing Profile line can hold one Skill.
RESOURCE	The Resource for the Skill. Each Staffing Profile line can optionally hold one Resource per Skill.
TOTAL FTE'S FOR MONTH	The total Full Time Equivalents for each month being projected in the Staffing Profile.
AVERAGE FTE'S FOR QUARTER	The average Full Time Equivalents per quarter being projected in the Staffing Profile.
STAFFING PROFILE LINES APPEAR AS ASSIGNMENTS IN CAPACITY VISUALIZATIONS	If selected, the Full Time Equivalents set in the Staffing Profile will be counted as actual work assignments in Resource Management capacity visualizations.

Table 5-4. Staffing Profile Attributes

Field	Description
Show	Allows you to choose between tracking **Plan Only** values for the Staffing Profile, or **Plan and Actuals**, which enables you to enter actual values alongside the planned values when they become known.
Notes	Any notes on the Staffing Profile itself.

The following sections discuss creating and configuring access to Staffing Profiles in more detail:

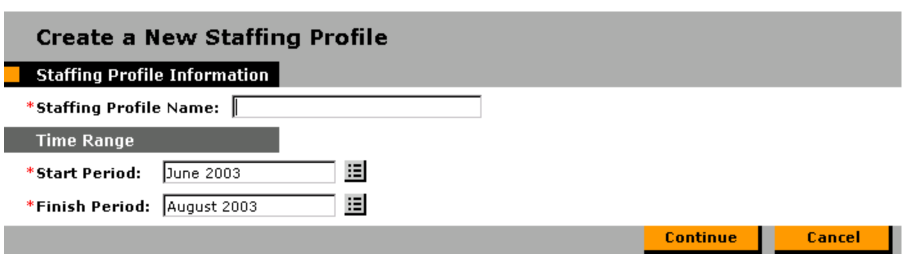
- *Creating a Staffing Profile*
- *Staffing Profile Security*

Creating a Staffing Profile

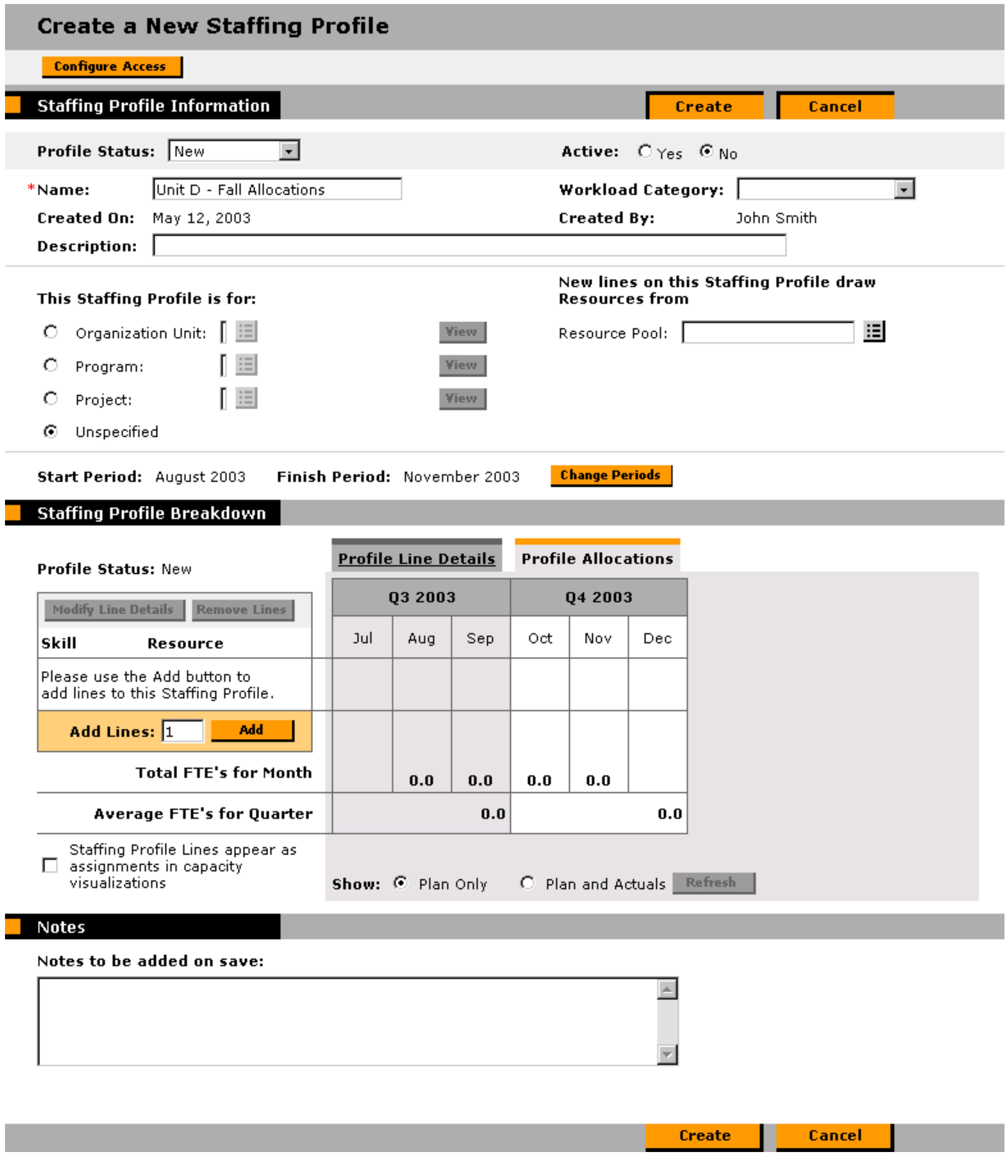
To create a Staffing Profile:

1. Log onto Kintana.

2. Select **Create -> Staffing Profile** or **Resource -> Staffing Profiles -> Create a Staffing Profile** from the navigation bar. The first Create a New Staffing Profile page opens.



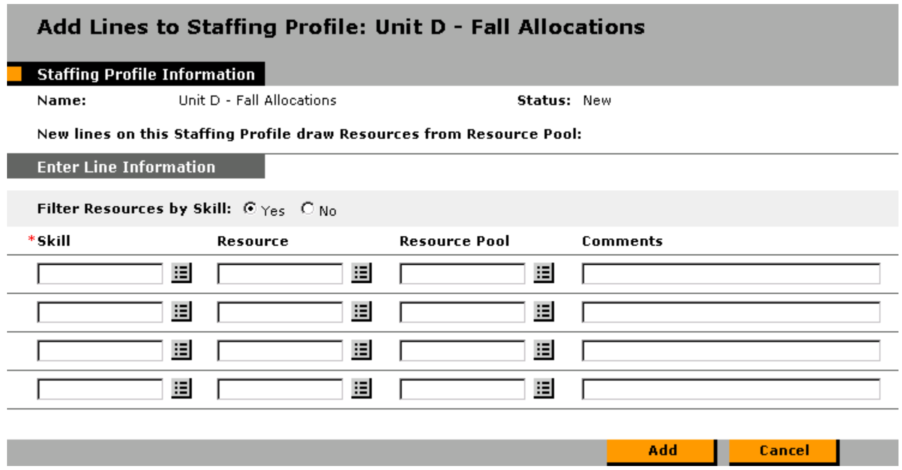
3. Fill in the Staffing Profile Name and define a Start and Finish Period for the Staffing Profile before clicking **Continue.** The next Create a New Staffing Profile page opens.



4. Fill in any desired fields in the STAFFING PROFILE INFORMATION section.

5. Add lines to the STAFFING PROFILE BREAKDOWN.

   a. Specify a number in the ADD LINES field and click **ADD**. The ADD LINES TO STAFFING PROFILE page opens.



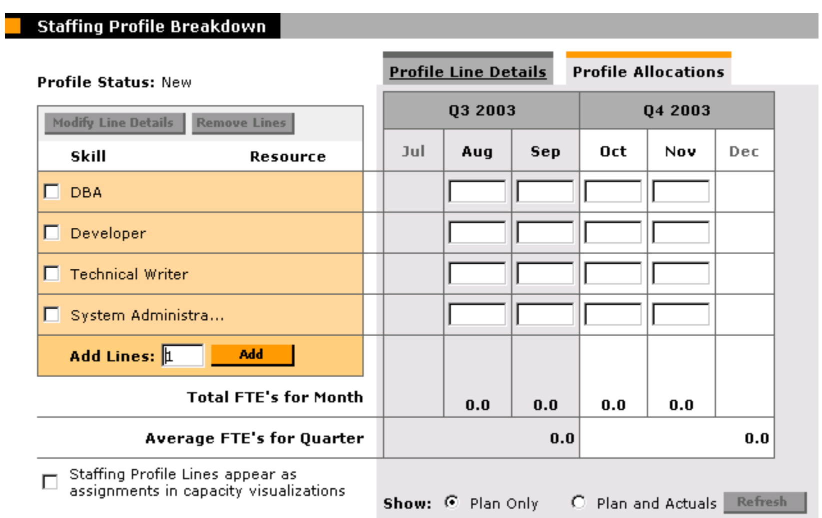
b. Specify a SKILL for the Staffing Profile line.

c. (optional) Specify a RESOURCE for the Staffing Profile line. Only Resources with the selected SKILL will appear in the auto-complete list unless you select **NO** in the FILTER RESOURCES BY SKILL option.

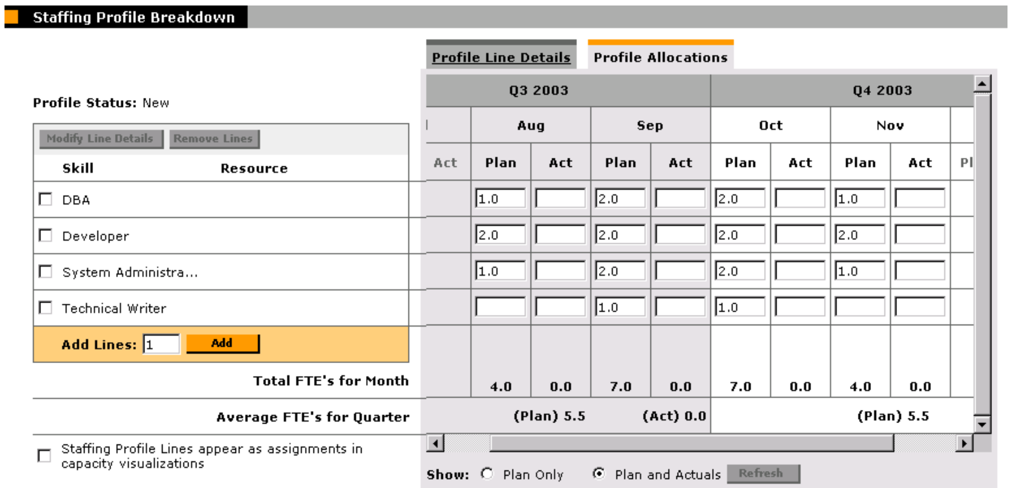
d. Click **ADD**. The CREATE A NEW STAFFING PROFILE page reloads with the Staffing Profile lines added.

e. Repeat as necessary. You can add more than one line to the Resource Pool at a time by entering the number of desired lines into the ADD LINES field and clicking **ADD**.

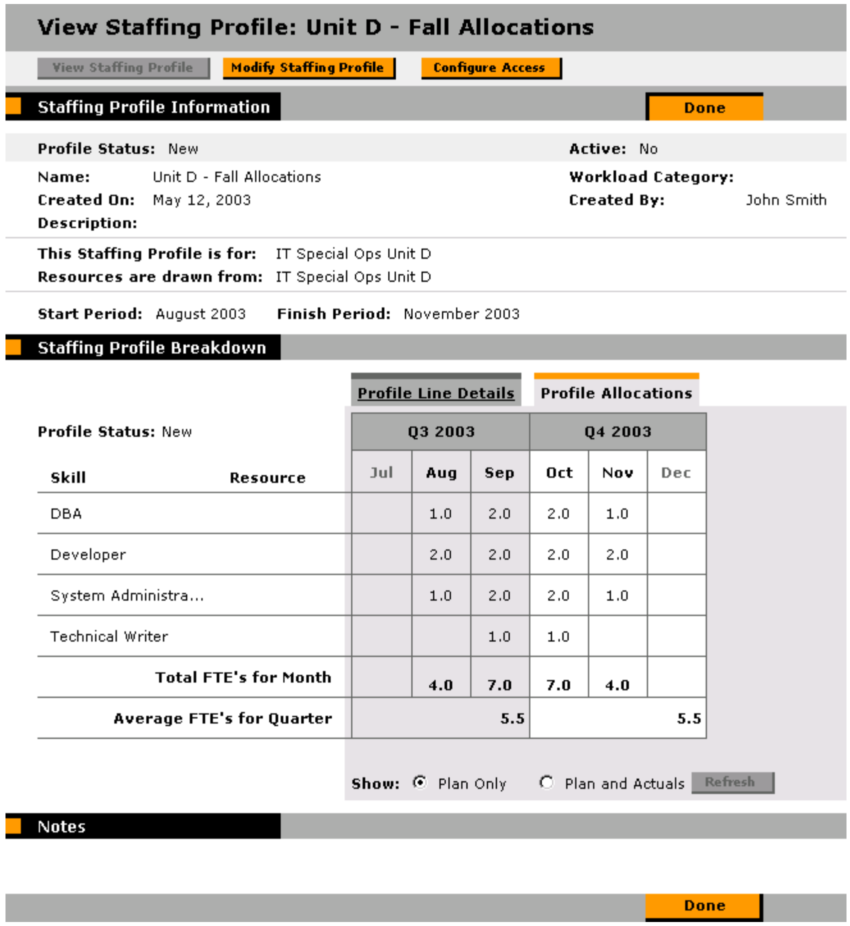
6. Specify Full-Time Equivalent values for each Staffing Profile line.



You can choose to track actual values alongside the planned values in each Staffing Profile line, for comparison purposes. Select the SHOW PLAN AND ACTUALS radio button and click **REFRESH** to track actual values.



7. Click **CREATE**. The Staffing Profile is created and the VIEW STAFFING PROFILE page opens.



Staffing Profile Security

Access to a Staffing Profile is controlled primarily through Access Grants set in the Security Group definitions. Additionally, the user who creates a Staffing Profile can specify a list of users who can view it, edit its basic information, edit its lines, or edit its security. The following sections describe the security surrounding Staffing Profiles in more detail:

- *Staffing Profile Access Grants*
- *Staffing Profile Configure Access Page*
- *Using the Configure Access Page*

Staffing Profile Access Grants

Users are linked to Access Grants through the Security Group they are a part of. For more information on Access Grants and Security Groups, see the *"Kintana Security Model"*. The Access Grants surrounding Staffing Profiles are discussed in more detail in *Table 5-5*. Without these Access Grants, a user cannot view or edit a Staffing Profile regardless of whether they are specified in the list on the Staffing Profile's CONFIGURE ACCESS page.

Table 5-5. Staffing Profile Access Grants

Access Grant	Description
VIEW STAFFING PROFILES	The user can view any Staffing Profile for which they are on the specified VIEW or EDIT list.
VIEW ALL STAFFING PROFILES	The user can view any Staffing Profile in the system.
EDIT STAFFING PROFILES	The user can edit any Staffing Profile for which they are on the specified EDIT list.
CREATE STAFFING PROFILES	The user can create new Staffing Profiles. Supplemental to the EDIT STAFFING PROFILES or EDIT ALL STAFFING PROFILES Access Grant.
EDIT ALL STAFFING PROFILES	The user can edit any Staffing Profile in the system.
UPDATE STAFFING PROFILES STATUS	The user can update the PROFILE STATUS, but nothing else. Supplemental to the EDIT STAFFING PROFILES or EDIT ALL STAFFING PROFILES Access Grant.
APPROVE STAFFING PROFILES	The user can set the PROFILE STATUS to **APPROVED**, but nothing else. Supplemental to the EDIT STAFFING PROFILES or EDIT ALL STAFFING PROFILES Access Grant.

Staffing Profile Configure Access Page

The CONFIGURE ACCESS page for a Staffing Profile is used to grant additional editing access to the Staffing Profile to each user on the list individually. All users listed on the CONFIGURE ACCESS page automatically have viewing access at least.

Note

Without the proper Access Grants, a user cannot view or edit a Staffing Profile regardless of whether they are specified in the list on the Staffing Profile's CONFIGURE ACCESS page. See *"Staffing Profile Access Grants"* on page 74 for more detailed information.

The CONFIGURE ACCESS page options are discussed in more detail in *Table 5-6*.

Table 5-6. Security Options for Staffing Profile Configure Access Page

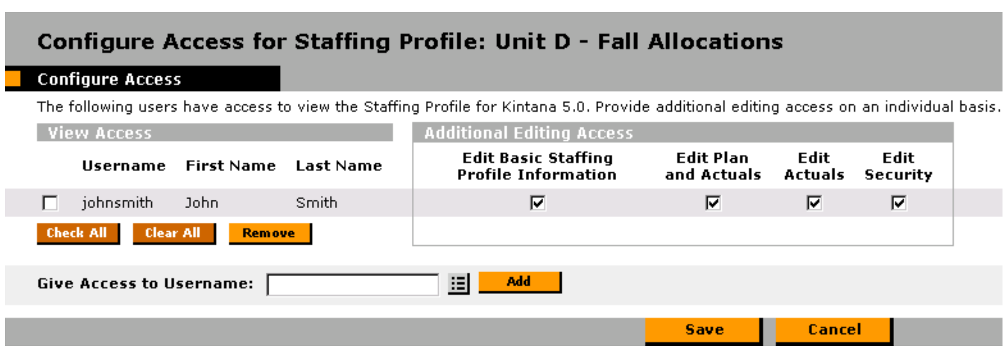
Option	Description
View Access	The user can view the Staffing Profile but not edit its information. Any user listed has View access.
Edit Basic Staffing Profile Information	The user can edit the fields in the Staffing Profile Information section, but not the actual Staffing Profile Breakdown, nor change periods.
Edit Plan	The user can edit the Staffing Profile Breakdown, but not the fields in the Staffing Profile Information section.
Edit Security	The user can use the Configure Access page to edit viewing or editing security for the Staffing Profile.

Using the Configure Access Page

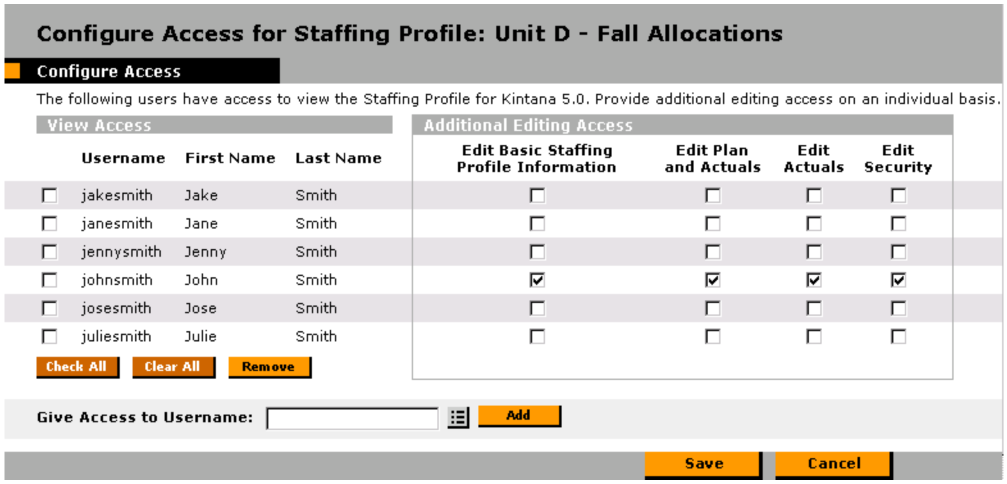
To set up a list of users with View or Edit access to a Staffing Profile:

1. Open the View Staffing Profile page. If you have permission to modify the Staffing Profile, the **Modify Staffing Profile** and **Configure Access** buttons will be enabled.

2. Click **Configure Access**. The Configure Access for Staffing Profile page opens.



3. Add a user or group of users to the list by selecting from the Give Access to Username multi-select auto-complete list and clicking **Add**.



4. You can configure each user's access individually by selecting the checkboxes. Granting EDIT access automatically grants the user VIEW access. See *Table 5-6* for more detailed information on each option.

Click **SAVE**.

Analyzing Resource Pools

Resource capacity planning typically involves the use of Resource Pools and Staffing Profiles in conjunction. The projected capacity of Resources can be tracked with Resource Pools, while anticipated demand is tracked with Staffing Profiles. Comparing a Resource Pool to a Staffing Profile can yield valuable insight on future Resource deployments as they are weighed against planned Resource capacity.

The following sections discuss viewing Resource Pools and comparing Resource Pools to Staffing Profiles in more detail:

- *Viewing Resource Pools*
- *Comparing Resource Pools to Staffing Profiles*

Viewing Resource Pools

Resource Pools can be reached most easily from the Resource Pool List portlet.

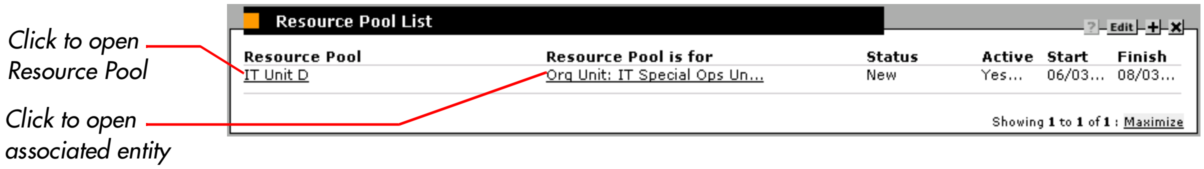


Figure 5-3 Resource Pool List portlet

Users with View or Edit Access Grants for Resource Pools can add the Resource Pool List portlet to their Dashboard.

You can also reach Resource Pools by using the Search Resource Pools page. The Search Resource Pools page is opened by selecting **Search -> Resource Pools** from the navigation bar.

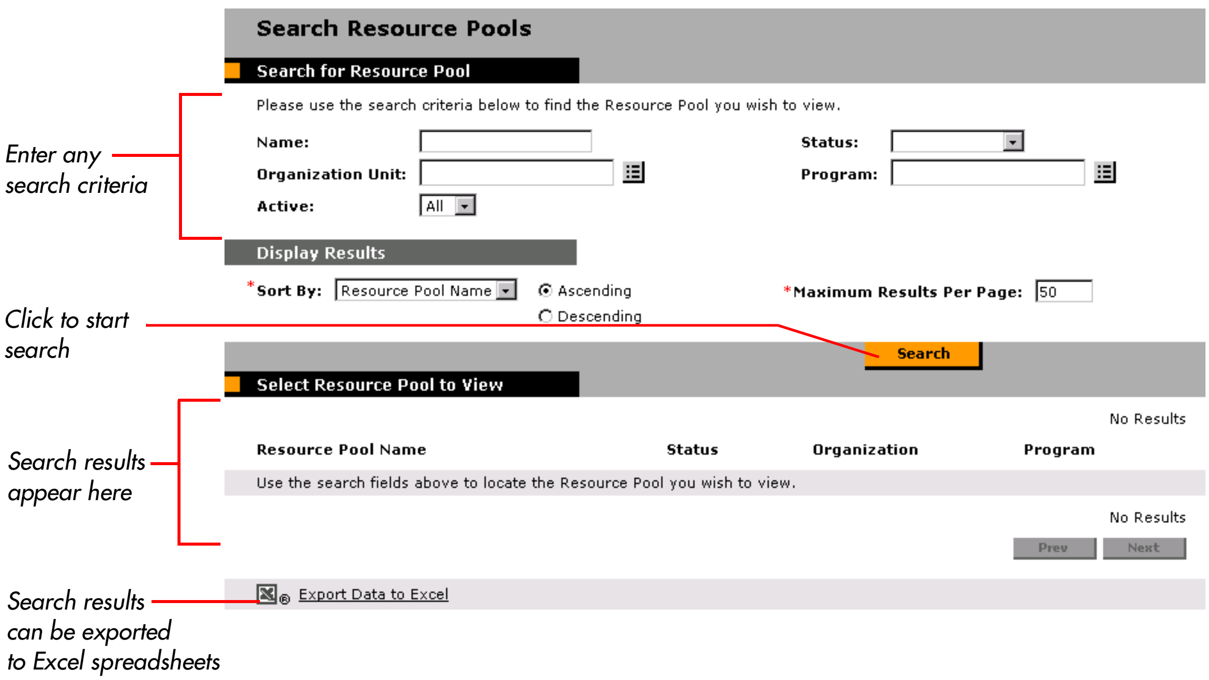


Figure 5-4 Search Resource Pools page

Comparing Resource Pools to Staffing Profiles

The Analyze Resource Pools page provides a way to assess planned load on Resource Pools by directly comparing the projected demand in a Staffing Profile or Profiles to projected capacity in a Resource Pool or Pools.

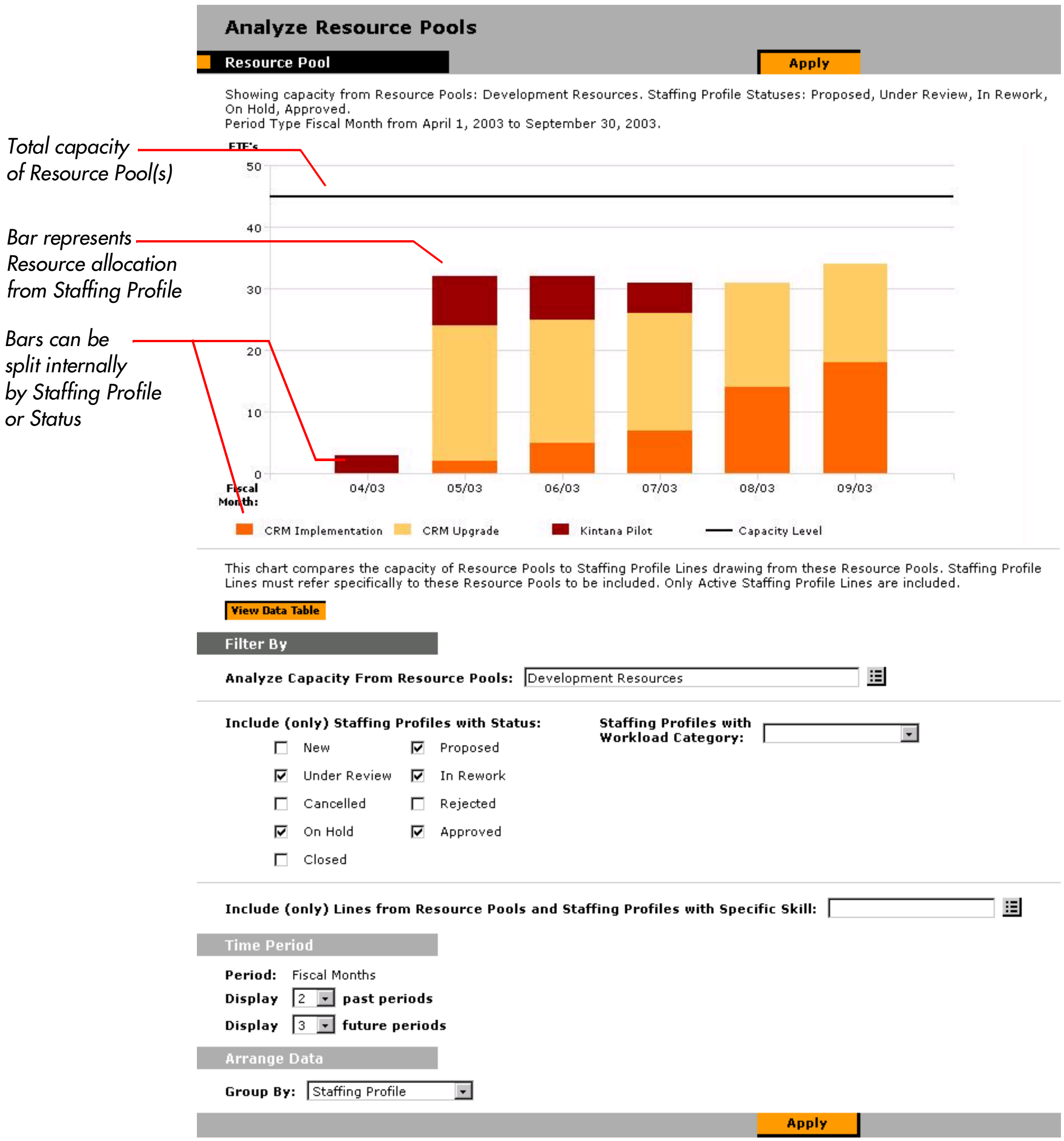


Figure 5-5 Analyze Resource Pools page

The ANALYZE RESOURCE POOLS page can be filtered using the parameters described in *Table 5-7*.

Table 5-7. Analyze Resource Pools page - Parameters

Field	Description
Filter By	
ANALYZE CAPACITY FROM RESOURCE POOLS	A multi-select auto-complete field that selects the Resource Pool or Pools you wish to analyze.
INCLUDE (ONLY) STAFFING PROFILES WITH STATUS	Selects Staffing Profiles with the specified Statuses to display.
STAFFING PROFILES WITH WORKLOAD CATEGORY	Selects Staffing Profiles of a specific WORKLOAD CATEGORY to display.
INCLUDE (ONLY) LINES FROM RESOURCE POOLS AND STAFFING PROFILES WITH SPECIFIC SKILL	A multi-select auto-complete field that selects a Skill or set of Skills to display from the Resource Pools and Staffing Profiles being analyzed.
Time Period	
PERIOD	Display only. Shows the time period being used by the ANALYZE RESOURCE POOLS page.
DISPLAY (X) PAST PERIODS	Selects up to 20 time periods before the current date to include in the ANALYZE RESOURCE POOLS page. Useful for viewing historical trends.
DISPLAY (X) FUTURE PERIODS	Selects up to 20 time periods after the current date to include in the ANALYZE RESOURCE POOLS page.
Arrange Data	
GROUP BY	Determines whether to display the results by **STAFFING PROFILE** or **STAFFING PROFILE STATUS**.

To get a breakdown of total Resource capacity vs. load by Staffing Profile, click **VIEW DATA TABLE.** The ANALYZE RESOURCE POOLS BREAKDOWN TABLE, pictured in *Figure 5-6*, opens in a new window.

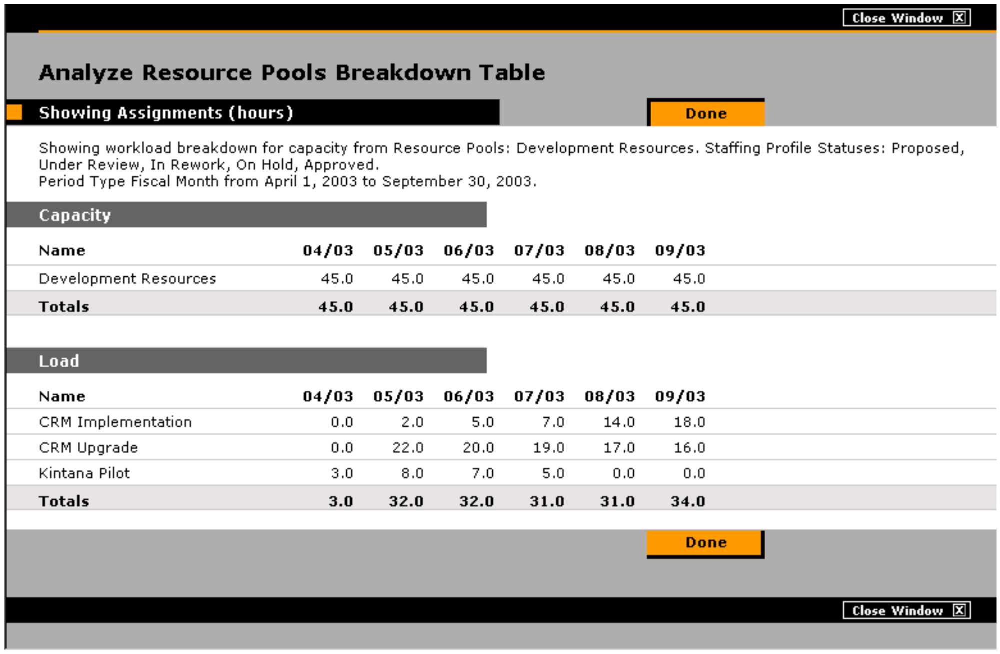


Figure 5-6 Analyze Resource Pools Breakdown Table

The ANALYZE RESOURCE POOLS BREAKDOWN TABLE can be used to obtain a more numerically precise breakdown of projected load distribution. The figures can also be copied and pasted into a spreadsheet program like Microsoft Excel for further manipulation.

The same Resource Pool analysis functionality is available as a portlet. The Analyze Resource Pools portlet is pictured in *Figure 5-7*.

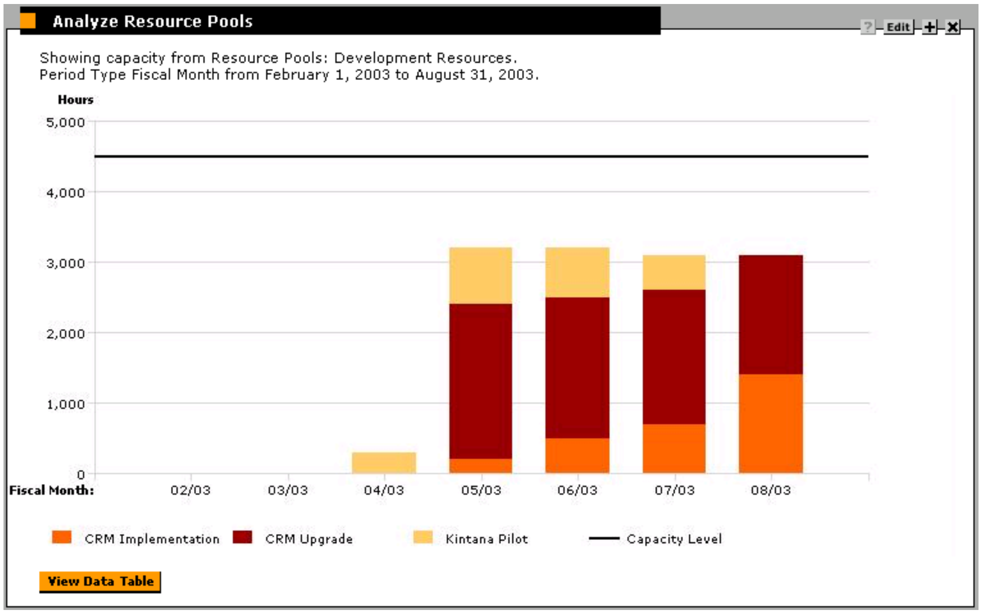


Figure 5-7 Analyze Resource Pools portlet

You can have multiple instances of this portlet on your Dashboard, for keeping track of different Resource Pools.

Analyzing Staffing Profiles

Staffing Profiles, used to project and track future Resource demand, can be a useful Resource capacity planning tool. Staffing Profiles that are associated with Projects can be compared with those Projects to see how well they match up in terms of Resource allocation and actual workload.

The following sections discuss viewing Staffing Profiles and comparing Staffing Profiles to Project assignments in more detail:

- *Viewing Staffing Profiles*
- *Comparing a Project's Assignments to its Staffing Profile*

Viewing Staffing Profiles

Staffing Profiles can be reached most easily from the Staffing Profile List portlet.

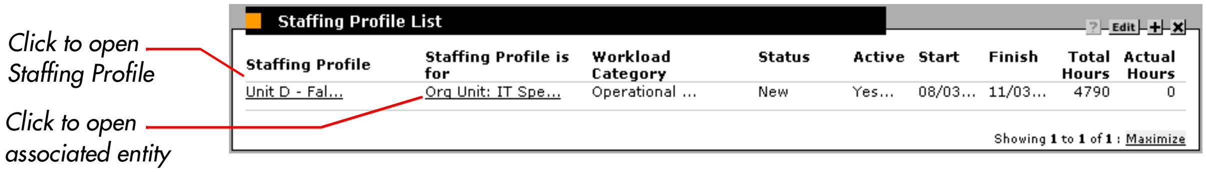


Figure 5-8 Staffing Profile List portlet

Users with the View or Edit access to Staffing Profiles can add the Staffing Profile List portlet to their Dashboard.

You can also reach Staffing Profiles by using the Search Staffing Profiles page. The Search Staffing Profiles page is opened by selecting **Search -> Staffing Profiles** from the navigation bar.

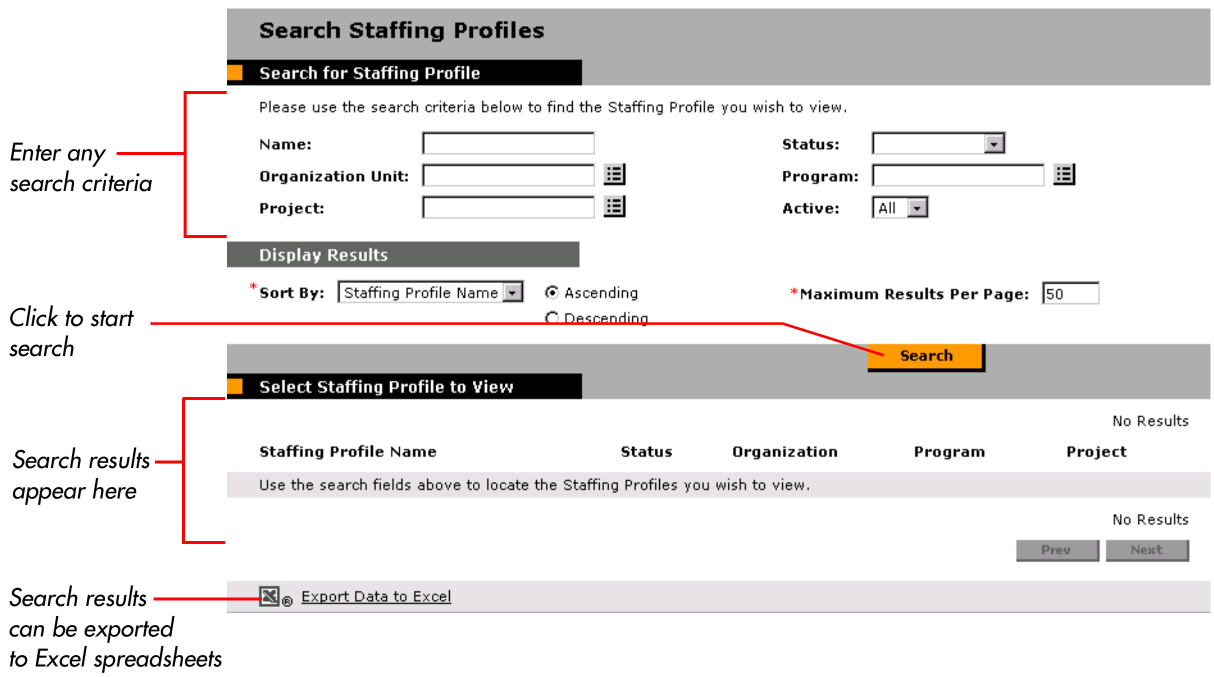


Figure 5-9 Search Staffing Profiles page

Comparing a Project's Assignments to its Staffing Profile

The Compare Project Assignments to Staffing Profile Lines page compares capacity (as the set of active Staffing Profiles for a Project) to assignments within the Project. It can be used to monitor compliance of the Project Plan and actuals to organizationally-agreed-upon staffing levels for the Project. Open it by selecting **RESOURCE -> ANALYZE -> PROJECT ASSIGNMENTS TO STAFFING PROFILE LINES COMPARISON.**

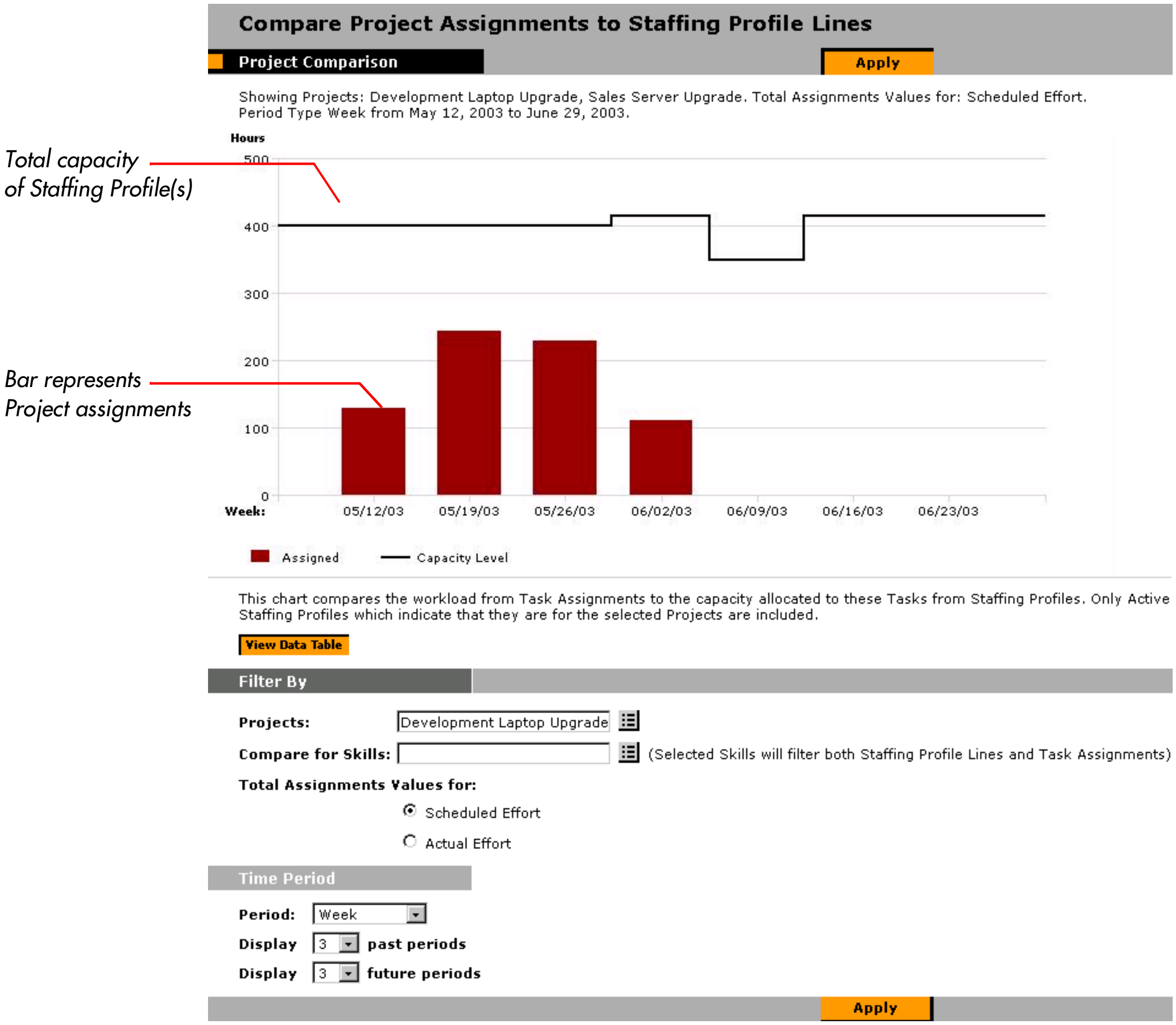


Figure 5-10 Compare Project Assignments to Staffing Profile Lines page

The COMPARE PROJECT ASSIGNMENTS TO STAFFING PROFILE LINES page can be filtered according to the parameters described in *Table 5-8*.

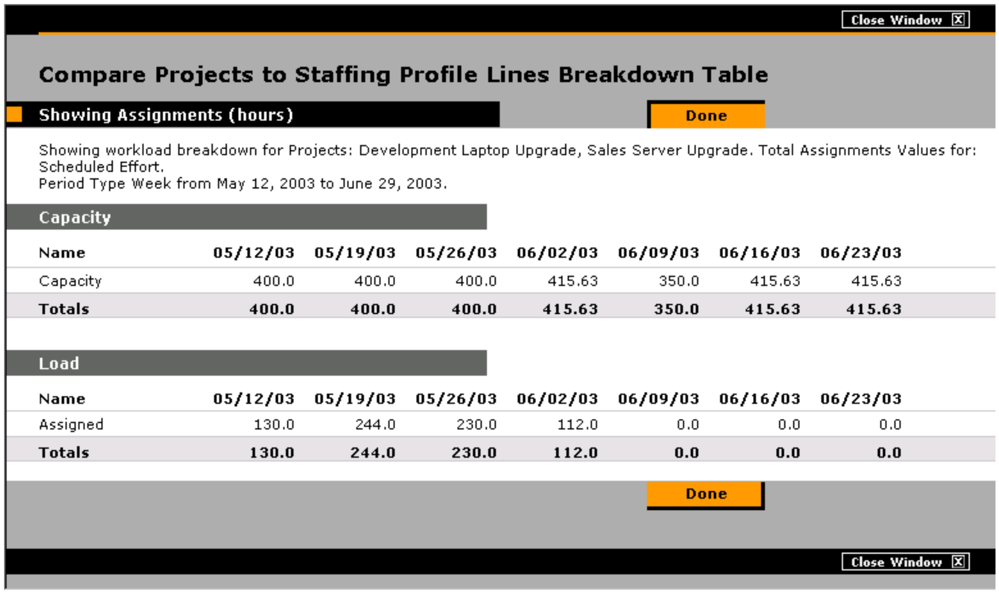
Table 5-8. Compare Project Assignments to Staffing Profile Lines page - parameters

Field	Description
Filter By	

Table 5-8. Compare Project Assignments to Staffing Profile Lines page - parameters

Field	Description
Projects	A multi-select auto-complete field that selects the Projects to display in the Compare Project Assignments to Staffing Profile Lines page. All Staffing Profile lines from active Staffing Profiles associated with these Projects are included automatically in the visualization.
Compare for Skills	A multi-select auto-complete field that selects the Skills specified in both Staffing Profile lines and Task assignments which will be displayed.
Total Assignments Values for	Sets whether to display **Scheduled** or **Actual Effort** in the Compare Project Assignments to Staffing Profile Lines page.
Time Period	
Period	Sets the time period being used by the Compare Project Assignments to Staffing Profile Lines page.
Display (x) past periods	Selects up to 20 time periods before the current date to include in the Compare Project Assignments to Staffing Profile Lines page. Useful for viewing historical trends.
Display (x) future periods	Selects up to 20 time periods after the current date to include in the Compare Project Assignments to Staffing Profile Lines page.

To get a breakdown of total Staffing Profile capacity vs. Project assignments, click **View Data Table**. The Compare Project Assignments to Staffing Profile Lines Breakdown Table, pictured in *Figure 5-11*, opens in a new window.


Close Window

Compare Projects to Staffing Profile Lines Breakdown Table

Showing Assignments (hours)

Done

Showing workload breakdown for Projects: Development Laptop Upgrade, Sales Server Upgrade. Total Assignments Values for: Scheduled Effort.
Period Type Week from May 12, 2003 to June 29, 2003.

Capacity

Name	05/12/03	05/19/03	05/26/03	06/02/03	06/09/03	06/16/03	06/23/03
Capacity	400.0	400.0	400.0	415.63	350.0	415.63	415.63
Totals	**400.0**	**400.0**	**400.0**	**415.63**	**350.0**	**415.63**	**415.63**

Load

Name	05/12/03	05/19/03	05/26/03	06/02/03	06/09/03	06/16/03	06/23/03
Assigned	130.0	244.0	230.0	112.0	0.0	0.0	0.0
Totals	**130.0**	**244.0**	**230.0**	**112.0**	**0.0**	**0.0**	**0.0**

Done

Close Window

Figure 5-11 Compare Projects to Staffing Profile Lines Breakdown Table

The COMPARE PROJECT ASSIGNMENTS TO STAFFING PROFILE LINES BREAKDOWN TABLE can be used to obtain a breakdown of capacity vs. Project assignment distribution. The figures can also be copied and pasted into a spreadsheet program like Microsoft Excel for further manipulation.

The same Staffing Profile analysis functionality is available as a portlet. The Compare Project Assignments to Staffing Profile Lines portlet is pictured in *Figure 5-12*.

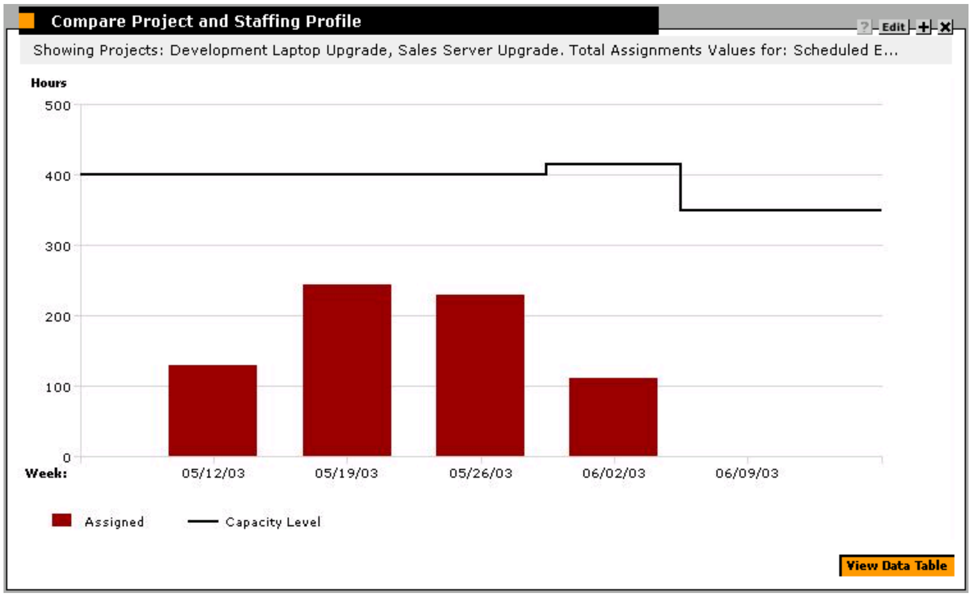


Figure 5-12 Compare Project Assignments to Staffing Profile Lines portlet

You can have multiple instances of this portlet on your Dashboard, for keeping track of different Projects and their associated Staffing Profiles.

Chapter 6

Using Resource Management for Operational Planning

Kintana Resource Management can be used for operational Resource planning, which concerns itself with how Resources are being used for current work. Operational Resource planning in Kintana can consist of the following activities:

- Viewing present Resource usage
- Determining areas of over-allocation and under-allocation of workload among Resources (load balancing)
- Displaying personal workload for the present and near future

Whereas Resource capacity planning typically involves only management-level personnel and higher, operational Resource planning concerns two main sets of users:

- **Managers** — Use Kintana to analyze Resource workload for their teams and take the appropriate actions
- **Team members** — View their own workload with handy visualizations and spot potential trouble areas

Workload tracked in Kintana can consist of either Project Tasks or Requests.

> Note: Assignments made to Resources in Staffing Profile lines can also be tracked as operational load if so desired. See *"Tracking Demand with Staffing Profiles"* on page 67 for more information on Staffing Profiles.

The following sections discuss the details of assigning Task or Request Work Items, tracking allocations, and visualizing workload:

- *Configuring Requests for Resource Management*

- *Assigning Requests*
- *Assigning Tasks*
- *Overriding Scheduled and Actual Values*
- *Viewing Work Items*
- *Visualizing Assignments*

Configuring Requests for Resource Management

In order to count Requests as Work Items to be tracked in Resource Management, you must associate Work Item fields with them. See *"Setting Up Request Work Item Fields"* on page 30 for more detailed information on putting Work Item fields with Requests.

A Request Work Item features the fields described in *Table 6-1*.

Table 6-1. Request Work Item fields

Field	Description
WORKLOAD/NON WORKLOAD	Whether the Request Work Item is counted as load against the assigned Resource's capacity.
WORKLOAD CATEGORY	The reporting category of the Request Work Item.
SCHEDULED START DATE	The scheduled start date for the Request Work Item.
SCHEDULED FINISH DATE	The scheduled finish date for the Request Work Item.
SCHEDULED DURATION	The scheduled duration for the Request Work Item.
SCHEDULED EFFORT	The scheduled effort for the Request Work Item.
ASSIGNED RESOURCE	(Already present as the ASSIGNED USER)
SKILL	The Skill being used by the ASSIGNED RESOURCE. This defaults to the Primary Skill unless otherwise specified.
% COMPLETE	(Automatically updated by Request Workflow)
ACTUAL START DATE	The actual start date for the Request Work Item.
ACTUAL FINISH DATE	The actual finish date for the Request Work Item.
ACTUAL DURATION	The actual duration for the Request Work Item.
ACTUAL EFFORT	The actual effort for the Request Work Item.

These Work Item fields have Resource Management interaction built into them through Request Type Rules and other built-in system functionality. For more information on Request Type Rules, see *"Configuring a Request Resolution System"*.

The following Work Item fields can be safely customized with minimal impact to Resource Management functionality:

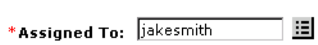
- Workload/Non Workload (if set to **NO**, the Request is not counted as workload)
- Workload Category

Certain Work Item fields have strong functional defaults, such that altering the way they work could have unintended side effects. The following Work Item fields can have Rules that read their values, but generally should not be altered unless you need to specify effort other than full time:

- Scheduled Duration
- Actual Duration
- Scheduled Effort
- Actual Effort

Assigning Requests

Requests are assigned in the Kintana interface. Setting a Resource as the ASSIGNED TO user for a Request automatically books that Resource for the Request.



Booking a Resource for a Request also books that Resource's Primary Skill. If the Resource has a different Skill you wish to book, simply change the value in the SKILL field.

The Request counts as load against the Resource's capacity and will show up in Resource Management visualizations, such as the two-week Resource Gantt chart pictured in *Figure 6-1*. If the WORKLOAD flag is enabled, the Request will show up in load histograms.

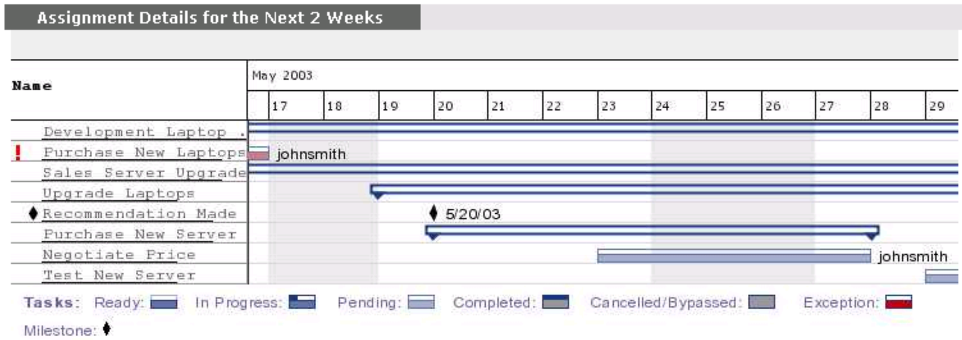


Figure 6-1 Resource Assignment Gantt chart

To view your two-week Resource Gantt chart, select **SETTINGS -> VIEW MY RESOURCE INFORMATION** from the navigation bar in the Kintana interface.

Note

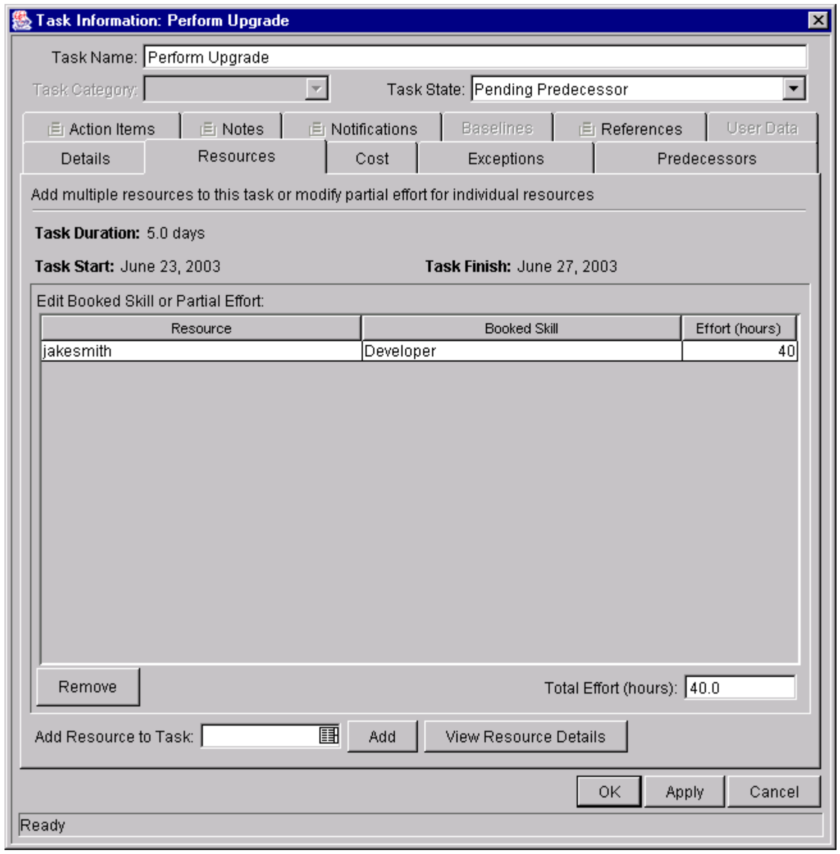
To view a Gantt chart, you must have a license for Kintana Drive.

Assigning Tasks

Tasks are assigned in the Kintana Workbench interface. Setting a Resource as the RESOURCE for a Task automatically books that Resource for the Task.

Booking a Resource for a Task also books that Resource’s Primary Skill. If the Resource has a different Skill you wish to book:

1. Open the Project in the Kintana Workbench.
2. Open the TASK INFORMATION window for the Task you want and click on the **RESOURCES** tab.



3. Select a different Skill from the SKILL auto-complete list.

4. Click **APPLY** to save changes and continue to work in the TASK INFORMATION window. Click **OK** to save changes and close the TASK INFORMATION window.

Assigned Tasks automatically count as load against a Resource's capacity, and will show up in Resource Management visualizations such as the two-week Resource Gantt chart pictured in *Figure 6-1*.

The following sections discuss more advanced topics in Resource assignment:

- *Booking Multiple Resources on a Task*
- *Microsoft Project Integration*

Booking Multiple Resources on a Task

A Task can be assigned to more than one Resource. Assigning multiple Resources to a Task results in the following Resource Management behaviors:

- Each assigned Resource is booked for the Task's entire Scheduled Duration. The Scheduled Effort is adjusted proportionately. For example, a one-day duration Task, with a 10-hour workday and two Resources assigned, would default to 20 hours of effort.

- Each assigned Resource is booked for their Primary Skill.

To assign multiple Resources to a Task:

1. Open the Project in the Kintana Workbench.
2. In the Project Plan Panel, enter the username of each Resource in the Task line's RESOURCE field, separated by semicolons.

   or

   In the Project Plan Panel, use the Task line's multi-select RESOURCE auto-complete field to assign multiple Resources.

   or

   Open the Task's TASK INFORMATION window and click on the **RESOURCES** tab.

   a. Add a new Resource to the Task by selecting one from the ADD RESOURCE TO TASK auto-complete list and clicking **ADD**.

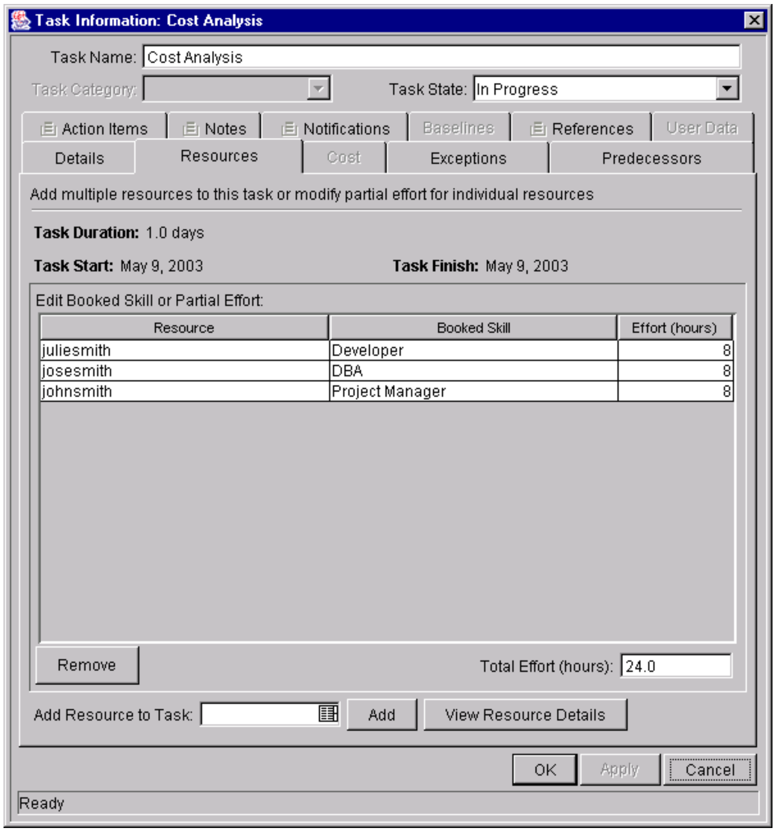
   b. Click **APPLY** to save changes and continue to work in the TASK INFORMATION window. Click **OK** to save changes and close the TASK INFORMATION window.

3. Click **SAVE**.

The values for each individual Resource's Scheduled Effort and Skill can be altered in the TASK INFORMATION window.

To change the booked Skill or Scheduled Effort for multiple Resources assigned to a Task:

1. Open the Project in the Kintana Workbench.
2. Open the TASK INFORMATION window for the Task you want and click on the **RESOURCES** tab.



3. For each Resource, select a Skill from the auto-complete list in the BOOKED SKILL column.

4. For each Resource, enter a value in the EFFORT numeric field.

   The TOTAL EFFORT (HOURS) field updates itself automatically when **APPLY** is clicked. If TOTAL EFFORT is altered directly, the partial effort of each Resource is adjusted proportionately.

5. (optional) Add a new Resource to the Task by selecting one from the ADD RESOURCE TO TASK auto-complete list and clicking **ADD**.

6. Click **APPLY** to save changes and continue to work in the TASK INFORMATION window. Click **OK** to save changes and close the TASK INFORMATION window.

Microsoft Project Integration

For multi-Resource Tasks, Resource Units in Microsoft Project are imported, and are used to determine the Scheduled Effort/Resource on corresponding Drive Tasks.

Overriding Scheduled and Actual Values

Work Items (both Tasks and Requests) have fields for the SCHEDULED and ACTUAL values for:

- START DATE
- FINISH DATE
- DURATION
- EFFORT

The SCHEDULED fields are related to each other in the following ways:

SCHEDULED DURATION = SCHEDULED FINISH DATE - SCHEDULED START DATE - (Global Calendar Non-Working Days)

SCHEDULED EFFORT = SCHEDULED DURATION * (Working hours in a day defined from Global Calendar)

The following sections discuss the implications of altering the Scheduled or Actual values for the above Work Item fields:

- *Scheduled Value Field Relationships*
- *Actual Value Field Relationships*

Scheduled Value Field Relationships

The SCHEDULED DURATION and SCHEDULED EFFORT for a Work Item are automatically calculated in the following manner:

SCHEDULED DURATION = SCHEDULED FINISH DATE - SCHEDULED START DATE - (Global Calendar Non-Working Days)

SCHEDULED EFFORT = SCHEDULED DURATION * (Working hours in a day defined from Global Calendar

Each of these fields automatically updates the other:

- If the SCHEDULED START DATE is changed by the user, then the SCHEDULED FINISH DATE is automatically updated to reflect the SCHEDULED DURATION.
- If the SCHEDULED FINISH DATE is changed by the user, then the SCHEDULED DURATION is automatically updated and SCHEDULED EFFORT is recalculated.
- If the SCHEDULED DURATION is changed by the user, then the SCHEDULED FINISH DATE is automatically updated to reflect the SCHEDULED DURATION, and SCHEDULED EFFORT is recalculated.

- For a Work Item with multiple Resources, the total SCHEDULED EFFORT is simply the sum of all Resources' SCHEDULED EFFORT. If the total SCHEDULED EFFORT is changed by the user, each assigned user's SCHEDULED EFFORT is changed proportionately. (If the total is doubled, for example, each Resource's SCHEDULED EFFORT will also double.) Concordantly, if an assigned user's SCHEDULED EFFORT is updated, total SCHEDULED EFFORT is recalculated automatically.

Note

Changes to SCHEDULED EFFORT values do not have a "backstream" effect. Updating only the SCHEDULED EFFORT field will not change the SCHEDULED DURATION, which is always derived from the SCHEDULED START and FINISH values. This allows a Task to be assigned at less than full time.

Actual Value Field Relationships

Work Item ACTUAL field values are captured in the following ways:

- START DATE — When the Work Item is started (Task is set to **IN PROGRESS** or Request is submitted)
- FINISH DATE — When the Work Item is completed (Task is set to **COMPLETED** or Request is closed)
- DURATION — Calculated as ACTUAL FINISH DATE - ACTUAL START DATE - (Global Calendar Non-Working Days)
- EFFORT — Calculated as TOTAL SCHEDULED EFFORT * (ACTUAL DURATION / SCHEDULED DURATION)

If the ACTUAL DURATION is changed by the user, then the ACTUAL EFFORT is automatically updated.

Note

Though the ACTUAL EFFORT field can be updated independently, changes to ACTUAL EFFORT do not have a "backstream" effect. Updating only the ACTUAL EFFORT field will not change the ACTUAL DURATION.

To prevent the system from overriding a manually-updated ACTUAL EFFORT value, make sure that you have updated the ACTUAL DURATION or ACTUAL START/FINISH DATES before entering the new ACTUAL EFFORT value.

Viewing Work Items

Once Work Items have been assigned, there are several ways for Resources to view and update their workload from the Kintana interface. The following sections discuss quick and convenient ways for Resources to view Work Items that have been assigned to them:

- *My Tasks Portlet*
- *My Requests Portlet*
- *Personal Load and Capacity Visualizations*

My Tasks Portlet

Task Work Items can be viewed and updated from the My Tasks portlet.

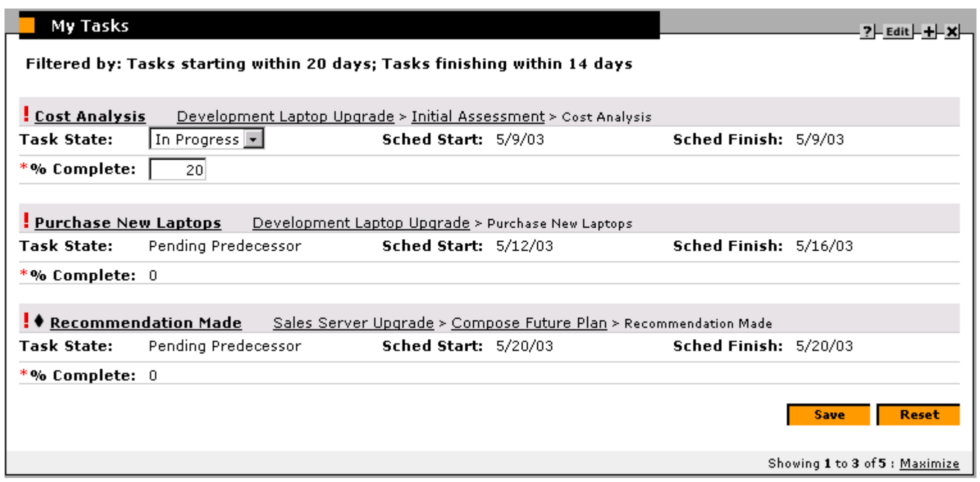


Figure 6-2 My Tasks portlet

Resources with a Kintana Drive license can add the My Tasks portlet to one of their Dashboard pages, enabling them to view Task Work Items that have been assigned to them. The My Tasks portlet can be filtered along many useful parameters.

Example

The My Tasks portlet can be filtered to display only Tasks beginning within the next two weeks that are ready for action whose Predecessors are more than 50% complete.

My Requests Portlet

Request Work Items can be viewed and updated from the My Requests portlet.

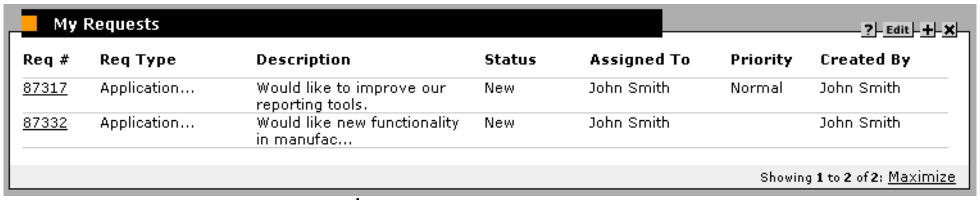


Figure 6-3 My Requests portlet

Resources with a Kintana Create license can add the My Requests portlet to one of their Dashboard pages, enabling them to view Request Work Items that have been assigned to them, or that they have created.

Personal Load and Capacity Visualizations

To see what their upcoming workload looks like, Resources with any Resource Management VIEW or EDIT Access Grant can select **SETTINGS -> VIEW MY RESOURCE INFORMATION** from the navigation bar in the Kintana interface.

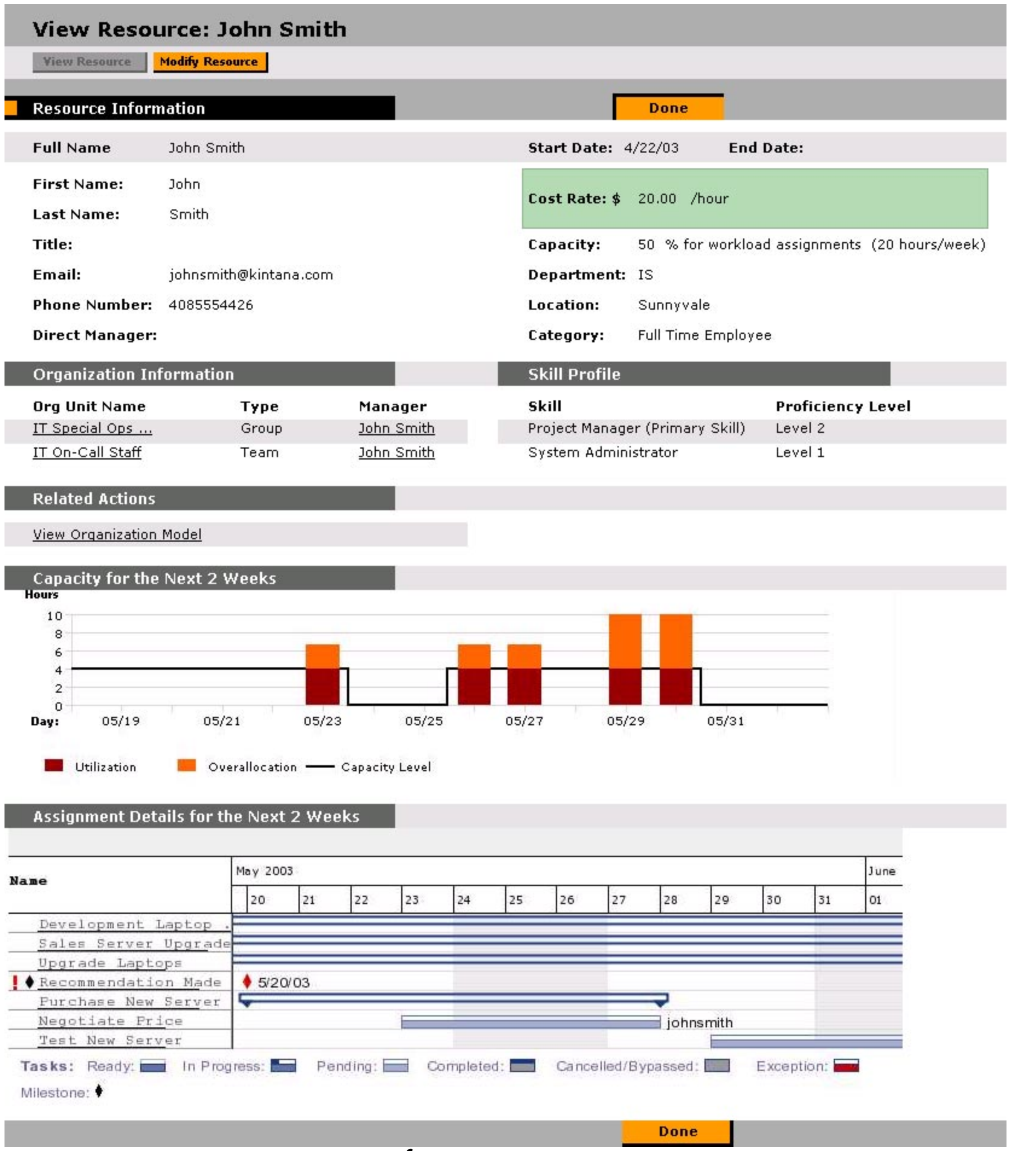


Figure 6-4 View My Resource Information page

Of particular interest are the visualizations at the bottom of the page:

- CAPACITY FOR THE NEXT 2 WEEKS — Charts the Resource's capacity against their current assignments, and shows areas of over-allocation. Non-Workload assignments are omitted.
- ASSIGNMENT DETAILS FOR THE NEXT 2 WEEKS — A Gantt chart that displays all of the Resource's assignments, as well as showing Task Exceptions.

Note

Depending on the Resource's level of access, some information may not be displayed, such as Cost data.

Both of these visualizations are also available as portlets.

The Analyze Assignment Load portlet pictured in *Figure 6-5* can be personalized to display only allocations for one Resource. For more detailed information on the Analyze Assignment Load visualization, see *"Visualizing Assignments"* on page 102.

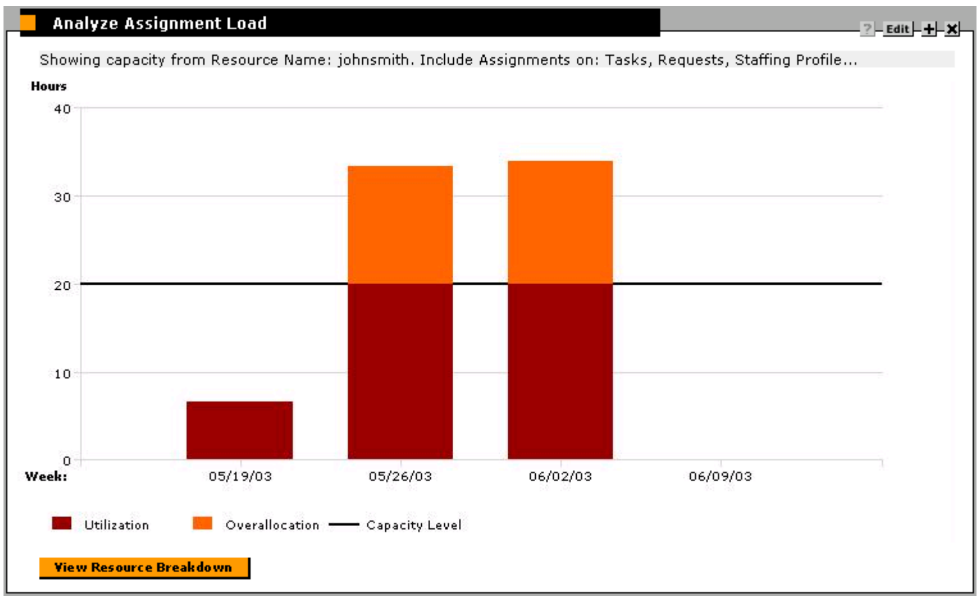


Figure 6-5 Analyze Assignment Load portlet

The Resource Gantt portlet pictured in *Figure 6-6* can be personalized to display only allocations for one Resource.

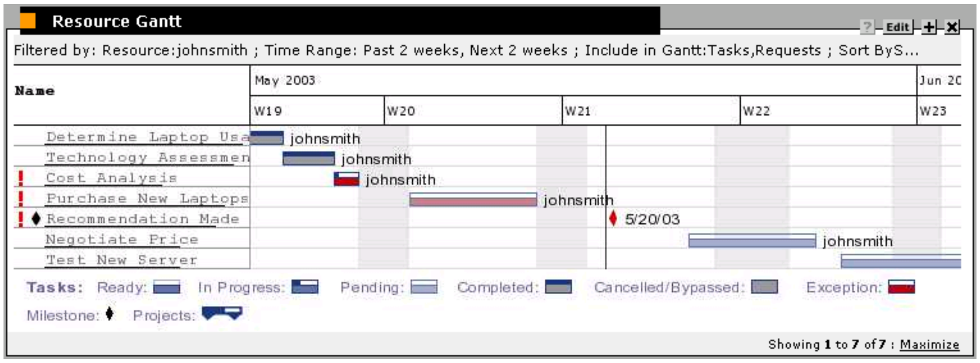


Figure 6-6 Resource Gantt portlet

Visualizing Assignments

A basic task for Project managers and Request managers is to ensure that Work Items are assigned to their team members without overloading anyone. This task of balancing the assignments of all Resources is called load balancing.

The ANALYZE ASSIGNMENT LOAD page provides a tool for visualizing assignments that allows a manager to view workload sorted according to different criteria and levels of specificity, giving them better control and visibility over their Resources’ workload.

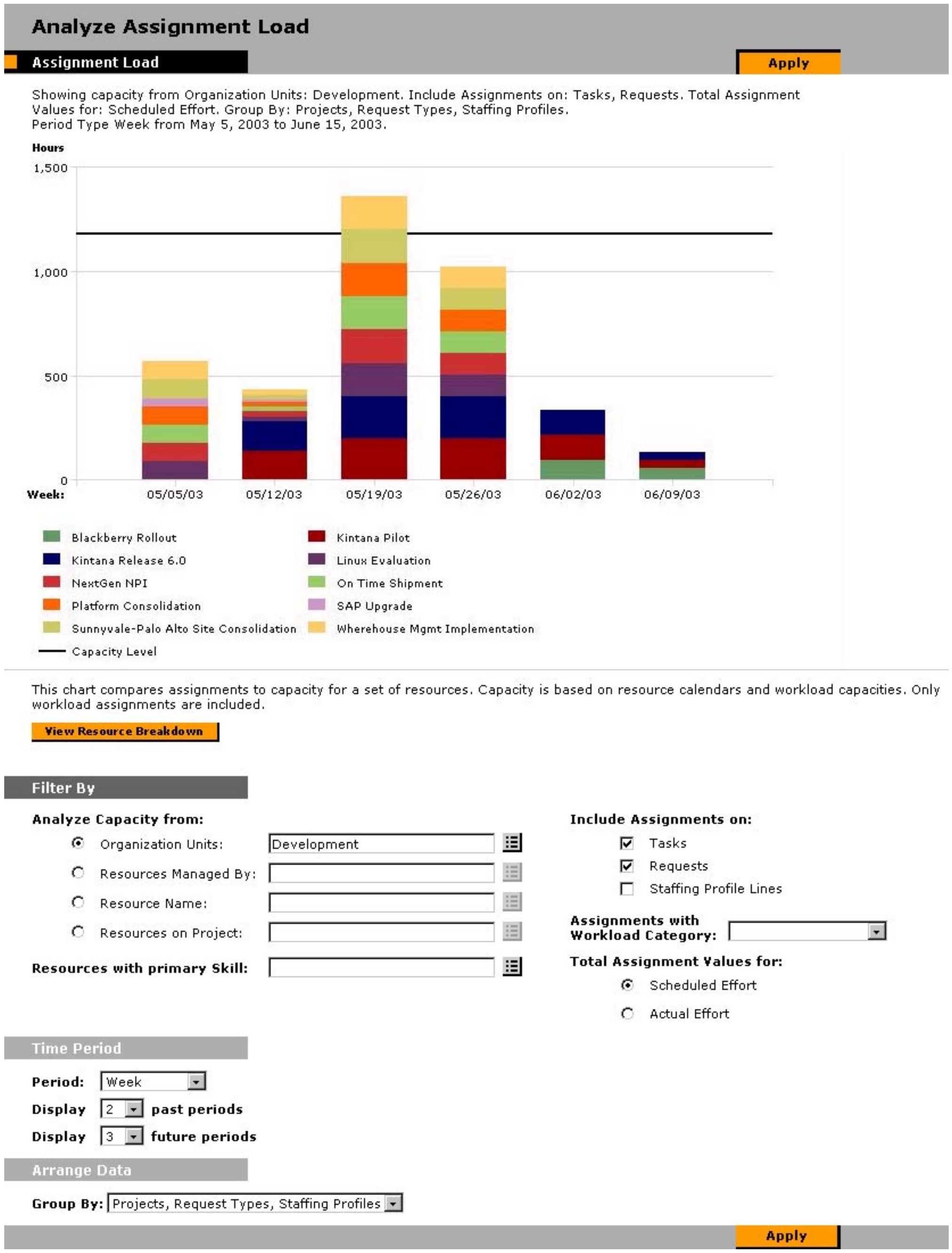


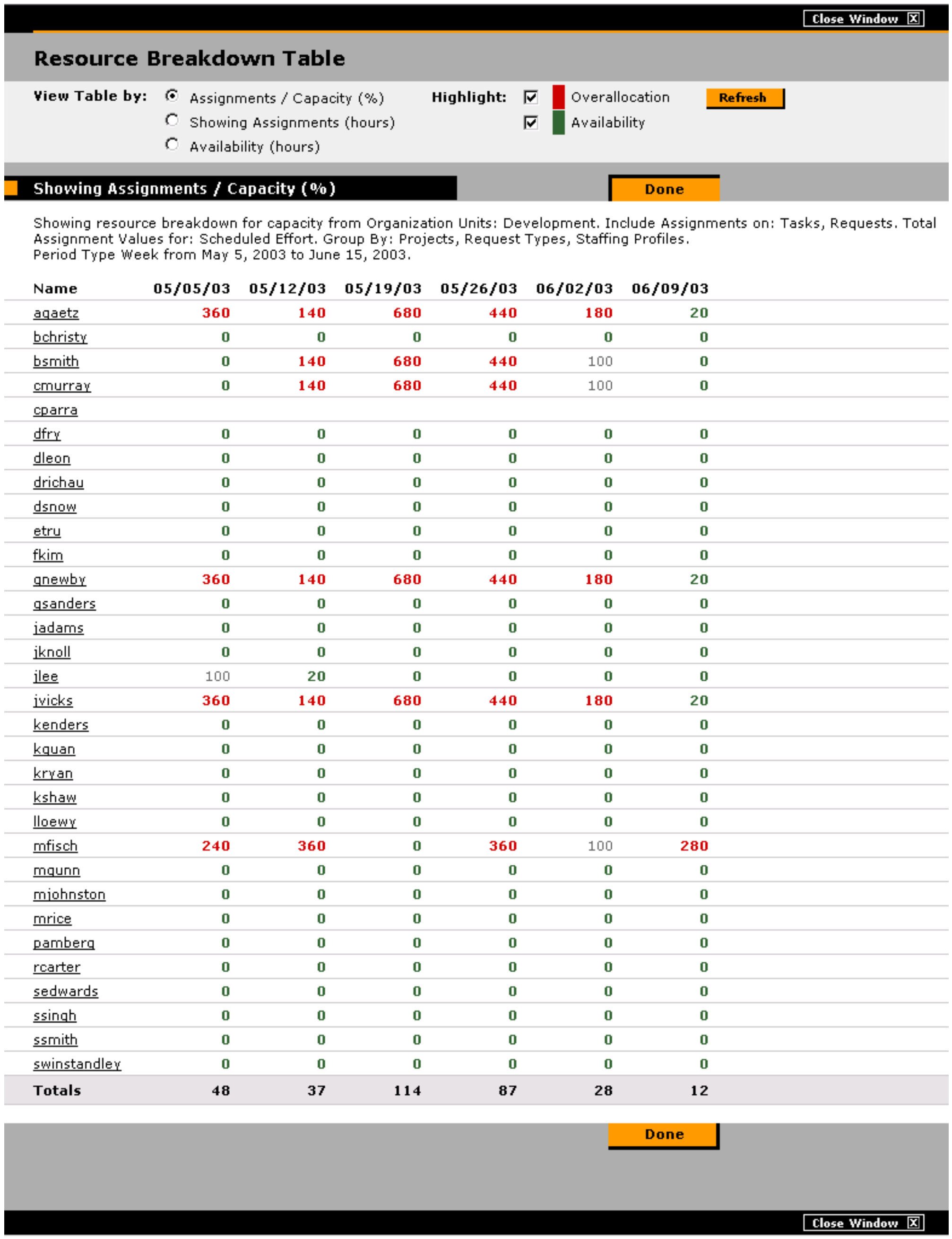
Figure 6-7 Analyze Assignment Load page

The ANALYZE ASSIGNMENT LOAD page can be filtered according to the parameters described in *Table 6-2*.

Table 6-2. Analyze Assignment Load page - Parameters

Field	Description
Filter By	
Analyze Capacity From	A choice of multi-select auto-complete fields that selects the sets of Resources to display in the Analyze Assignment Load page. Possible choices: **Organization Units**, **Resources Managed By**, **Resource Name**, **Resources on Project**
Include Assignments On	Chooses whether to include **Tasks**, **Requests**, and/or **Staffing Profile Lines** in the visualization.
Assignments with Workload Category	Selects assignments of a specific Workload Category to display.
Resources with Primary Skill	A multi-select auto-complete field that selects a Skill or set of Skills to display from the sets of Resources being analyzed.
Total Assignment Values for	Sets whether to display **Scheduled** or **Actual Effort** in the Analyze Assignment Load page.
Time Period	
Period	Sets the time period being used by the Analyze Assignment Load page.
Display (x) past periods	Selects up to 20 time periods before the current date to include in the Analyze Assignment Load page. Useful for viewing historical trends.
Display (x) future periods	Selects up to 20 time periods after the current date to include in the Analyze Assignment Load page.
Arrange Data	
Group By	Chooses a category or set of categories to group the data by. Possible choices: **Projects, Request Types, Staffing Profiles**; **Skills**; **None**

To get a breakdown of total Resource capacity, click **View Resource Breakdown.** The Resource Breakdown Table, pictured in *Figure 6-8*, opens in a new window.



Name	05/05/03	05/12/03	05/19/03	05/26/03	06/02/03	06/09/03
agaetz	360	140	680	440	180	20
bchristy	0	0	0	0	0	0
bsmith	0	140	680	440	100	0
cmurray	0	140	680	440	100	0
cparra						
dfry	0	0	0	0	0	0
dleon	0	0	0	0	0	0
drichau	0	0	0	0	0	0
dsnow	0	0	0	0	0	0
etru	0	0	0	0	0	0
fkim	0	0	0	0	0	0
gnewby	360	140	680	440	180	20
gsanders	0	0	0	0	0	0
iadams	0	0	0	0	0	0
jknoll	0	0	0	0	0	0
jlee	100	20	0	0	0	0
jvicks	360	140	680	440	180	20
kenders	0	0	0	0	0	0
kquan	0	0	0	0	0	0
kryan	0	0	0	0	0	0
kshaw	0	0	0	0	0	0
lloewy	0	0	0	0	0	0
mfisch	240	360	0	360	100	280
mgunn	0	0	0	0	0	0
mjohnston	0	0	0	0	0	0
mrice	0	0	0	0	0	0
pamberg	0	0	0	0	0	0
rcarter	0	0	0	0	0	0
sedwards	0	0	0	0	0	0
ssingh	0	0	0	0	0	0
ssmith	0	0	0	0	0	0
swinstandley	0	0	0	0	0	0
Totals	48	37	114	87	28	12

Figure 6-8 Resource Breakdown Table

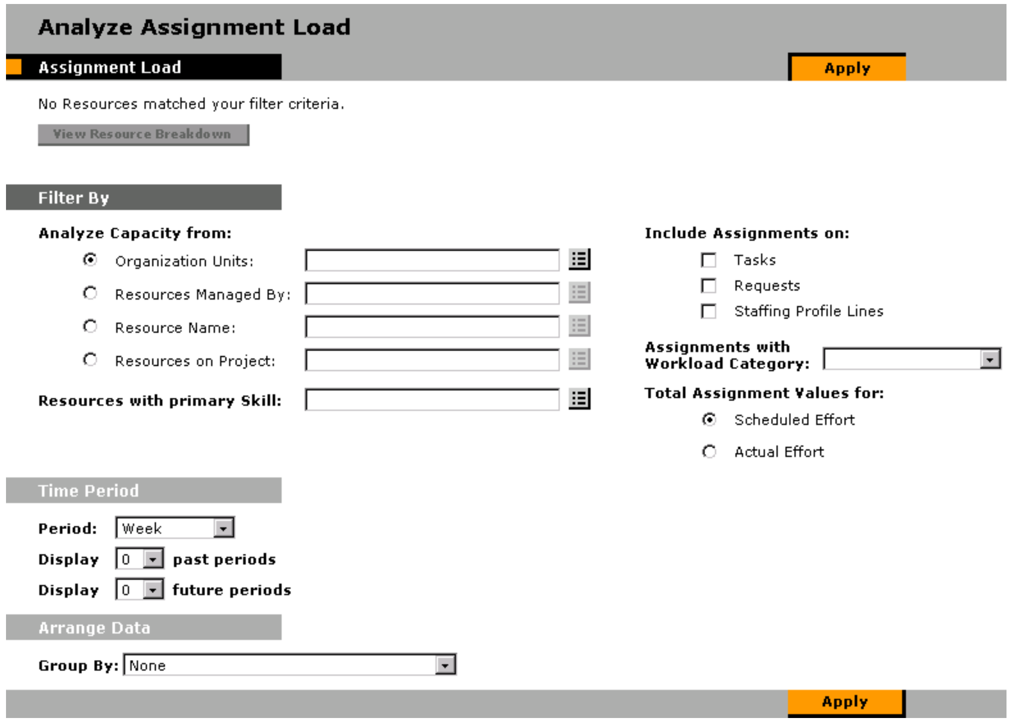
The Resource Breakdown Table itself can be filtered to show different data according to the parameters described in *Table 6-3*.

Table 6-3. Resource Breakdown Table - Parameters

Field	Description
VIEW TABLE BY	Chooses the data to display in the table. **ASSIGNMENTS/CAPACITY (%)** — Shows each Resource's assignments as a percentage of their WORKLOAD CAPACITY. **SHOWING ASSIGNMENTS (HOURS)** — Shows each Resource's assignment total in working hours. **AVAILABILITY (HOURS)** — Shows each Resource's total available working hours.
HIGHLIGHT	Chooses whether to highlight **OVERALLOCATION** (red numbers) or **AVAILABILITY** (green numbers) in the table.
REFRESH	Refreshes the table. Click **REFRESH** after making a choice in VIEW TABLE BY or HIGHLIGHT.

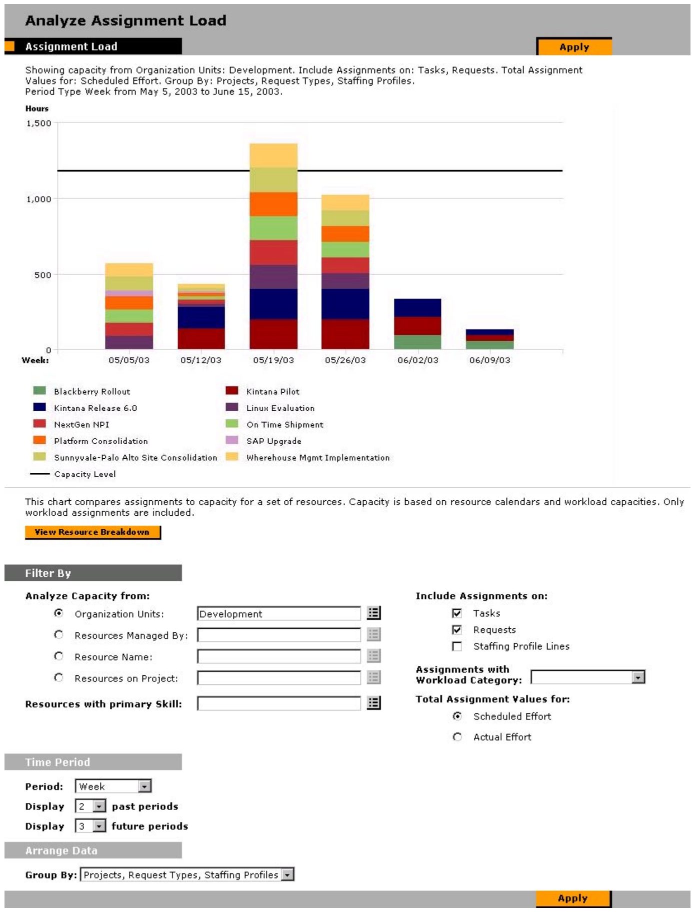
To use the ANALYZE ASSIGNMENT LOAD page:

1. Log onto Kintana.
2. Select **RESOURCE -> ANALYZE -> ASSIGNMENT LOAD** from the navigation bar. The ANALYZE ASSIGNMENT LOAD page opens with no graph.



3. Select any desired filter criteria and click **APPLY**.

4. The ANALYZE ASSIGNMENT LOAD page reloads, displaying the filtered data.



5. To view a different set of data or refine your filter criteria, change any of the desired fields and click **APPLY** again.

   To view the RESOURCE BREAKDOWN table for the displayed graph, click **VIEW RESOURCE BREAKDOWN.**

With the visualizations available from the ANALYZE ASSIGNMENT LOAD page, you can see areas of Resource overallocation or under-utilization, broken down by any number of filter criteria. You can use the graphs as a guide to help balance workload among Resources. Data from the RESOURCE BREAKDOWN table can be copied and pasted into a spreadsheet program like Microsoft Excel for further manipulation.

Appendix A Useful Screens

The bulk of Kintana Resource Management's functionality resides in the Kintana interface. This appendix defines commonly used Resource Management pages and fields in the Kintana interface, arranged into the following sections for ease of navigation:

- *Resources and Organization Model*
- *Resource Pools and Staffing Profiles*
- *Analysis Pages*

Resources and Organization Model

The following pages and fields in the Kintana interface deal with Resources and the Organization model in Kintana:

- *Search Resources Page*
- *Modify Resources Page*
- *Search Skills Page*
- *Modify Skills Page*
- *View Organization Model Page*
- *Create New Organization Unit Page*
- *View Organization Unit Page*

Search Resources Page

The SEARCH RESOURCES page is used to locate Resources to view. Access the SEARCH RESOURCES page by selecting **SEARCH -> RESOURCES** from the navigation bar. Clicking on a Resource name in the SELECT RESOURCES TO VIEW section opens that Resource's VIEW RESOURCE page.

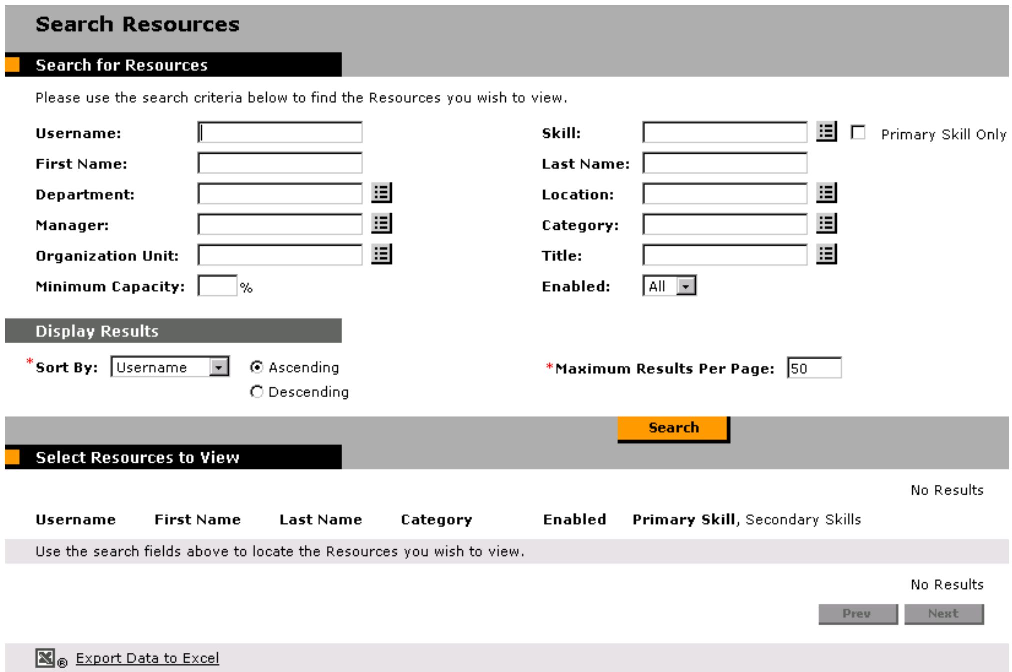


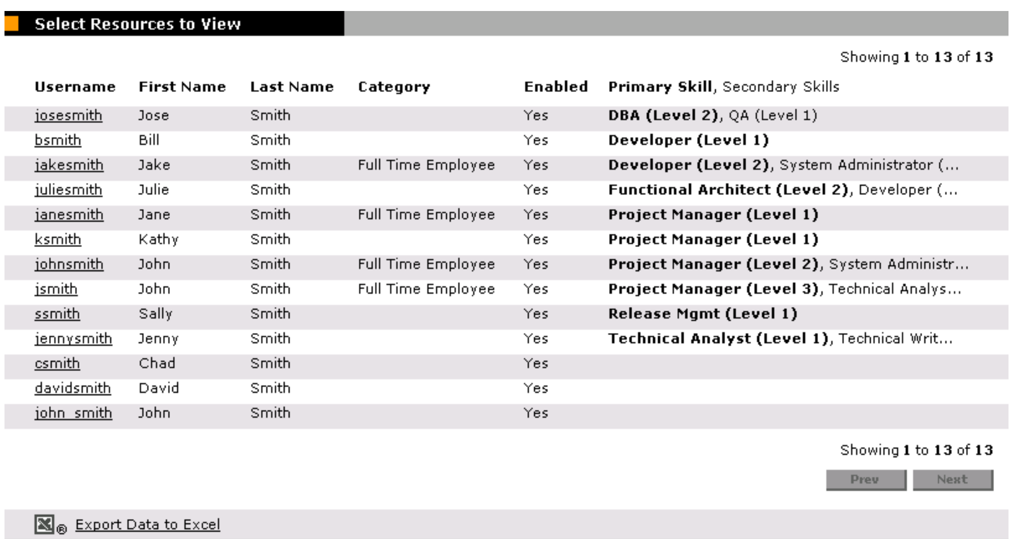
Figure A-1 Search Resources Page

Table A-1. Search Resources Page - Parameters

Field	Description
USERNAME	Searches for Resources by Kintana username.
SKILL	Searches for Resources by Skill.
PRIMARY SKILL ONLY	Only searches for Resources whose Primary Skill is the SKILL specified.
FIRST NAME	Searches for Resources by first name.
LAST NAME	Searches for Resources by last name.
DEPARTMENT	Searches for Resources by department.
LOCATION	Searches for Resources by location.
MANAGER	Searches for Resources by Manager.
CATEGORY	Searches for Resources by category.

Table A-1. Search Resources Page - Parameters

Field	Description
Organization Unit	Searches for Resources by Organization Unit.
Title	Searches for Resources by title.
Minimum Capacity	Searches for Resources by minimum Workload Capacity.
Enabled	Only searches for enabled Resources.
Sort By	Sets the order of search results. Possible choices: **Username**, **First Name**, **Last Name**, **Category**, **Primary Skill**.
Ascending/Descending	Arranges the search results in ascending or descending order.
Maximum Results Per Page	Sets the maximum number of Resources to display per page.
Search	Initiates the search.
Export Data to Excel	Exports the search results to a Microsoft Excel spreadsheet, which opens in a separate window.



Select Resources to View

Showing **1** to **13** of **13**

Username	First Name	Last Name	Category	Enabled	Primary Skill, Secondary Skills
josesmith	Jose	Smith		Yes	**DBA (Level 2)**, QA (Level 1)
bsmith	Bill	Smith		Yes	**Developer (Level 1)**
jakesmith	Jake	Smith	Full Time Employee	Yes	**Developer (Level 2)**, System Administrator (...
juliesmith	Julie	Smith		Yes	**Functional Architect (Level 2)**, Developer (...
janesmith	Jane	Smith	Full Time Employee	Yes	**Project Manager (Level 1)**
ksmith	Kathy	Smith		Yes	**Project Manager (Level 1)**
johnsmith	John	Smith	Full Time Employee	Yes	**Project Manager (Level 2)**, System Administr...
jsmith	John	Smith	Full Time Employee	Yes	**Project Manager (Level 3)**, Technical Analys...
ssmith	Sally	Smith		Yes	**Release Mgmt (Level 1)**
jennysmith	Jenny	Smith		Yes	**Technical Analyst (Level 1)**, Technical Writ...
csmith	Chad	Smith		Yes	
davidsmith	David	Smith		Yes	
john_smith	John	Smith		Yes	

Showing **1** to **13** of **13**

Prev Next

Export Data to Excel

Figure A-2 Search Resources Page - Results section example

Resource Search Results

Exported from Kitnana on: May 20, 2003 11:51 AM PDT

Username	First Name	Last Name	Category	Enabled	Primary Skill, Secondary Skills
josesmith	Jose	Smith		Yes	**DBA (Level 2)**, QA (Level 1)
bsmith	Bill	Smith		Yes	**Developer (Level 1)**
jakesmith	Jake	Smith	Full Time Employee	Yes	**Developer (Level 2)**, System Administrator (Level 1)
juliesmith	Julie	Smith		Yes	**Functional Architect (Level 2)**, Developer (Level 1), Release Mgmt (Level 1)
janesmith	Jane	Smith	Full Time Employee	Yes	**Project Manager (Level 1)**
ksmith	Kathy	Smith		Yes	**Project Manager (Level 1)**
johnsmith	John	Smith	Full Time Employee	Yes	**Project Manager (Level 2)**, System Administrator (Level 1)
jsmith	John	Smith	Full Time Employee	Yes	**Project Manager (Level 3)**, Technical Analyst (Level 4)
ssmith	Sally	Smith		Yes	**Release Mgmt (Level 1)**
jennysmith	Jenny	Smith		Yes	**Technical Analyst (Level 1)**, Technical Writer (Level 1)
csmith	Chad	Smith		Yes	
davidsmith	David	Smith		Yes	
john_smith	John	Smith		Yes	

ResourceSearchExcelExport.jsp e

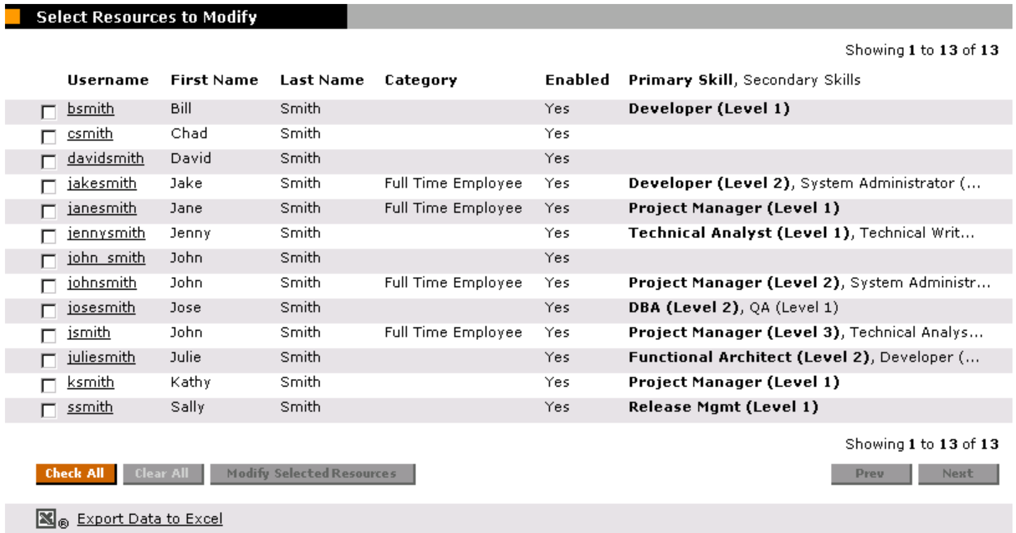
Figure A-3 Search Resources Page - Results example Excel spreadsheet

Modify Resources Page

The MODIFY RESOURCES page is used to locate Resources to modify. Access the MODIFY RESOURCES page by selecting **RESOURCE -> RESOURCES -> MODIFY RESOURCES** from the navigation bar.

The MODIFY RESOURCES page looks and functions identically to the *Search Resources Page* with the following exceptions:

- Clicking on a Resource name in the SELECT RESOURCES TO MODIFY section opens that Resource's MODIFY RESOURCE page.
- You can modify multiple Resources at once by selecting the check box next to each Resource Name and clicking **MODIFY SELECTED RESOURCES**. See *Modify Resource Attributes for Selected Resources Page* for more details.



Select Resources to Modify

Showing **1** to **13** of **13**

	Username	First Name	Last Name	Category	Enabled	**Primary Skill**, Secondary Skills
☐	bsmith	Bill	Smith		Yes	**Developer (Level 1)**
☐	csmith	Chad	Smith		Yes	
☐	davidsmith	David	Smith		Yes	
☐	jakesmith	Jake	Smith	Full Time Employee	Yes	**Developer (Level 2)**, System Administrator (...
☐	janesmith	Jane	Smith	Full Time Employee	Yes	**Project Manager (Level 1)**
☐	jennysmith	Jenny	Smith		Yes	**Technical Analyst (Level 1)**, Technical Writ...
☐	john_smith	John	Smith		Yes	
☐	johnsmith	John	Smith	Full Time Employee	Yes	**Project Manager (Level 2)**, System Administr...
☐	josesmith	Jose	Smith		Yes	**DBA (Level 2)**, QA (Level 1)
☐	jsmith	John	Smith	Full Time Employee	Yes	**Project Manager (Level 3)**, Technical Analys...
☐	juliesmith	Julie	Smith		Yes	**Functional Architect (Level 2)**, Developer (...
☐	ksmith	Kathy	Smith		Yes	**Project Manager (Level 1)**
☐	ssmith	Sally	Smith		Yes	**Release Mgmt (Level 1)**

Showing **1** to **13** of **13**

Check All | Clear All | Modify Selected Resources | Prev | Next

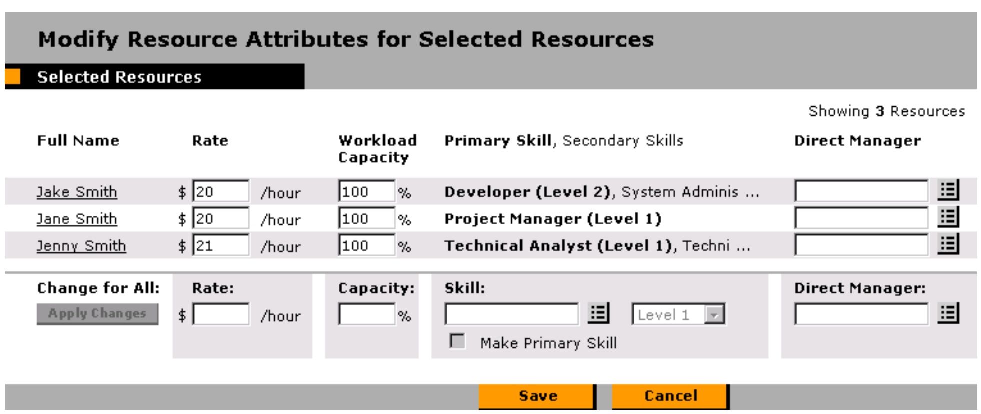
Export Data to Excel

Figure A-4 Modify Resources Page - Results section example

Modify Resource Attributes for Selected Resources Page

The MODIFY RESOURCE ATTRIBUTES FOR SELECTED RESOURCES page allows you to modify attributes for many Resources simultaneously. This page opens when you select multiple Resources from the MODIFY RESOURCES page and click **MODIFY SELECTED RESOURCES.**

- Each Resource's RATE, WORKLOAD CAPACITY, and DIRECT MANAGER can be modified individually.
- You can also update all listed Resources' RATE, WORKLOAD CAPACITY, and DIRECT MANAGER simultaneously using the CHANGE FOR ALL row.



Modify Resource Attributes for Selected Resources

Selected Resources

Showing **3** Resources

Full Name	Rate	Workload Capacity	**Primary Skill**, Secondary Skills	Direct Manager
Jake Smith	$ 20 /hour	100 %	**Developer (Level 2)**, System Adminis ...	
Jane Smith	$ 20 /hour	100 %	**Project Manager (Level 1)**	
Jenny Smith	$ 21 /hour	100 %	**Technical Analyst (Level 1)**, Techni ...	
Change for All: Apply Changes	**Rate:** $ /hour	**Capacity:** %	**Skill:** Level 1 ☐ Make Primary Skill	**Direct Manager:**

Save | Cancel

Figure A-5 Modify Resource Attributes for Selected Resources Page

Search Skills Page

The Search Skills page is used to locate Skills to view. Access the Search Skills page by selecting **Search -> Skills** from the navigation bar. Clicking on a Skill name in the Select Skill to View section opens that Skill's View Skill page.

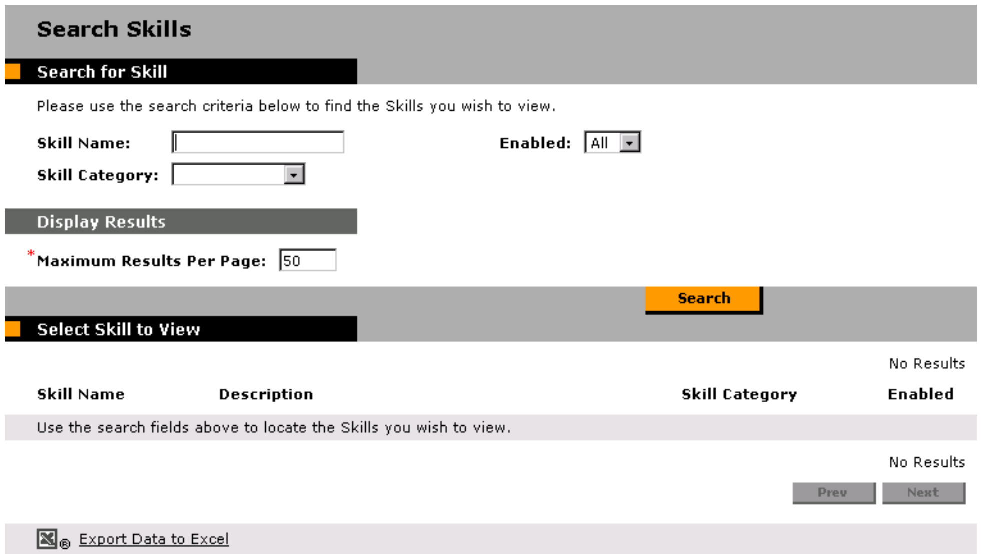


Figure A-6 Search Skills Page

Table A-2. Search Skills Page - Parameters

Field	Description
Skill Name	Searches for Skills by Name.
Enabled	Only searches for enabled Skills.
Skill Category	Searches for Skills by Category.
Maximum Results Per Page	Sets the maximum number of Skills to display per page.
Search	Initiates the search.
Export Data to Excel	Exports the search results to a Microsoft Excel spreadsheet, which opens in a separate window.

Modify Skills Page

The Modify Skills page is used to locate Skills to modify. Access the Modify Skills page by selecting **Resource -> Skills -> Modify Skills** from the navigation bar.

The MODIFY SKILLS page looks and functions identically to the *Search Skills Page* with the following exceptions:

- Clicking on a Skills name in the SELECT SKILLS TO MODIFY section opens that Resource's MODIFY SKILL page.
- You can delete Skills by selecting the check box next to the Skill Name and clicking **DELETE**.
- You can create new Skills by clicking **CREATE NEW SKILL**.

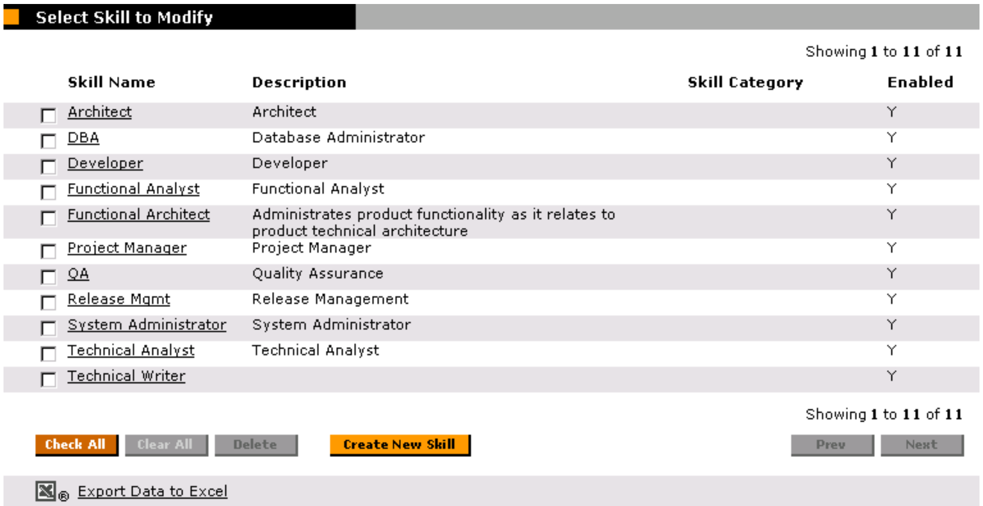


Figure A-7 Modify Skills Page - Results section example

View Organization Model Page

The VIEW ORGANIZATION MODEL page displays the Organization Model. To view the Organization Model, select **RESOURCE -> ORGANIZATION MODEL -> BROWSE THE ORG MODEL** from the navigation bar.

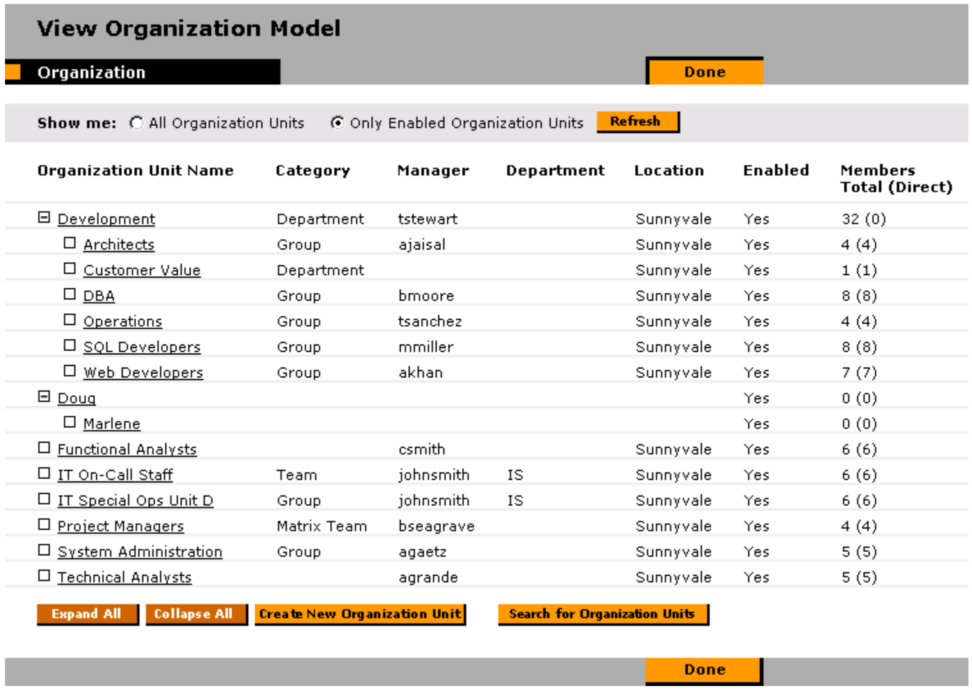


Figure A-8 View Organization Model Page

Table A-3. View Organization Model Page - Controls

Field	Description
SHOW ME	Allows you to choose between displaying **ALL ORGANIZATION UNITS** or **ONLY ENABLED ORGANIZATION UNITS**.
REFRESH	Refreshes the VIEW ORGANIZATION MODEL page after you have made a SHOW ME choice.
(PLUS BUTTON)	Expands a tree in the Organization Unit list.
(MINUS BUTTON)	Collapses a tree in the Organization Unit list.
EXPAND ALL	Expands all trees in the Organization Unit list.
COLLAPSE ALL	Collapses all trees in the Organization Unit list.
CREATE NEW ORGANIZATION UNIT	Opens the CREATE NEW ORGANIZATION UNIT page. The currently-selected Organization Unit is defaulted as the parent of the new Organization Unit.
SEARCH FOR ORGANIZATION UNITS	Opens the MODIFY ORGANIZATION UNITS page.
DONE	Returns you to the last Dashboard page you visited.

Create New Organization Unit Page

The CREATE NEW ORGANIZATION UNIT page is used to create a new Organization Unit. Open the CREATE NEW ORGANIZATION UNIT page by selecting **CREATE -> ORGANIZATION UNIT** from the navigation bar, or clicking **CREATE NEW ORGANIZATION UNIT** from the *View Organization Model Page*.

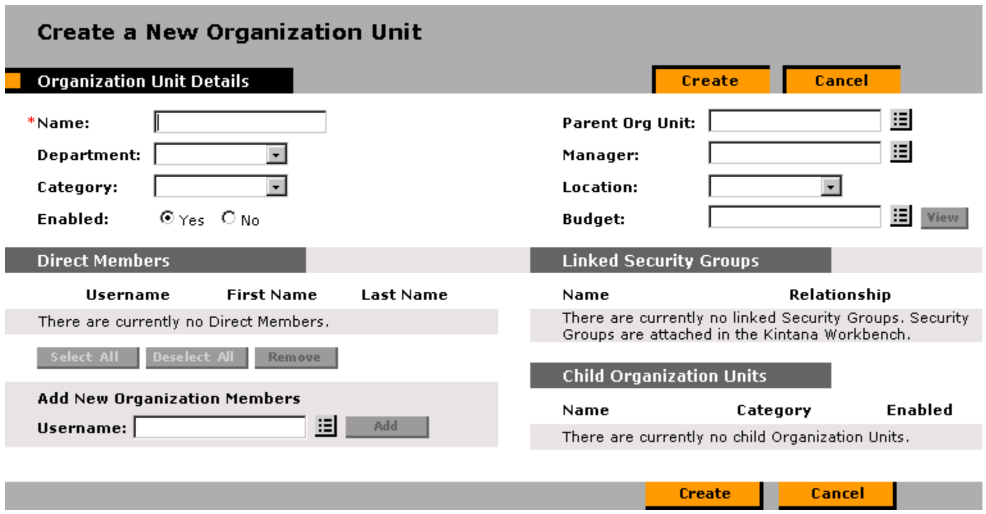


Figure A-9 Create New Organization Unit Page

Table A-4. Create New Organization Page - Fields

Field	Description
Organization Unit Details	
NAME	The name of the Organization Unit.
PARENT ORG UNIT	The Organization Unit, if any, with direct authority over the current Organization Unit.
DEPARTMENT	The department the Organization Unit is part of.
MANAGER	The manager of the Organization Unit.
CATEGORY	The category of the Organization Unit.
LOCATION	The location of the Organization Unit.
ENABLED	Whether or not the Organization Unit is enabled.
BUDGET	The Budget for the Organization Unit. If this field has a value, click VIEW to view the specified Budget.
Direct Members	
SELECT ALL	Selects all of the Resources in the Organization Unit's member list.

Table A-4. Create New Organization Page - Fields

Field	Description
DESELECT ALL	Deselects all of the Resources in the Organization Unit's member list.
REMOVE	Removes the selected Resources in the Organization Unit's member list.
USERNAME	A multi-select auto-complete field that lets you choose Resources to add to the Organization Unit.
ADD	Adds the Resources chosen in the USERNAME field to the Organization Unit's member list.
LINKED SECURITY GROUPS	Lists any Security Groups associated with the Organization Unit. Associating a Security Group with an Organization Unit is done in the Kintana Workbench interface.
CHILD ORGANIZATION UNITS	Lists any Organization Units that the current Organization Unit has direct authority over.
CREATE	Creates the Organization Unit.
CANCEL	Returns you to the last Dashboard page you visited without creating the Organization Unit.

View Organization Unit Page

The VIEW ORGANIZATION UNIT page displays an Organization Unit's details and links to other information such as child Organization Units or associated Security Groups.

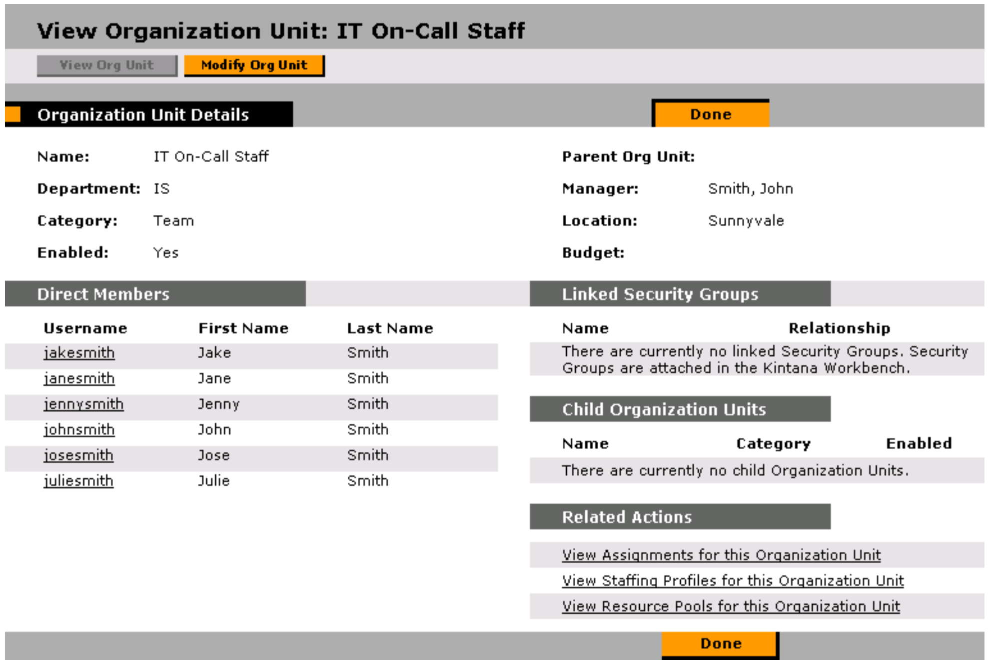


Figure A-10 View Organization Unit Page

Table A-5. View Organization Unit Page - Fields

Field	Description
Organization Unit Details	
Name	The name of the Organization Unit.
Parent Org Unit	The Organization Unit, if any, with direct authority over the current Organization Unit.
Department	The department the Organization Unit is part of.
Manager	The manager of the Organization Unit.
Category	The category of the Organization Unit.
Location	The location of the Organization Unit.
Enabled	Whether or not the Organization Unit is enabled.
Budget	The Budget for the Organization Unit.
Direct Members	Lists all the members of the Organization Unit. Clicking on a Username opens the Resource's View Resource page.
Linked Security Groups	Lists any Security Groups, if any, associated with the Organization Unit. Clicking on a Security Group Name opens the Security Group in the Kintana Workbench interface.

Table A-5. View Organization Unit Page - Fields

Field	Description
CHILD ORGANIZATION UNITS	Lists any Organization Units, if any, that the current Organization Unit has direct authority over. Clicking on the Child Organization Unit NAME opens its VIEW ORGANIZATION UNIT page.
RELATED ACTIONS	Lists links to useful visualizations related to the Organization Unit. **VIEW ASSIGNMENTS FOR THIS ORGANIZATION UNIT** — Opens the ANALYZE ASSIGNMENT LOAD page with the Organization Unit already loaded. **VIEW STAFFING PROFILES FOR THIS ORGANIZATION UNIT** — Opens the SEARCH STAFFING PROFILES page, listing any Staffing Profiles that use this Organization Unit. **VIEW RESOURCE POOLS FOR THIS ORGANIZATION UNIT** — Opens the SEARCH RESOURCE POOLS, listing any Resource Pools that use this Organization Unit.

Resource Pools and Staffing Profiles

The following pages and fields in the Kintana interface deal with Resource Pools and Staffing Profiles in Kintana:

- *Create a New Resource Pool Pages*
- *Search Resource Pools Page*
- *Modify Resource Pools Page*
- *Create a New Staffing Profile Pages*
- *Search Staffing Profiles Page*
- *Modify Staffing Profiles Page*

Create a New Resource Pool Pages

Resource Pools are created in two steps. The first CREATE A NEW RESOURCE POOL page, pictured in *Figure A-11*, is opened by selecting **CREATE -> RESOURCE POOL** or **RESOURCE -> RESOURCE POOLS -> CREATE A RESOURCE POOL** from the navigation bar.

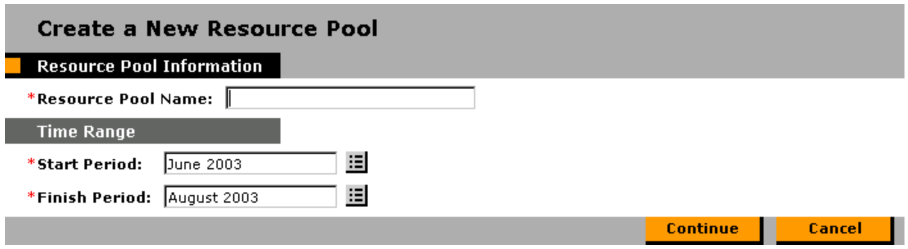


Figure A-11 Create a New Resource Pool Page - Name and Periods

Table A-6. Create a New Resource Pool Page - Name and Periods - Fields

Field	Description
RESOURCE POOL NAME	The name of the Resource Pool.
START PERIOD	The first time period the Resource Pool accounts for.
FINISH PERIOD	The last time period the Resource Pool accounts for.
CONTINUE	Continues to the next CREATE A NEW RESOURCE POOL page.
CANCEL	Returns you to the last Dashboard page you visited without creating the Resource Pool.

Clicking **CONTINUE** opens the second CREATE A NEW RESOURCE POOL page.

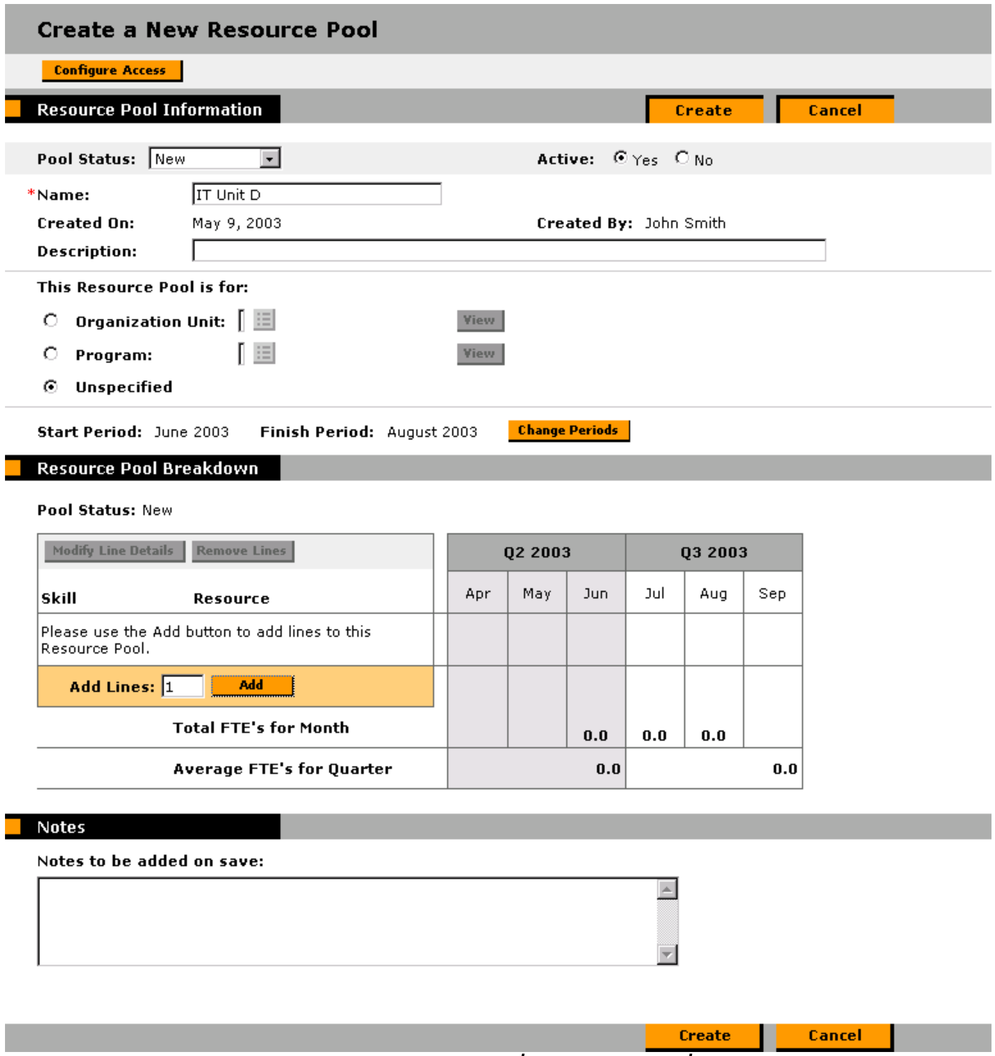


Figure A-12 Create a New Resource Pool Page - Details

Table A-7. Create a New Resource Pool Page - Details - Fields

Field	Description
Resource Pool Information	
POOL STATUS	The status of the Resource Pool. Possible values: **NEW**, **PROPOSED**, **UNDER REVIEW**, **IN REWORK**, **ON HOLD**, **APPROVED**, **REJECTED**, **CANCELLED**, **CLOSED**
ACTIVE	Whether or not the Resource Pool is active. Inactive Resource Pools are not included in Resource Management visualizations.
NAME	The name of the Resource Pool.

Table A-7. Create a New Resource Pool Page - Details - Fields

Field	Description
CREATED ON	Read only. The date the Resource Pool was created.
CREATED BY	Read only. The user who created the Resource Pool.
DESCRIPTION	A description of the Resource Pool.
THIS RESOURCE POOL IS FOR	Defines whether the Resource Pool is associated with an ORGANIZATION UNIT, a PROGRAM (if Kintana PMO Solution is installed), or UNSPECIFIED.
START PERIOD	The starting period defined previously for the Resource Pool.
FINISH PERIOD	The ending period defined previously for the Resource Pool.
CHANGE PERIODS	Allows you to change the periods for the Resource Pool.
Resource Pool Breakdown	
MODIFY LINE DETAILS	If any Resource Pool lines exist and have been selected, opens a page that allows you to change details for the selected lines.
REMOVE LINES	If any Resource Pool lines exist and have been selected, removes the selected lines from the Resource Pool.
SKILL	The Skill being projected. Each Resource Pool line can hold one Skill.
RESOURCE	The Resource for the Skill. Each Resource Pool line can hold one Resource per Skill.
ADD LINES	Specifies a number of lines to add to the Resource Pool.
ADD	Opens the ADD LINES TO RESOURCE POOL page with the specified number of blank lines loaded.
TOTAL FTE'S FOR MONTH	The total Full Time Equivalents for each month being projected in the Resource Pool.
AVERAGE FTE'S FOR QUARTER	The average Full Time Equivalents per quarter being projected in the Resource Pool.
NOTES	Any notes on the Resource Pool itself.
CREATE	Creates the Resource Pool.
CANCEL	Returns you to the last Dashboard page you visited without creating the Resource Pool.

Add Lines to Resource Pool Page

When you enter a value into the ADD LINES field in the second CREATE A NEW RESOURCE POOL page and click **ADD**, the ADD LINES TO RESOURCE POOL page opens, requesting details for the Resource Pool lines you are adding.

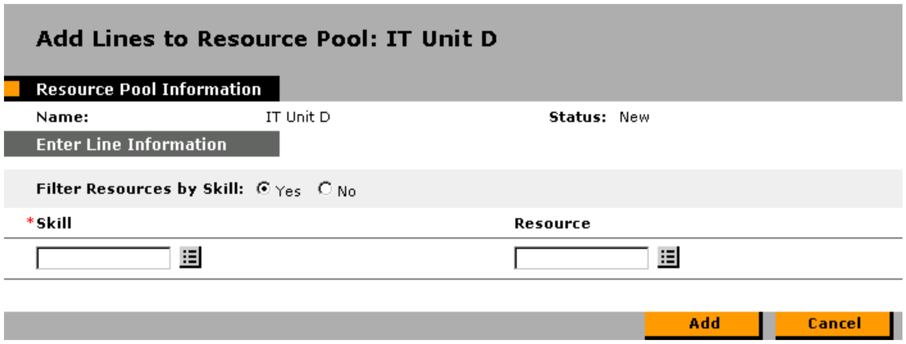


Figure A-13 Add Lines to Resource Pool Page (one line)

Table A-8. Add Lines to Resource Pool Page- Fields

Field	Description
Filter Resources by Skill	Decides whether or not only Resources with the specified Skill will appear in the Resource field once a Skill has been specified.
Skill	The Skill being tracked by the Resource Pool.
Resource	The Resource being tracked by the Resource Pool. If Filter Resources by Skill is set to **No**, the Resource may not necessarily have the Skill specified.
Add	Adds the line(s) to the Resource Pool.
Cancel	Returns to the Create a New Resource Pool page without adding the lines.

Search Resource Pools Page

The Search Resource Pools page is used to locate Resource Pools to view. Access the Search Resource Pools page by selecting **Search -> Resource Pools** from the navigation bar. Clicking on a Resource Pool name in the Select Resource Pool to View section opens that Resource Pool's View Resource Pool page.

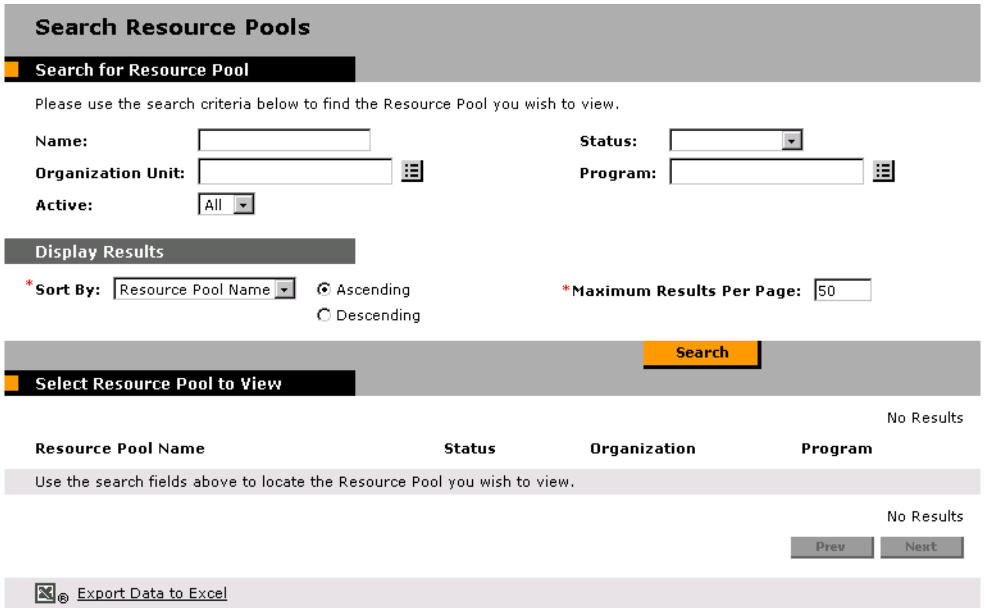


Figure A-14 Search Resource Pools Page

Table A-9. Search Resource Pools Page - Parameters

Field	Description
NAME	Searches for Resource Pools by name.
STATUS	Searches for Resource Pools by Status.
ORGANIZATION UNIT	Searches for Resource Pools by attached Organization Unit.
PROGRAM	Searches for Resource Pools by associated Program (only appears if you have installed the Kintana Program Management Office Solution)
ACTIVE	Searches for Resource Pools by whether or not they are active.
SORT BY	Sets the order of search results. Possible values: **RESOURCE POOL NAME**, **STATUS**, **ORGANIZATION**, or **PROGRAM**.
ASCENDING/DESCENDING	Arranges the search results in ascending or descending order.
MAXIMUM RESULTS PER PAGE	Sets the maximum number of Resource Pools to display per page.
SEARCH	Initiates the search.
EXPORT DATA TO EXCEL	Exports the search results to a Microsoft Excel spreadsheet, which opens in a separate window.

Modify Resource Pools Page

The Modify Resource Pools page is used to locate Resource Pools to modify. Access the Modify Resource Pools page by selecting **Resource -> Resource Pools -> Modify Resource Pools** from the navigation bar.

The Modify Resource Pools page looks and functions identically to the *Search Resource Pools Page* with the following exceptions:

- Clicking on a Resource Pool name in the Select Resource Pool to Modify section opens that Resource Pool's Modify Resource Pool page.
- You can delete Resource Pools by selecting the check box next to the Resource Pool Name and clicking **Delete**.
- You can create new Resource Pools by clicking **Create New Resource Pool**.

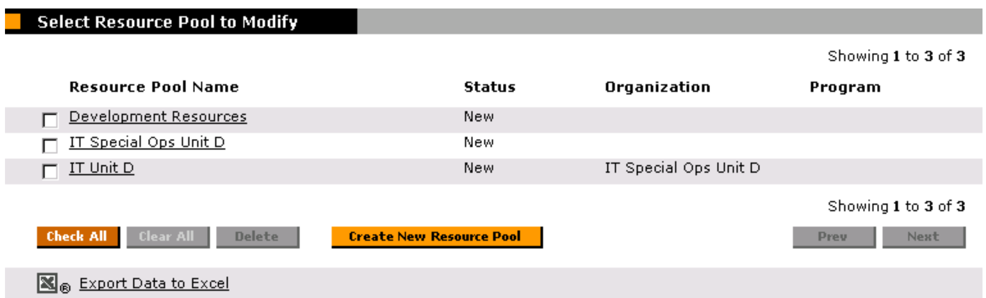


Figure A-15 Modify Resource Pools Page - Results section example

Create a New Staffing Profile Pages

Staffing Profiles are created in two steps. The first Create a New Staffing Profile page, pictured in *Figure A-16*, is opened by selecting **Create -> Staffing Profile** or **Resource -> Staffing Profiles -> Create a Staffing Profile** from the navigation bar.

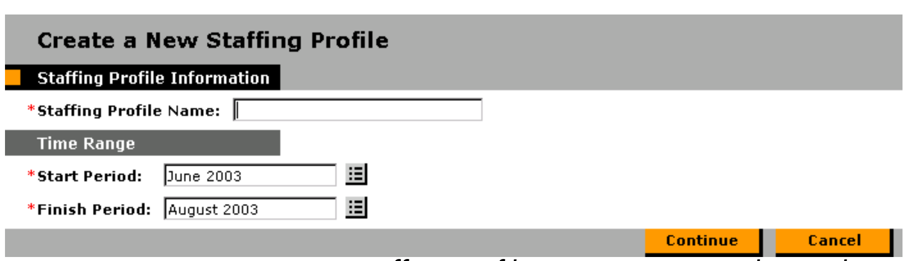


Figure A-16 Create a New Staffing Profile Page - Name and Periods

Table A-10. Create a New Staffing Profile Page - Name and Periods - Fields

Field	Description
STAFFING PROFILE NAME	The name of the Staffing Profile.
START PERIOD	The first time period the Staffing Profile accounts for.
FINISH PERIOD	The last time period the Staffing Profile accounts for.
CONTINUE	Continues to the next CREATE A NEW STAFFING PROFILE page.
CANCEL	Returns you to the last Dashboard page you visited without creating the Staffing Profile.

Clicking **CONTINUE** opens the second CREATE A NEW STAFFING PROFILE page.7

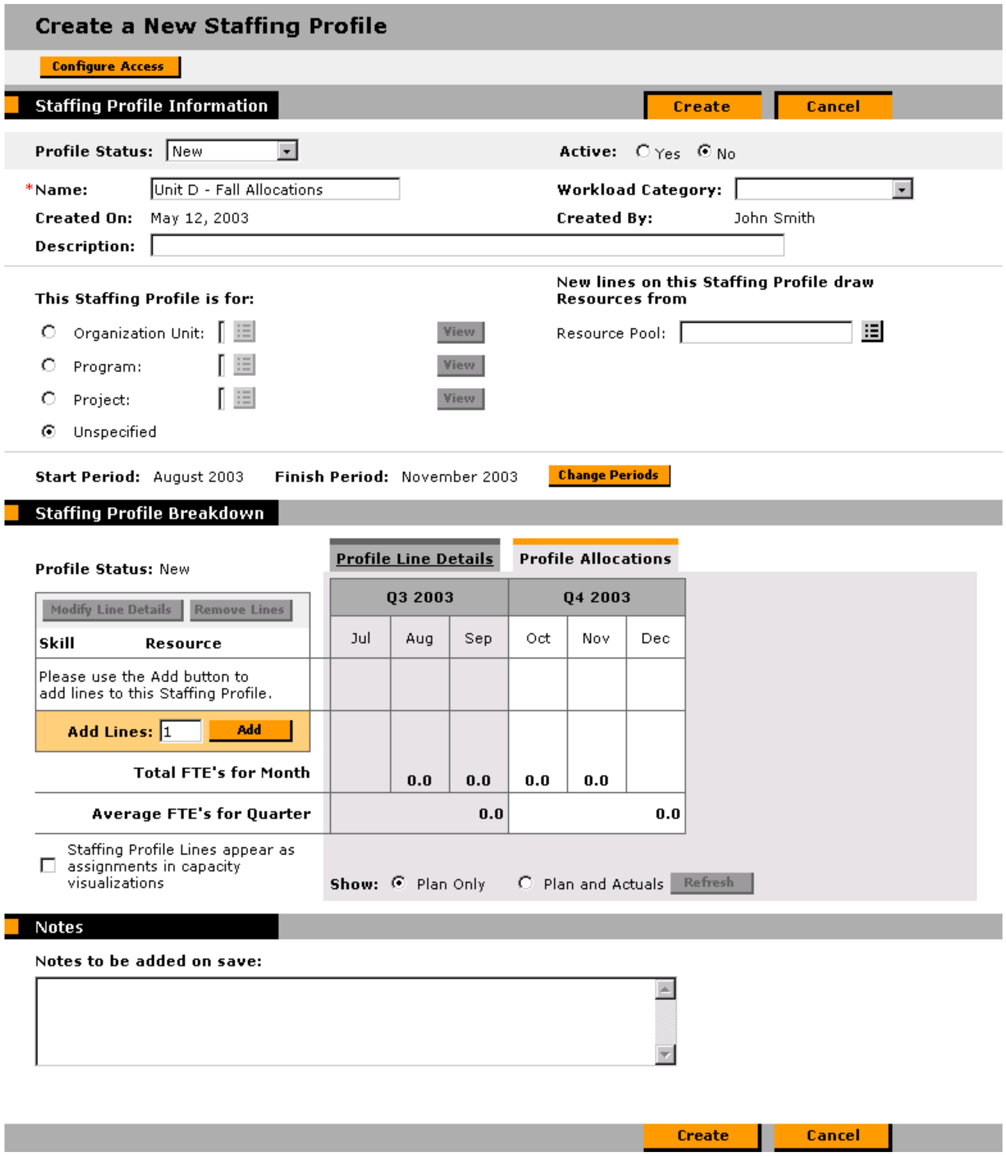


Figure A-17 Create a New Staffing Profile Page - Details

Table A-11. Create a New Staffing Profile Page - Details - Fields

Field	Description
Staffing Profile Information	
PROFILE STATUS	The status of the Staffing Profile. Possible values: **NEW**, **PROPOSED**, **UNDER REVIEW**, **IN REWORK**, **ON HOLD**, **APPROVED**, **REJECTED**, **CANCELLED**, **CLOSED**

Table A-11. Create a New Staffing Profile Page - Details - Fields

Field	Description
ACTIVE	Whether or not the Staffing Profile is active. Inactive Staffing Profiles are not included in Resource Management visualizations.
NAME	The name of the Staffing Profile.
WORKLOAD CATEGORY	The category of work being tracked by the Staffing Profile.
CREATED ON	The date the Staffing Profile was created.
CREATED BY	The user who created the Staffing Profile.
DESCRIPTION	A description of the Staffing Profile.
THIS STAFFING PROFILE IS FOR	Defines whether the Staffing Profile is associated with an ORGANIZATION UNIT, a PROGRAM (if Kintana PMO Solution is installed), a PROJECT, or UNSPECIFIED.
NEW LINES ON THIS STAFFING PROFILE DRAW RESOURCES FROM	Allows the user to specify a Resource Pool from which the Staffing Profile will draw Resources. When adding a line to the Staffing Profile, the RESOURCE POOL field will be automatically filled in.
START PERIOD	The starting period (a fiscal month) for the Staffing Profile.
FINISH PERIOD	The ending period (a fiscal month) for the Staffing Profile.
CHANGE PERIODS	Allows you to change the periods for the Staffing Profile.
Staffing Profile Breakdown	
MODIFY LINE DETAILS	If any Staffing Profile lines exist and have been selected, opens a page that allows you to change details for the selected lines.
REMOVE LINES	If any Staffing Profile lines exist and have been selected, removes the selected lines from the Staffing Profile.
SKILL	The Skill being projected. Each Staffing Profile line can hold one Skill.
RESOURCE	The Resource for the Skill. Each Staffing Profile line can hold one Resource per Skill.
ADD LINES	Specifies a number of lines to add to the Staffing Profile.
ADD	Opens the ADD LINES TO STAFFING PROFILE page with the specified number of blank lines loaded.
TOTAL FTE'S FOR MONTH	The total Full Time Equivalents for each month being projected in the Staffing Profile.
AVERAGE FTE'S FOR QUARTER	The average Full Time Equivalents per quarter being projected in the Staffing Profile.

Table A-11. Create a New Staffing Profile Page - Details - Fields

Field	Description
STAFFING PROFILE LINES APPEAR AS ASSIGNMENTS IN CAPACITY VISUALIZATIONS	If selected, the Full Time Equivalents set in the Staffing Profile will be counted as actual work assignments in Resource Management capacity visualizations.
SHOW	Allows you to choose between tracking **PLAN ONLY** values for Staffing Profile line allocations or **PLAN AND ACTUALS**.
REFRESH	Refreshes the CREATE A STAFFING PROFILE page when a SHOW choice has been made.
NOTES	Any notes on the Staffing Profile itself.
CREATE	Creates the Staffing Profile.
CANCEL	Returns you to the last Dashboard page you visited without creating the Staffing Profile.

Add Lines to Staffing Profile Page

When you enter a value into the ADD LINES field in the second CREATE A NEW STAFFING PROFILE page and click **ADD**, the ADD LINES TO STAFFING PROFILE page opens, requesting details for the Staffing Profile lines you are adding.

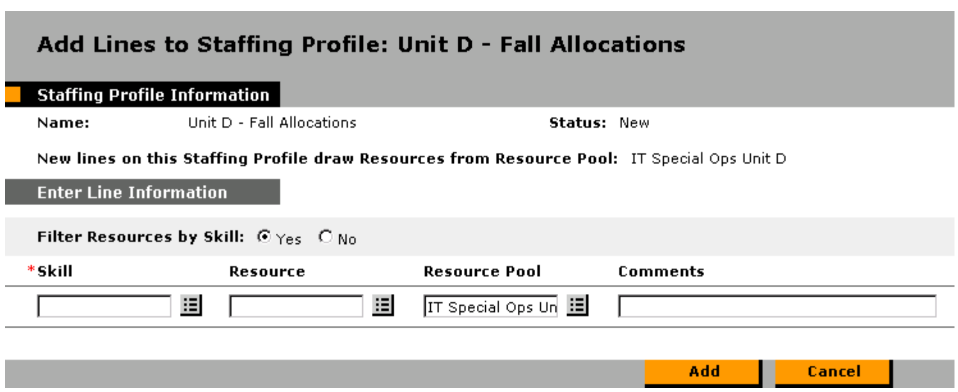


Figure A-18 Add Lines to Staffing Profile Page (one line)

Table A-12. Add Lines to Staffing Profile Page- Fields

Field	Description
FILTER RESOURCES BY SKILL	Decides whether or not only Resources with the specified SKILL will appear in the RESOURCE field once a SKILL has been specified.

Table A-12. Add Lines to Staffing Profile Page- Fields

Field	Description
SKILL	The Skill being tracked by the Staffing Profile.
RESOURCE	The Resource being tracked by the Staffing Profile. If FILTER RESOURCES BY SKILL is set to **NO**, the Resource may not necessarily have the Skill specified.
RESOURCE POOL	Specifies a Resource Pool for the Staffing Profile to draw Resources from.
COMMENTS	Any comments specific to the Staffing Profile line.
ADD	Adds the line(s) to the Staffing Profile.
CANCEL	Returns to the CREATE A NEW STAFFING PROFILE page without adding the lines.

Search Staffing Profiles Page

The SEARCH STAFFING PROFILES page is used to locate Staffing Profiles to view. Access the SEARCH STAFFING PROFILES page by selecting **SEARCH -> STAFFING PROFILES** from the navigation bar. Clicking on a Staffing Profile name in the SELECT STAFFING PROFILE TO VIEW section opens that Staffing Profile's VIEW STAFFING PROFILE page.

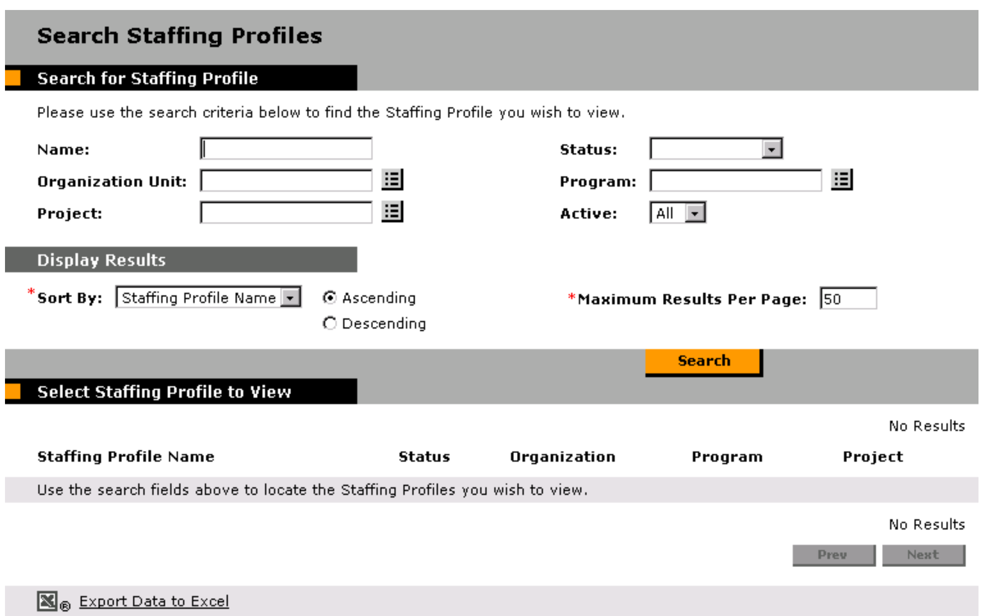


Figure A-19 Search Staffing Profiles Page

Table A-13. Search Staffing Profiles Page - Parameters

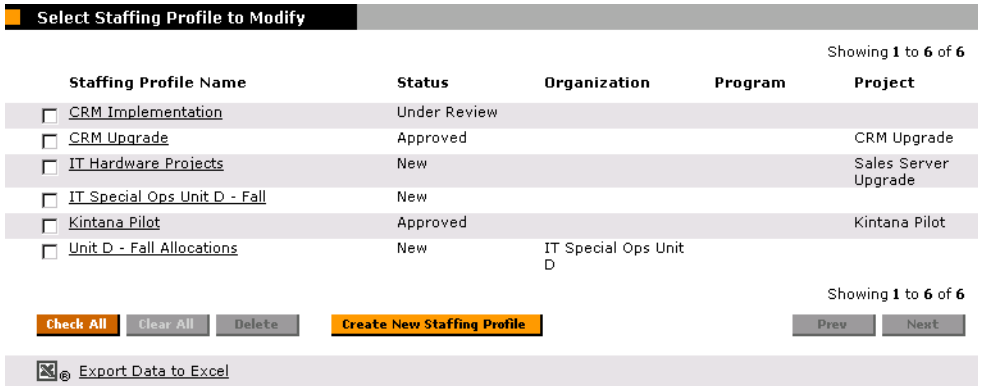
Field	Description
NAME	Searches for Staffing Profiles by name.
STATUS	Searches for Staffing Profiles by Status.
ORGANIZATION UNIT	Searches for Staffing Profiles by attached Organization Unit.
PROGRAM	Searches for Staffing Profiles by associated Program (only appears if you have installed the Kintana Program Management Office Solution)
PROJECT	Searches for Staffing Profiles by associated Project.
ACTIVE	Searches for Staffing Profiles by whether or not they are active.
SORT BY	Sets the order of search results. Possible values: **STAFFING PROFILE NAME**, **STATUS**, **ORGANIZATION**, **PROGRAM**, or **PROJECT**.
ASCENDING/DESCENDING	Arranges the search results in ascending or descending order.
MAXIMUM RESULTS PER PAGE	Sets the maximum number of Staffing Profiles to display per page.
SEARCH	Initiates the search.
EXPORT DATA TO EXCEL	Exports the search results to a Microsoft Excel spreadsheet, which opens in a separate window.

Modify Staffing Profiles Page

The MODIFY STAFFING PROFILES page is used to locate Staffing Profiles to modify. Access the MODIFY STAFFING PROFILES page by selecting **RESOURCE -> STAFFING PROFILES -> MODIFY STAFFING PROFILES** from the navigation bar.

The MODIFY STAFFING PROFILES page looks and functions identically to the *Search Staffing Profiles Page* with the following exceptions:

- Clicking on a Staffing Profile name in the SELECT STAFFING PROFILE TO MODIFY section opens that Staffing Profile's MODIFY STAFFING PROFILE page.
- You can delete Staffing Profiles by selecting the check box next to the Staffing Profile Name and clicking **DELETE**.
- You can create new Staffing Profiles by clicking **CREATE NEW STAFFING PROFILE**.



Select Staffing Profile to Modify

Showing **1** to **6** of **6**

	Staffing Profile Name	Status	Organization	Program	Project
☐	CRM Implementation	Under Review			
☐	CRM Upgrade	Approved			CRM Upgrade
☐	IT Hardware Projects	New			Sales Server Upgrade
☐	IT Special Ops Unit D - Fall	New			
☐	Kintana Pilot	Approved			Kintana Pilot
☐	Unit D - Fall Allocations	New	IT Special Ops Unit D		

Showing **1** to **6** of **6**

Check All | Clear All | Delete | Create New Staffing Profile | Prev | Next

Export Data to Excel

Figure A-20 Modify Staffing Profiles Page - Results section example

Analysis Pages

The following pages and fields in the Kintana interface provide a way to analyze Resource Pools, Staffing Profiles, and work assignments:

- *Analyze Resource Pools Page*
- *Compare Project Assignments to Staffing Profile Lines Page*
- *Analyze Assignment Load Page*

Analyze Resource Pools Page

The ANALYZE RESOURCE POOLS page provides a way to assess planned load on Resource Pools by comparing them to Staffing Profiles. Open the ANALYZE RESOURCE POOLS page by selecting **RESOURCE -> ANALYZE -> RESOURCE POOLS** from the navigation bar.

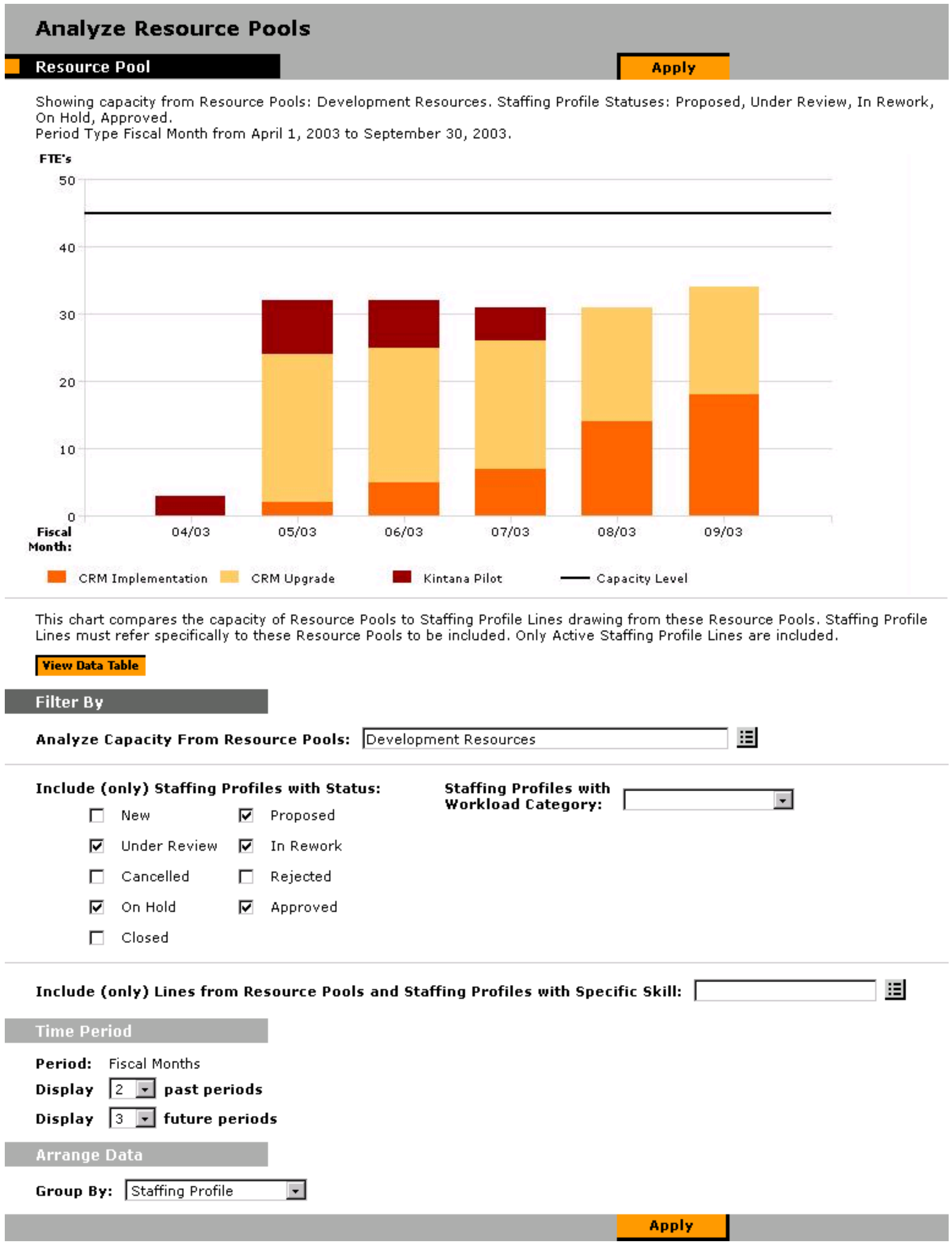


Figure A-21 Analyze Resource Pools Page

Table A-14. Analyze Resource Pools Page - Parameters

Field	Description
VIEW DATA TABLE	Opens the ANALYZE RESOURCE POOLS BREAKDOWN TABLE, pictured in *Figure A-22*.

Table A-14. Analyze Resource Pools Page - Parameters

Field	Description
Filter By	
ANALYZE CAPACITY FROM RESOURCE POOLS	A multi-select auto-complete field that selects the Resource Pool or Pools you wish to analyze.
INCLUDE (ONLY) STAFFING PROFILES WITH STATUS	Selects Staffing Profiles with the specified Statuses to display.
STAFFING PROFILES WITH WORKLOAD CATEGORY	Selects Staffing Profiles of a specific WORKLOAD CATEGORY to display.
INCLUDE (ONLY) LINES FROM RESOURCE POOLS AND STAFFING PROFILES WITH SPECIFIC SKILL	A multi-select auto-complete field that selects a Skill or set of Skills to display from the Resource Pools and Staffing Profiles being analyzed.
Time Period	
PERIOD	Display only. Shows the time period being used by the ANALYZE RESOURCE POOLS page.
DISPLAY (X) PAST PERIODS	Selects up to 20 time periods before the current date to include in the ANALYZE RESOURCE POOLS page. Useful for viewing historical trends.
DISPLAY (X) FUTURE PERIODS	Selects up to 20 time periods after the current date to include in the ANALYZE RESOURCE POOLS page.
Arrange Data	
GROUP BY	Determines whether to display the results by **STAFFING PROFILE** or **STAFFING PROFILE STATUS**.
APPLY	Refreshes the page, taking into account any changed parameter values.

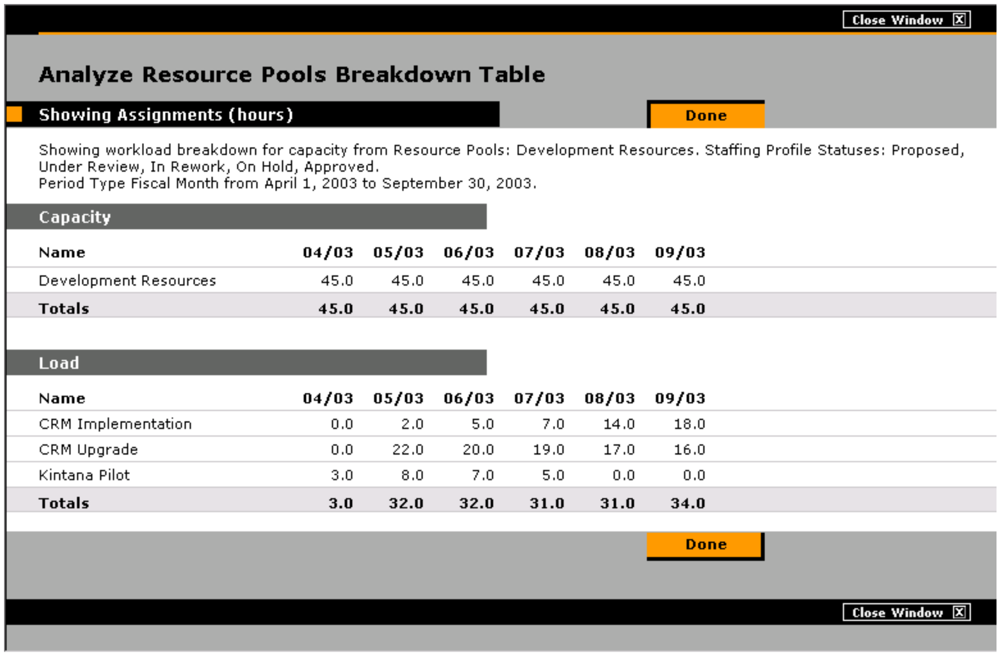


Figure A-22 Analyze Resource Pools Breakdown Table

Compare Project Assignments to Staffing Profile Lines Page

The COMPARE PROJECT ASSIGNMENTS TO STAFFING PROFILE LINES page provides a way to assess current Project assignments against the Staffing Profiles they are associated with. Open the COMPARE PROJECT ASSIGNMENTS TO STAFFING PROFILE LINES page by selecting **RESOURCE -> ANALYZE -> PROJECT ASSIGNMENTS TO STAFFING PROFILE LINES COMPARISON**.

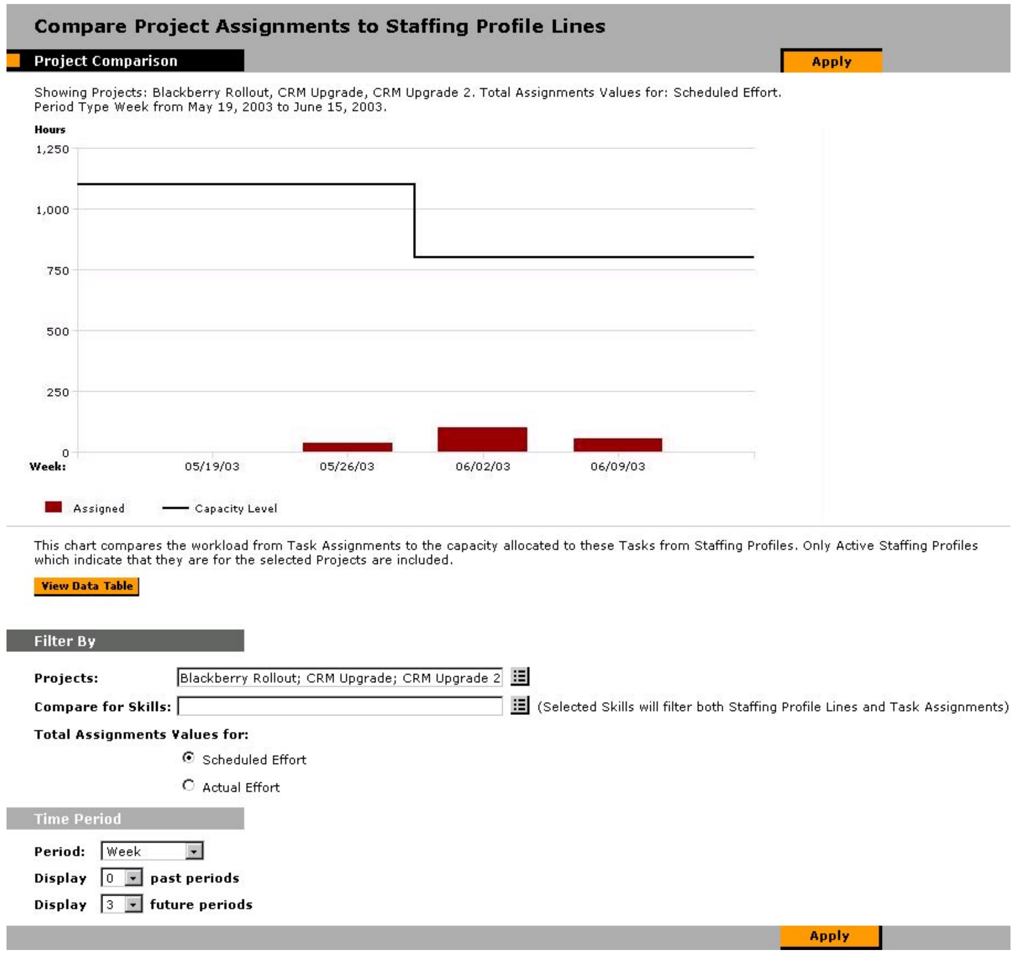


Figure A-23 Compare Project Assignments to Staffing Profile Lines Page

Table A-15. Compare Project Assignments to Staffing Profile Lines Page - Parameters

Field	Description
VIEW DATA TABLE	Opens the COMPARE PROJECTS TO STAFFING PROFILE LINES BREAKDOWN TABLE, pictured in *Figure A-24*.
Filter By	
PROJECTS	A multi-select auto-complete field that selects the Projects to display in the COMPARE PROJECT ASSIGNMENTS TO STAFFING PROFILE LINES page.
COMPARE FOR SKILLS	A multi-select auto-complete field that selects the Skills specified in both Staffing Profile lines and Task assignments which will be displayed.

Table A-15. Compare Project Assignments to Staffing Profile Lines Page - Parameters

Field	Description
TOTAL ASSIGNMENTS VALUES FOR	Sets whether to display **SCHEDULED** or **ACTUAL EFFORT** in the COMPARE PROJECT ASSIGNMENTS TO STAFFING PROFILE LINES page.
Time Period	
PERIOD	Sets the time period being used by the COMPARE PROJECT ASSIGNMENTS TO STAFFING PROFILE LINES page.
DISPLAY (X) PAST PERIODS	Selects up to 20 time periods before the current date to include in the COMPARE PROJECT ASSIGNMENTS TO STAFFING PROFILE LINES page. Useful for viewing historical trends.
DISPLAY (X) FUTURE PERIODS	Selects up to 20 time periods after the current date to include in the COMPARE PROJECT ASSIGNMENTS TO STAFFING PROFILE LINES page.
APPLY	Refreshes the page, taking into account any changed parameter values.

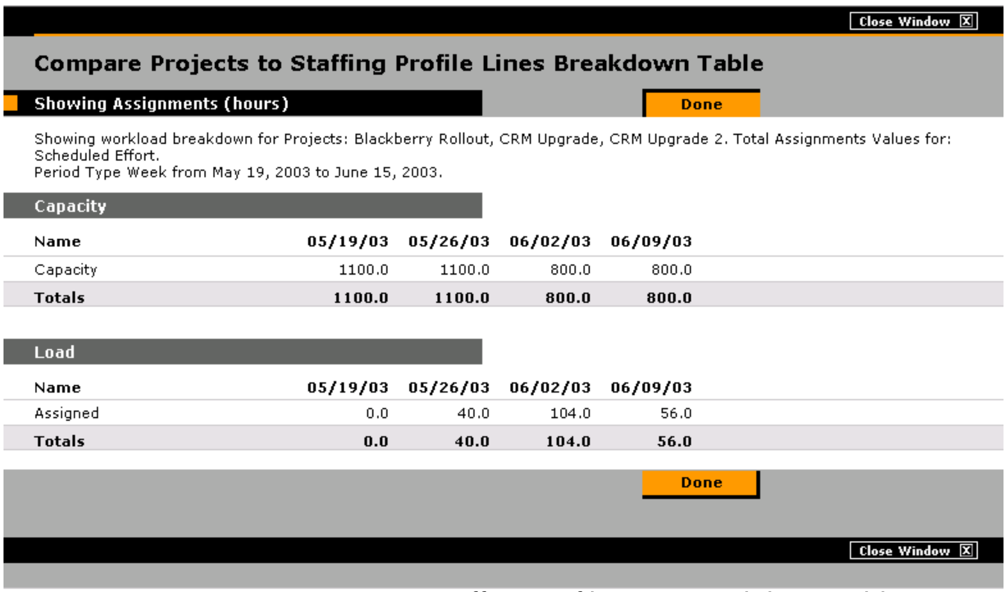


Figure A-24 Compare Projects to Staffing Profile Lines Breakdown Table

Analyze Assignment Load Page

The ANALYZE ASSIGNMENT LOAD page provides a tool for visualizing assignments sorted according to different criteria and levels of specificity. Open the ANALYZE ASSIGNMENT LOAD page by selecting **RESOURCE -> ANALYZE -> ASSIGNMENT LOAD.**

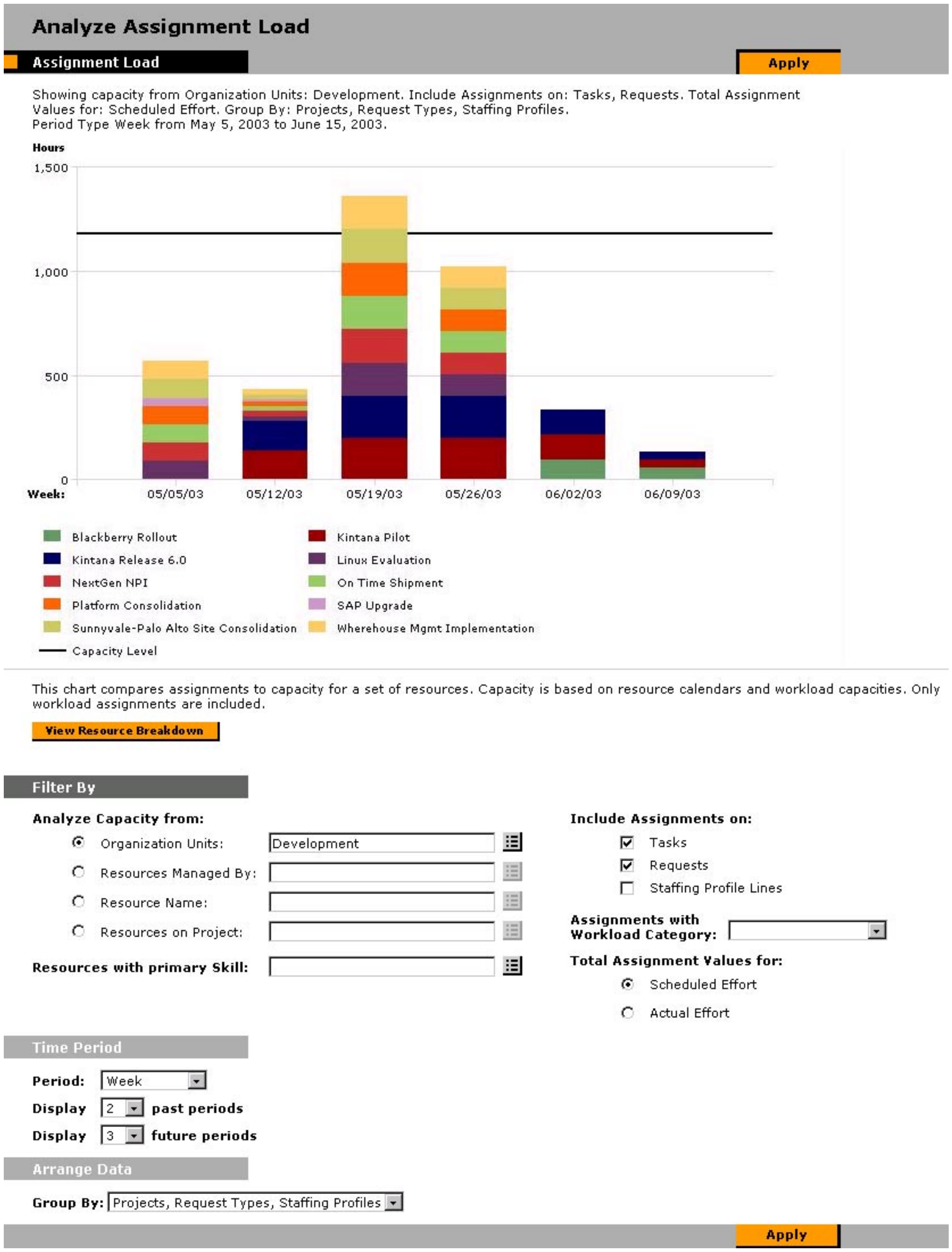


Figure A-25 Analyze Assignment Load Page

Table A-16. Analyze Assignment Load Page - Parameters

Field	Description
VIEW RESOURCE BREAKDOWN	Opens the RESOURCE BREAKDOWN TABLE, pictured in *Figure A-26*.

Table A-16. Analyze Assignment Load Page - Parameters

Field	Description
Filter By	
ANALYZE CAPACITY FROM	A choice of multi-select auto-complete fields that selects the sets of Resources to display in the ANALYZE ASSIGNMENT LOAD page. Possible choices: **ORGANIZATION UNITS**, **RESOURCES MANAGED BY**, **RESOURCE NAME**, **RESOURCES ON PROJECT**
INCLUDE ASSIGNMENTS ON	Chooses whether to include **TASKS**, **REQUESTS**, and/or **STAFFING PROFILE LINES** in the visualization.
ASSIGNMENTS WITH WORKLOAD CATEGORY	Selects assignments of a specific WORKLOAD CATEGORY to display.
RESOURCES WITH PRIMARY SKILL	A multi-select auto-complete field that selects a Skill or set of Skills to display from the sets of Resources being analyzed.
TOTAL ASSIGNMENT VALUES FOR	Sets whether to display **SCHEDULED** or **ACTUAL EFFORT** in the ANALYZE ASSIGNMENT LOAD page.
Time Period	
PERIOD	Sets the time period being used by the ANALYZE ASSIGNMENT LOAD page.
DISPLAY (X) PAST PERIODS	Selects up to 20 time periods before the current date to include in the ANALYZE ASSIGNMENT LOAD page. Useful for viewing historical trends.
DISPLAY (X) FUTURE PERIODS	Selects up to 20 time periods after the current date to include in the ANALYZE ASSIGNMENT LOAD page.
Arrange Data	
GROUP BY	Chooses a category or set of categories to group the data by. Possible choices: **PROJECTS, REQUEST TYPES, STAFFING PROFILES**; **SKILLS**; **NONE**
APPLY	Refreshes the page, taking into account any changed parameter values.

Close Window

Resource Breakdown Table

View Table by: (•) Assignments / Capacity (%) ( ) Showing Assignments (hours) ( ) Availability (hours)

Highlight: [x] Overallocation [x] Availability **Refresh**

Showing Assignments / Capacity (%) **Done**

Showing resource breakdown for capacity from Organization Units: Development. Include Assignments on: Tasks, Requests. Total Assignment Values for: Scheduled Effort. Group By: Projects, Request Types, Staffing Profiles.
Period Type Week from May 5, 2003 to June 15, 2003.

Name	05/05/03	05/12/03	05/19/03	05/26/03	06/02/03	06/09/03
agaetz	360	140	680	440	180	20
bchristy	0	0	0	0	0	0
bsmith	0	140	680	440	100	0
cmurray	0	140	680	440	100	0
cparra						
dfry	0	0	0	0	0	0
dleon	0	0	0	0	0	0
drichau	0	0	0	0	0	0
dsnow	0	0	0	0	0	0
etru	0	0	0	0	0	0
fkim	0	0	0	0	0	0
gnewby	360	140	680	440	180	20
gsanders	0	0	0	0	0	0
jadams	0	0	0	0	0	0
jknoll	0	0	0	0	0	0
jlee	100	20	0	0	0	0
jvicks	360	140	680	440	180	20
kenders	0	0	0	0	0	0
kquan	0	0	0	0	0	0
kryan	0	0	0	0	0	0
kshaw	0	0	0	0	0	0
lloewy	0	0	0	0	0	0
mfisch	240	360	0	360	100	280
mgunn	0	0	0	0	0	0
mjohnston	0	0	0	0	0	0
mrice	0	0	0	0	0	0
pamberg	0	0	0	0	0	0
rcarter	0	0	0	0	0	0
sedwards	0	0	0	0	0	0
ssingh	0	0	0	0	0	0
ssmith	0	0	0	0	0	0
swinstandley	0	0	0	0	0	0
Totals	**48**	**37**	**114**	**87**	**28**	**12**

Done

Close Window

Figure A-26 Resource Breakdown Table

Table A-17. Resource Breakdown Table - Controls

Field	Description
VIEW TABLE BY	Chooses the data to display in the table. **ASSIGNMENTS/CAPACITY (%)** — Shows each Resource's assignments as a percentage of their WORKLOAD CAPACITY. **SHOWING ASSIGNMENTS (HOURS)** — Shows each Resource's assignment total in working hours. **AVAILABILITY (HOURS)** — Shows each Resource's total available working hours.
HIGHLIGHT	Chooses whether to highlight **OVERALLOCATION** (red numbers) or **AVAILABILITY** (green numbers) in the table.
REFRESH	Refreshes the table. Click **REFRESH** after making a choice in VIEW TABLE BY or HIGHLIGHT.

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