

K I N T A N A™

Time Management Administration Guide

Version 5.0.0

Publication Number: TimeManageAdmin-0603A

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Kintana Version 5.0.0

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Printed in USA

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Time Management Initial Configuration

The Time Management Solution is included in the standard Kintana 5.0 installation. Only a few post-installation steps are required:

- *1 - License Key*
- *2 - Enable a Time Management Super User*
- *3 - Select Time Period Type & Create Periods*

1 - License Key

The Kintana installation requires a separate license key to enable Time Management. Install the license key into KNTA_HOME/conf/license.conf.

Please contact Kintana Support if you do not have the license key.

2 - Enable a Time Management Super User

At least one user will require access to setup other users and configure Time Management. Assign this user a license to Time Management from the Kintana Workbench USERS screen and add the user to a Security Group with access to the appropriate Time Management Access Grants.

3 - Select Time Period Type & Create Periods

Decide what Period Types are going to be used on a given Time Management System.

The supported Period Types are:

- Weekly
- Bi-Weekly
- Semi-Monthly
- Monthly.

You can check the available options by directly running the following query against the schema in which Time Management has been installed:

```
SELECT * FROM KTMG_PERIOD_TYPES
```

1. Set the enabled flag for the Period Types of your choice by executing the following statement:

```
UPDATE ktmg_period_types
SET enabled_flag = 'Y'
WHERE period_type_name = '<Your chosen period Type>'
```

Eligible values are WEEKLY, BI_WEEKLY, SEMI_MONTHLY, and MONTHLY. These values are case sensitive when used in the above SQL statement.

2. Enable as many Period Types as desired. The Period Type is set at the Resource level in the TIME MANAGEMENT SETTINGS screen in the Kintana Workbench interface.
3. After enabling the right Period Type, make sure you set enabled_flag = 'N' for all other Period Types.

For the WEEKLY and BI_WEEKLY Period Types, it is also possible to change the start_day_code. By default, it is set to MONDAY, but possible values are MONDAY, TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, SATURDAY and SUNDAY. Manually set it using SQL.

4. After disabling all unwanted Period Types, you're now ready to create Time Periods in your Time Management system.
5. cd into <KNTA_HOME>/bin directory, and run the following command:

```
sh kGenTimeMgmtPeriods <num of periods to be generated>
```

You will be prompted to choose the Period Type to generate periods for. By default the periods start from the current date. For more options, call the script with no parameters and choose to see the Help. It is possible to add Periods at any time.

Configuring the Time Management Solution

Introduction

The Kintana Time Management Solution allows you to budget time against bodies of work within the Kintana Product Suite. You can enter the actual time spent on these bodies of work, then review, approve, and report on the actual time.

Compatible with Kintana 5.0, this solution allows you to integrate information from your Requests, Packages, Tasks and Projects and quickly determine if estimated time and costs associated with these Kintana entities relates to actual time and costs.

This provides the type of management information needed to pinpoint trouble-spots in your organization and make necessary corrections, such as when Projects are over their budgeted time allocation or have unplanned overtime for certain Requests.

Administration of the Kintana Time Management Solution involves using a number of server configuration settings as well as new windows in the Kintana Workbench.

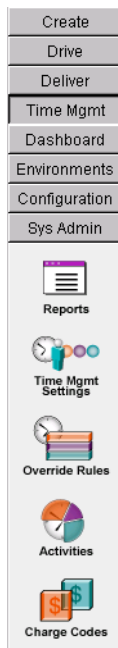


Figure 2-1 Kintana Workbench - Time Mgmt Screen Group

This document discusses the following topics related to administering the Kintana Time Management Solution:

- *“Key Concepts and Definitions”* on page ix
- *“Process Overview”* on page xiv
- *“Maintaining Resources”* on page xviii
- *“Maintaining Time Management Settings for Security Groups”* on page xxviii
- *“Maintaining Activities”* on page xxxi
- *“Maintaining Charge Codes”* on page xxxvi
- *“Maintaining Override Rules”* on page xli
- *“Configurable Filters”* on page xlvi
- *“Integration with Kintana Drive”* on page lii
- *“Other Time Management Validations”* on page liv
- *“Time Management and the Kintana Dashboard”* on page lv
- *“Time Management Reports”* on page lxvii

Key Concepts and Definitions

The following concepts and terms are used in the Kintana Time Management Solution. A thorough understanding of these concepts and terms is necessary when using the Kintana Time Management Solution.

- *Work Item*
- *Work Allocation*
- *Resource*
- *Time Sheet*
- *Activity*
- *Charge Code*
- *Period Types and Periods*
- *Delegations*
- *Override Rule*

Work Item

When budgeting and entering time, you need an entity to budget and enter time against. The Kintana Time Management Solution refers to this entity as a Work Item. A Work Item can be a:

- Request in Kintana Create
- Package in Kintana Deliver
- Project or Subproject in Kintana Drive
- Task in Kintana Drive
- Miscellaneous item configurable from the Validation **TMG - Misc. WORK ITEMS**

These entities involve one or more Resources that usually span multiple process steps, and require significant time and effort. The Kintana Time Management Solution allows both an individual Project Task and a Project/Subproject to be a Work Item. This allows you to track time spent at a granular Task level or at a higher level Project bucket.

Work Items for each Work Item Type are shown in [Figure 2-2](#).

Time Sheet Details						
Work Item Type	Work Item	Work Item Set	Description	Current Bdgt (hrs)	Actuals To date (hrs)	
Request	30009	Bug	VPN isn't working on Win2K Dell laptop			
Package	30003	JF-WF-Deliver	New Release of eCommerce site	125	0	
Task	Complete	Enterprise Initiatives	Enterprise Initiatives > Phase I > Complete Gartner IS*I ROI study for Applied			
Project	Analysis S	BL_Project	BL_Project > Analysis Stage			
Request						

Figure 2-2 Work Items

Work Allocation

In addition to reactively tracking work performed against a Work Item, you can proactively budget or allocate the time that can be spent on the Work Item. This Work Allocation allows Managers and Planners to specify the time that should be spent on any given Task and allows Resources to see how much time they have been allocated to get the job done. A Work Allocation can also be used to indicate the Charge Codes to charge back the time spent on the Work Item.

Resource

A Resource is an individual user who performs work in Kintana. Resources are assigned to specific Work Items and have attributes such as Manager, Approver(s), and Cost Rate. Managers and Planners enter Work Allocations, as they have been granted access for this activity based on their attributes. Resources enter actual time spent using Time Sheets. A Resource must be a valid User in the Kintana system.



Resources used in the Time Management Solution are defined by the Resource Management and Project Costing functionality in Kintana. Time Management-specific features of Resources are configured in the TIME MANAGEMENT SETTINGS screen in the Kintana Workbench.

Time Sheet

A basic entity in Time Management systems, a Time Sheet is an aggregation of the time worked for several Work Items by a specific Resource for a specific time period. A Resource enters time details at granular levels such as Work

Item, Activity, and Day. The review and approval process is performed at the Time Sheet level. A blank Time Sheet is shown in *Figure 2-3*.

Enter Time

Resource: **John Smith** Period: **06/01/03 - 06/15/03** Time Sheet #: **1**
 Status: **Active** Description:

Time Sheet Details

All Times are in Hours

Work Item Type	Work Item	Work Item Set	Work Item Description	Current Budget	Actuals To Date	Details	Period Total	Sun 6/1	Mon 6/2	Tue 6/3	Wed 6/4	Thu 6/5	Fri 6/6	Sat 6/7
<input type="checkbox"/> Request	<input type="text"/>	<input type="text"/>				<input type="button" value="+"/> <input type="button" value="0"/> <input type="button" value=""/>	0							
<input type="checkbox"/> Request	<input type="text"/>	<input type="text"/>				<input type="button" value="+"/> <input type="button" value="0"/> <input type="button" value=""/>	0							
<input type="checkbox"/> Request	<input type="text"/>	<input type="text"/>				<input type="button" value="+"/> <input type="button" value="0"/> <input type="button" value=""/>	0							
<input type="button" value="Remove Lines"/> <input type="button" value="Reset to Saved"/> New Lines: <input type="text"/> <input type="button" value="Add"/> Totals: 0								0	0	0	0	0	0	0

Work Item Filters

General Filters

Modified in Last x Days: Created in Last x days: Include Closed? Yes No

Request Filters

Request Type: Request Assigned To: Request Assigned Group:

Package Filters

Package Workflow: Package Assigned Group: Package Assigned To:

Project Filters

Master Project: Project Assigned Resource: Master Projects Only? Yes No
 Project Manager:

Figure 2-3 Sample Time Sheet

Activity

An activity is a categorization of the type of work performed against a Work Item. In addition to tracking the total time spent on a given Item, you might want to track how much of that time was spent performing design work, and how much was spent in development or testing. When using the Kintana Time Management Solution, your Kintana Administrator will set up lists of Activities that your organization can use to categorize actual time.

Charge Code

In some organizations, actual time is used as information for charge backs or billing. After the Work Item is entered, actual time is entered against it. This generates a cost which is billed to the internal or external customer/requestor.

While the Kintana Time Management Solution does not explicitly perform this charge back or billing function, it does allow you to specify information such

as Charge Codes. This enables you to create links between Work Items and your charge accounts, allowing you to easily extract time information for use by your billing systems. *Figure 2-4* shows a sample Charge Code where 50% of the Work Allocation is charged to the Services account and 50% to the Development account.

Work Allocation Charge Code Information

Work Item Type: Task
 Work Item Set: Development Laptop Upgrade
 Work Item: Cost Analysis
 Description: Development Laptop Upgrade > Initial Assessment > Cost Analysis

Allow User to Update Charge Codes
 Charge Codes are Required on Time Sheet

Add New Charge Codes

Charge Code: Add

Charge Code Name	Description	Charge Percent
<input type="checkbox"/> Development Account	Development Account	50
<input type="checkbox"/> Services Account	Services Account	50
Total		100

Remove Done Cancel

Figure 2-4 Sample Charge Codes

Period Types and Periods

Period Types specify the different types of intervals for which Time Sheets record information. Supported Period Types include:

- Weekly — A start date must be specified for this Period Type.
- Bi-Weekly — A start date must be specified for this Period Type.
- Semi-Monthly — Breaks the month into two halves:
 - o 1st - 15th
 - o 16th - end
- Monthly

A Period (or Time Period) is an instance of the Period Type specified for your installation such as “05/01/02 - 05/15/02” and “06/16/02 - 06/23/02.” A Time

Sheet will have days for each day in the Time Period for which it is associated. *Figure 2-5* shows an example of a Time Sheet using a Semi-Monthly Time Period.

Resources can specify how time is entered against Periods. See Table 2-2 on page xxi for more detailed information.

All Times are in Hours

Sun 6/1	Mon 6/2	Tue 6/3	Wed 6/4	Thu 6/5	Fri 6/6	Sat 6/7
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
0	0	0	0	0	0	0

Figure 2-5 Semi-Monthly Time Period

The Kintana installation supports one or more Period Types.

Delegations

Resources can assign other Resources (referred to as “delegates”) to manage Time Sheets for them.



Example

A Manager who normally approves Time Sheets is going on vacation for a week. That Manager can assign someone as a “delegatee” to approve or reject Time Sheets while the Manager is gone.

A delegatee can perform the following actions on behalf of the delegator:

- Approve/reject Time Sheets
- Freeze/close Time Sheets
- Edit and submit Time Sheets

To perform these operations, the delegatee must have the proper Access Grants. The Access Grants are not inherited when the delegation is made. Charge Codes also appear based on the delegatee’s level of access, and are not transferred from the delegator.

A Resource designated as a Manager can also perform implicit delegations. Managers are able to edit Time Sheets of their direct reports, provided they have the Edit Time Sheet Access Grant.

Override Rule

When tracking costs, you can use default cost rates associated with Resources. However, you can define Override Rules that will supersede these rates based on specific Time Sheet line information such as Work Item Type and Work Item. For example, you might chose to use a non-standard rate for a specific Project. This can be accomplished with an Override Rule. Override Rules can also set the Time Sheet Approvers and Charge Codes for a Work Item. Rules are applied based on a variety of Rule inputs, such as WORK ITEM TYPE, DEPARTMENT, TITLE, etc.

Process Overview

The Kintana Time Management process consists of the following steps:

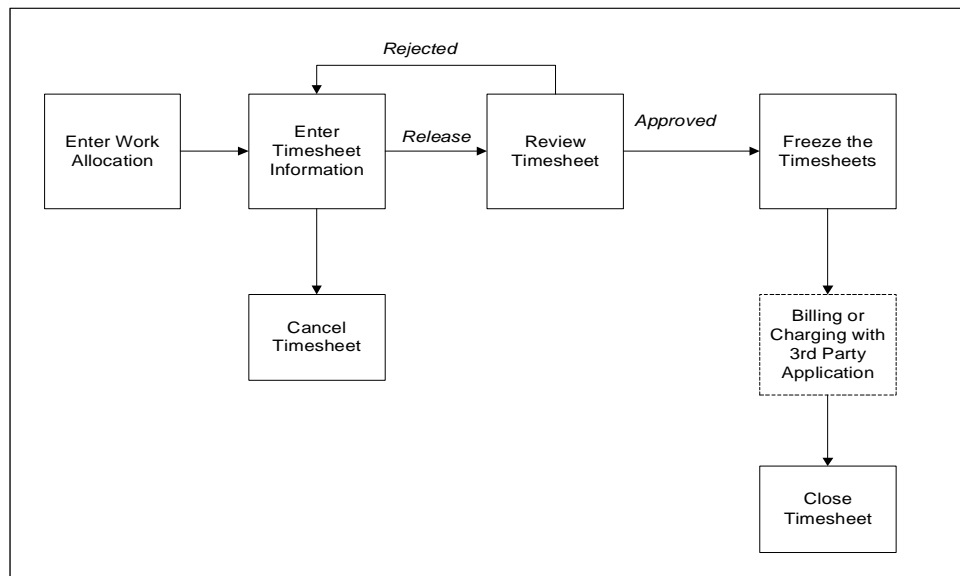


Figure 2-6 Kintana Time Management Process

1. **Entering Work Allocations** – Managers or planners enter the budgeted amount of time that can be spent for specific Work Items. These individuals also specify information such as which Resources can allocate time to the specific Work Item and where to charge the actual time worked.

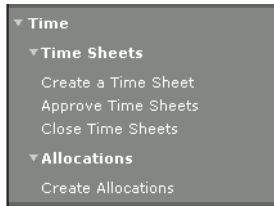
Based on your system configurations, you may or may not use Work Allocations. If allocations are not used and you are using the Kintana Time

Management Solution to simply track actual time worked, this process step is not used.

2. **Entering and Releasing Time Sheets** – Individual Resources enter and update Time Sheets. They specify what they worked on in a given time period, how much they spent on each item every day, and (optionally) what types of activities they performed.
3. **Reviewing and Approving Time Sheets** – Once a user has entered and released a Time Sheet, other individuals need to review and approve it. If rejected, Time Sheets go back to the original Resource for update or additional justification. If approved, Time Sheets move forward to the final steps in the process.
4. **Freezing Time Sheets** –Even after a Time Sheet is approved, you might allow a period of time for additional updates and re-approvals. At some point in time, you will want to 'freeze' the Time Sheet so that you can report on its information or extract the information into your billing and financial systems.
5. **Closing Time Sheets** – Once a Time Sheet has been frozen and any data extraction or other external activity performed, you can then 'close' the Time Sheet, updating its status for reporting purposes.
6. **Billing or Charging with 3rd Party Application** - After the Time Sheet is closed, it generates a cost which is billed to an internal or external customer/requestor. While the Kintana Time Management Solution does not explicitly perform the billing function, it does let you to create links between Work Items and your charge accounts, allowing you to extract time information for use by your third party financial application.
7. **Cancelling Time Sheets** – Only “Active” Time Sheets can be cancelled. Once a Time Sheet has been cancelled, it cannot be reopened or updated.

Time Management Activities Menu

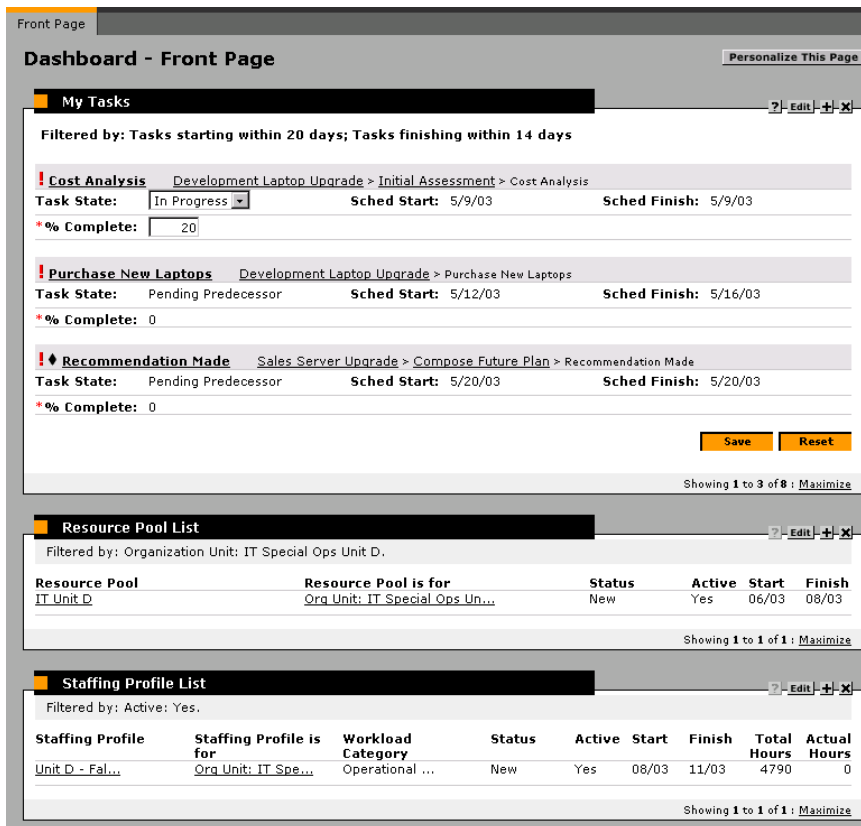
The Time Management process steps are performed using the Activities menu, which displays on the **TIME** menu group in the Kintana interface.



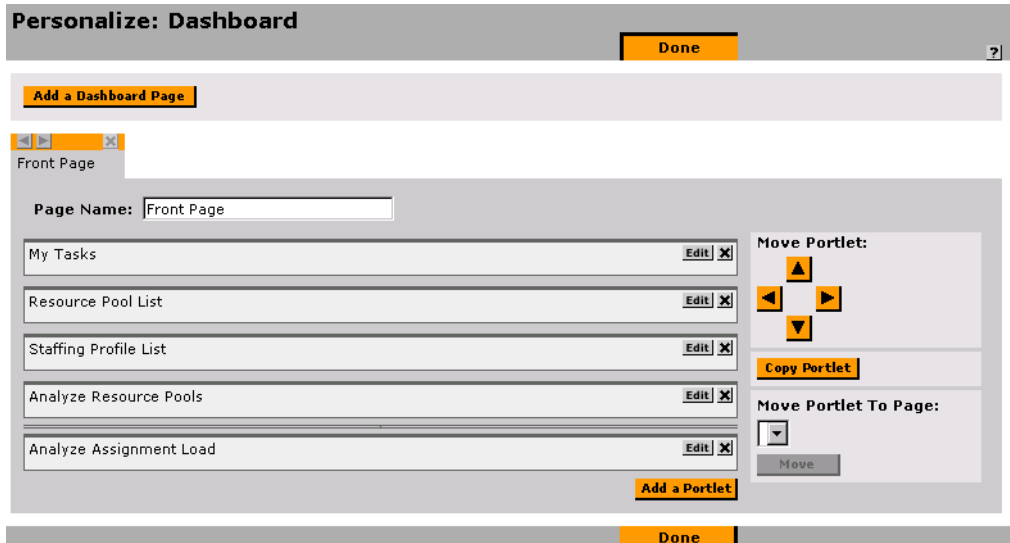
Time Sheets and Allocations also appear in the standard **SEARCH** and **CREATE** menu groups, provided the user has access to them.

To display the **Time Management** page on your Dashboard:

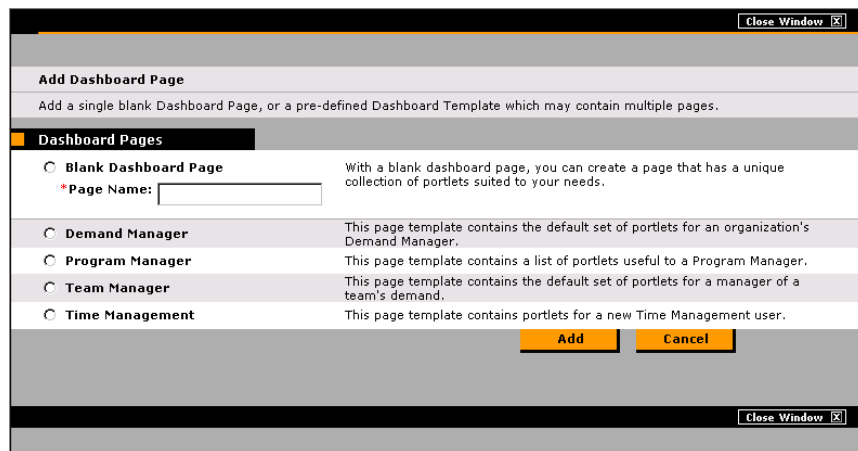
1. Logon to your Kintana Dashboard.



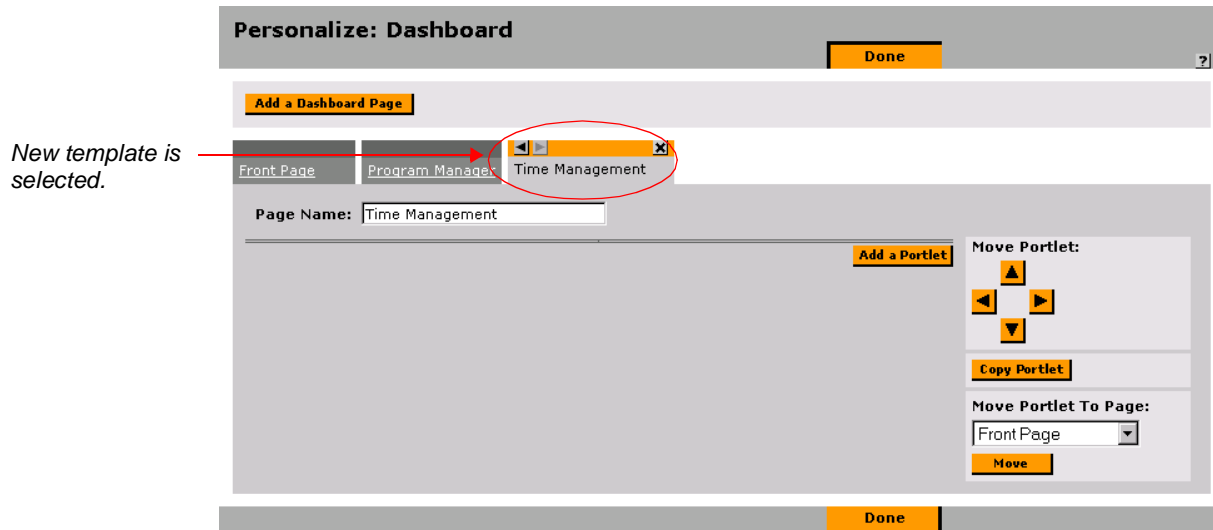
2. Click **PERSONALIZE THIS PAGE**. The **PERSONALIZE: DASHBOARD** page opens.



3. Click **ADD A DASHBOARD PAGE**. The **ADD DASHBOARD PAGE** window opens.



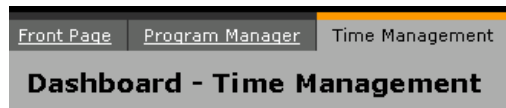
4. Select the **PROGRAM MANAGER** template and click **ADD**. The **PERSONALIZE: DASHBOARD** page reloads with a new Dashboard page appearing to the right of the other pages.



New template is selected.

5. Move the page to the left by clicking the enabled left arrow button above the page name. You can also delete the template by clicking the x button.
6. Click **DONE**.

The template is added as a new page on your Dashboard.



Maintaining Resources

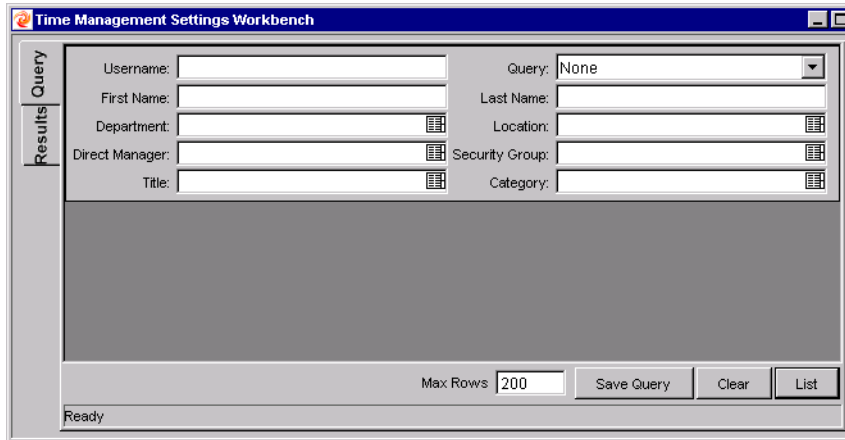
Resources are similar to Users in Kintana, and maintain a one-to-one relationship with a Kintana User.

Resources are maintained by Kintana's Resource Management functionality. For more information on maintaining Resources, see ["Managing Resources in Kintana"](#).

The Time Management Solution requires some additional information, such as Period Type and Time Sheet Approver. The [Time Management Settings](#) screen allows you to view and update Time Management configurations for individual Resources.

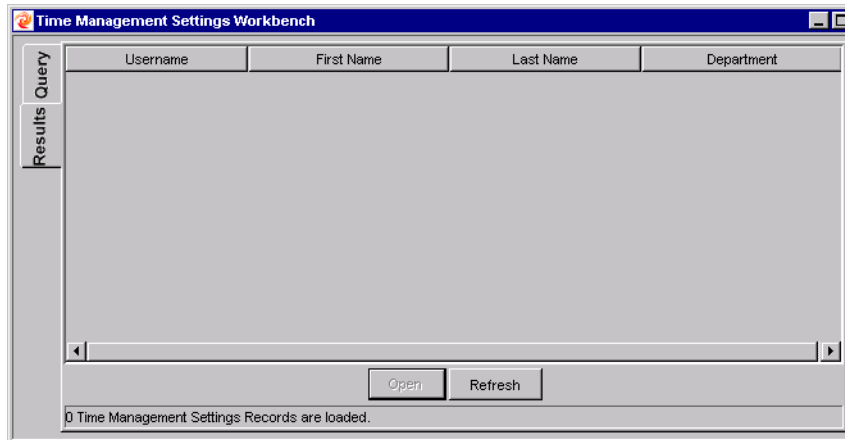
Time Management Settings

The TIME MANAGEMENT SETTINGS WORKBENCH allows you to query for specific Resources or groups of Resources based on fields in the **QUERY** tab. The **QUERY** tab is shown in *Figure 2-7*. Upon completion of the query, the Workbench switches to the **RESULTS** tab, which displays the users that match the search criteria. The **RESULTS** tab is shown in *Figure 2-8*.



The screenshot shows the 'Time Management Settings Workbench' window in the 'Query' tab. The window has a title bar with the text 'Time Management Settings Workbench'. On the left side, there is a vertical tab bar with 'Query' and 'Results' tabs, where 'Query' is selected. The main area contains several input fields: 'Username:', 'First Name:', 'Department:', 'Direct Manager:', and 'Title:' on the left; and 'Query:' (a dropdown menu set to 'None'), 'Last Name:', 'Location:', 'Security Group:', and 'Category:' on the right. Below these fields is a large empty rectangular area. At the bottom right, there are buttons for 'Max Rows' (set to 200), 'Save Query', 'Clear', and 'List'. The status bar at the bottom left shows 'Ready'.

Figure 2-7 Time Management Settings Workbench - Query Tab



The screenshot shows the 'Time Management Settings Workbench' window in the 'Results' tab. The window has a title bar with the text 'Time Management Settings Workbench'. On the left side, there is a vertical tab bar with 'Query' and 'Results' tabs, where 'Results' is selected. The main area displays a table with the following headers: 'Username', 'First Name', 'Last Name', and 'Department'. Below the headers is a large empty rectangular area. At the bottom right, there are buttons for 'Open' and 'Refresh'. The status bar at the bottom left shows '0 Time Management Settings Records are loaded.'.

Figure 2-8 Time Management Settings Workbench - Results Tab

The TIME MANAGEMENT SETTINGS WORKBENCH allows searches based on the following criteria:

Table 2-1. Resource Workbench Fields

Field	Description
USERNAME	Search for Resources linked to a specific Kintana User.
QUERY	Search for Resources using a saved query.
FIRST NAME	Search for Resources with a specific text string in their first name.
LAST NAME	Search for Resources with a specific text string in their last name.
DEPARTMENT	Search for Resources in a specific Department.
LOCATION	Search for Resources in a specific location.
DIRECT MANAGER	Search for Resources with a specific direct manager.
SECURITY GROUP	Search for Resources in a specific set of Security Groups.
TITLE	Search for Resources with a specific job title.
CATEGORY	Search for Resources of a specific category.
MAX ROWS	The maximum number of search results to return.
SAVE QUERY	Opens the SAVE QUERY window, which prompts you for a name for search query to be saved under.
CLEAR	Clears all fields in the QUERY tab.
LIST	Initiates the search.

Time Management Settings Window

The **TIME MANAGEMENT SETTINGS** window is used to view or update Time Management settings for a specific Resource. You can open the **TIME MANAGEMENT SETTINGS** window by selecting a search result in the **Results** tab and clicking **OPEN** in the **TIME MANAGEMENT SETTINGS WORKBENCH**.

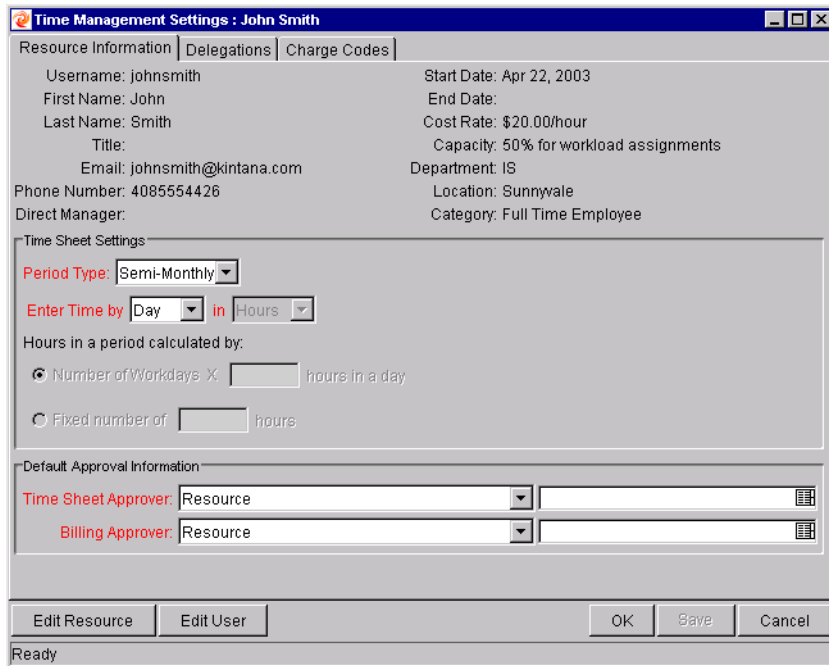


Figure 2-9 Time Management Settings Window

The TIME MANAGEMENT SETTINGS window includes the following sections:

- *Resource Information Tab*
- *Delegations Tab*
- *Charge Codes Tab*

Resource Information Tab

The **RESOURCE INFORMATION** tab displays Resource information and lets you enter basic Time Management information. For details on entering Resource information, see "*Managing Resources in Kintana*".

Table 2-2. Resource Window - Resource Information Tab Fields

Field	Description
Time Sheet Settings	
PERIOD TYPE	Chooses the type of period a Resource enters their time by.

Table 2-2. Resource Window - Resource Information Tab Fields

Field	Description
ENTER TIME BY: (FIELD #1)	These two fields dictate the increments by which the Resource enters time. If time is entered by Day, then Hours is the default choice. If time is entered by Period, then it can be entered in Hours or by Percent.
ENTER TIME BY: (FIELD #2)	
HOURS IN A PERIOD CALCULATED BY	If time is entered by Period in Percentages, the hours in a Period must be calculated using one of two methods: Number of workdays multiplied by the number of hours in a day (configurable), or a fixed number of hours (configurable).
Default Approval Information	
TIME SHEET APPROVER: (FIELD #1)	These two fields indicate the default approvers of Released Time Sheets for this Resource.
TIME SHEET APPROVER: (FIELD #2)	Field #1 indicates whether the value is a specific Resource or a Security Group. If a Security Group is used, then any of the Resources in the specified Security group can query and approve this Resource's Time Sheet. Field #2 is the value of the Resource or Group.
BILLING APPROVER: (FIELD #1)	These two fields indicate the users who can freeze and close Time Sheets for this Resource.
BILLING APPROVER: (FIELD #2)	Field #1 indicates whether the value is a specific Resource or a Security Group. If a Security Group is used, then any of the Resources in the specified Security group can query and freeze/close this Resource's Time Sheet. Field #2 is the value of the Resource or Group.



Only Security Groups with the THIS SECURITY GROUP WILL BE USED BY field enabled for **TIME SHEETS** are considered Resource Groups.

Delegations Tab

The **DELEGATIONS** tab is used to modify user delegations for the given Resource. A delegated user can perform a variety of actions for the Resource, such as modifying the Resource's Time Sheets and approving Time Sheets. Delegations can be useful when a user is on vacation or otherwise unavailable. See "[Delegations](#)" on page xiii for more information.



Note

Resource delegations must be updated through the Kintana Workbench interface by a user with the TIME MGMT EDIT TIME MGMT SETTINGS Access Grant.

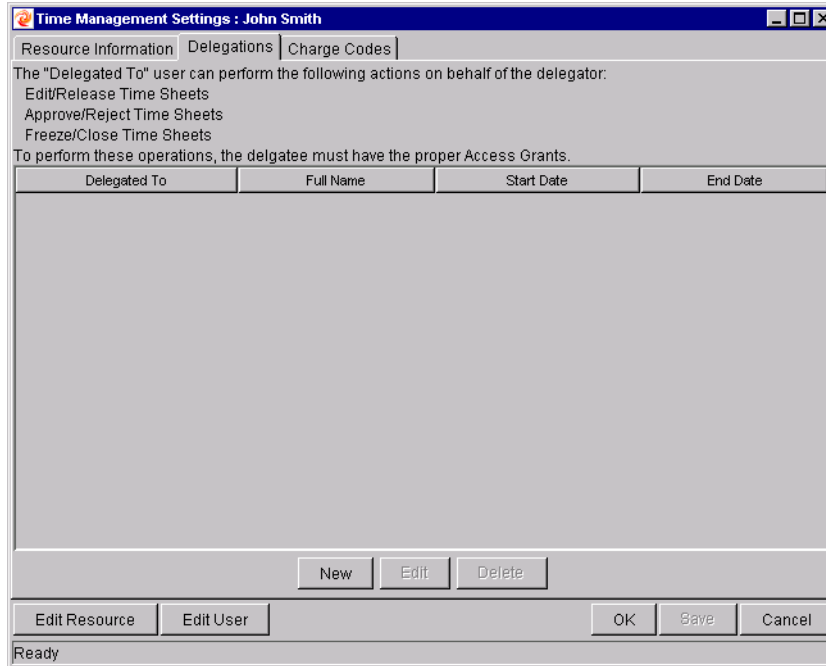


Figure 2-10 Time Management Settings Window – Delegations Tab

Table 2-3. Time Management Settings Window - Delegations Tab Fields

Field	Description
DELEGATED TO	The User name of the delegated user for the Resource.
FULL NAME	The Full name of the delegated user for the Resource.
START DATE	The start date for the user being delegated to the Resource.
END DATE	The end date for the user being delegated to the Resource.
NEW	Opens a Validation window for selecting Resources to include in the Delegations.
EDIT	Opens a Validation window for editing Resources included in the Delegations.
DELETE	Opens a Validation window for deleting Resources from the Delegations.

Charge Codes Tab

The **CHARGE CODES** tab is used to set default Charge Codes to be associated with each line in a Time Sheet for a particular Resource. You can also decide whether Resource-level Charge Codes can override default Charge Codes set by the Work Allocation.

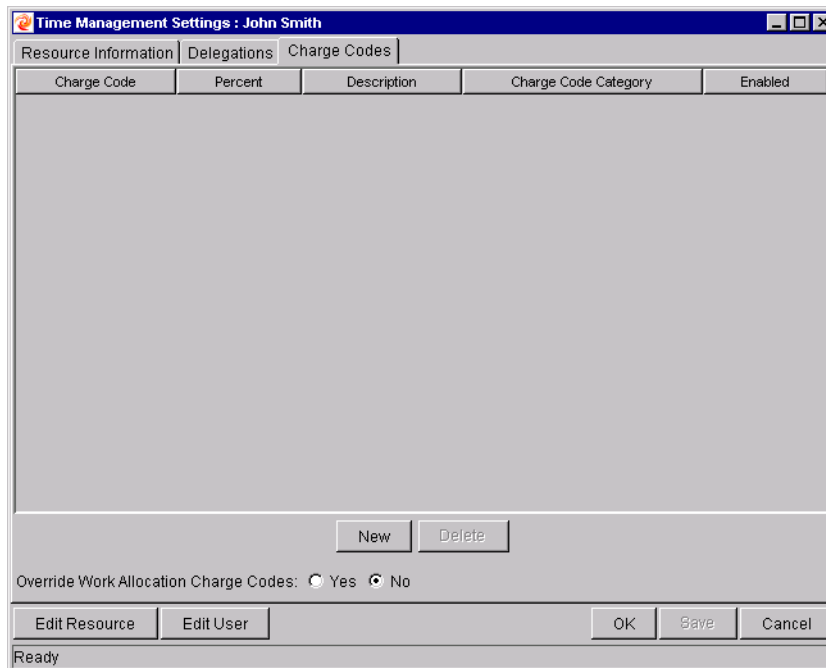


Figure 2-11 Time Management Settings Window – Charge Codes Tab

Table 2-4. Time Management Settings Window - Charge Codes Tab Fields

Field	Description
CHARGE CODE	The Charge Code set as default for the Resource.
PERCENT	An updateable field setting the percent per unit of time for each associated Charge Code. This column must total to 100 for enabled Charge Codes.
DESCRIPTION	The description of the Charge Code.
CHARGE CODE CATEGORY	The category the Charge Code belongs to.

Table 2-4. Time Management Settings Window - Charge Codes Tab Fields

Field	Description
ENABLED	Determines whether or not the Charge Code is enabled.
NEW	Opens a search window for selecting Charge Codes to assign to the Resource.
DELETE	Deletes a selected Charge Code in the Charge Codes tab.
OVERRIDE WORK ALLOCATION CHARGE CODES	Determines whether any existing Charge Codes for the Work Allocation will be overridden by the Resource Charge Codes.

Editing Time Management Settings for a Resource

To edit Time Management settings for a Resource:

1. In the Kintana Workbench, click the **TIME MGMT** screen group and click the **TIME MGMT SETTINGS** screen. The **TIME MANAGEMENT SETTINGS WORKBENCH** opens.
2. Search for the Resource you wish to edit and open it from the **RESULTS** tab.

Time Management Settings : John Smith

Resource Information | Delegations | Charge Codes

Username: johnsmith Start Date: Apr 22, 2003
 First Name: John End Date:
 Last Name: Smith Cost Rate: \$20.00/hour
 Title: Capacity: 50% for workload assignments
 Email: johnsmith@kintana.com Department: IS
 Phone Number: 4085554426 Location: Sunnyvale
 Direct Manager: Category: Full Time Employee

Time Sheet Settings

Period Type: Semi-Monthly

Enter Time by Day in Hours

Hours in a period calculated by:

Number of Workdays X hours in a day

Fixed number of hours

Default Approval Information

Time Sheet Approver: Resource

Billing Approver: Resource

Edit Resource Edit User OK Save Cancel

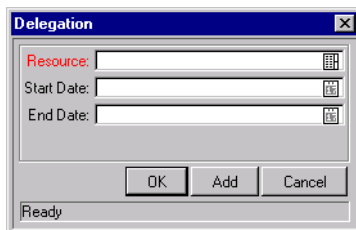
Ready

3. Fill in all required fields and any optional fields in the **RESOURCE INFORMATION** tab.
4. Click the **DELEGATIONS** tab to assign delegates for the Resource. See *“Setting Delegations for a Resource”* on page xxvi for more detailed information.
5. Click the **CHARGE CODES** tab to assign default Charge Codes to the Resource. See *“Setting Charge Codes for a Resource”* on page xxvi for more detailed information.
6. Click **SAVE** to save the Resource’s Time Management settings without closing the TIME MANAGEMENT SETTINGS window, or click **OK** to save the Resource and close the TIME MANAGEMENT SETTINGS window.

Setting Delegations for a Resource

To assign delegated users for the Resource:

1. Open the desired Resource’s TIME MANAGEMENT SETTINGS window.
2. Click the **DELEGATIONS** tab.
3. Click **NEW**. The DELEGATION window opens.



4. Select a Resource to delegate to from the RESOURCE auto-complete list.
5. (Optional) Specify a START and END DATE for the period of delegation.
6. Click **OK**.
7. Click **SAVE** to save the Resource’s Time Management settings without closing the TIME MANAGEMENT SETTINGS window, or click **OK** to save the Resource and close the TIME MANAGEMENT SETTINGS window.

Setting Charge Codes for a Resource

To set default Charge Codes for a Resource:

1. Open the desired Resource's TIME MANAGEMENT SETTINGS window.
2. Click the **CHARGE CODES** tab.
3. Click **NEW**. The CHARGE CODE SELECTION window opens.

4. Enter search criteria for Charge Codes and click **LIST**. The Charge Codes appear in the **QUERY** section of the CHARGE CODE SELECTION window.

Charge Codes are created and maintained from the CHARGE CODE WORKBENCH. See *“Maintaining Charge Codes”* on page xxxvi for more detailed information.

5. Select a Charge Code and click **ADD** to add it to the **CHARGE CODES** tab, or click **OK** to add it to the **CHARGE CODES** tab and close the CHARGE CODE SELECTION window.
6. Click **SAVE** to save the Resource's Time Management settings without closing the TIME MANAGEMENT SETTINGS window, or click **OK** to save the Resource and close the TIME MANAGEMENT SETTINGS window.

Maintaining Time Management Settings for Security Groups

Resources can be collected into standard Kintana Security Groups enabled for Time Management. Such Security Groups are used essentially as a shortcut to refer to the group of users for configuring Charge Code Rules.

For details on creating and maintaining Security Groups, see "[Kintana Security Model](#)".

To activate Time Management for a Security Group, select the **TIME SHEETS** check box for the **THIS SECURITY GROUP WILL BE USED BY** option. The **CHARGE CODE RULES** tab will be enabled.



Note

Time Management screens will refer to Security Groups configured in this way as "Resource Groups."

Security Group Window - Charge Code Rules Tab

The **CHARGE CODE RULES** tab controls Charge Code access for Security Groups that have been enabled for Time Management. The Charge Codes that are visible to a member of the Security Group are specified here. Charge Codes can be restricted by Category, Client, or Department. A Charge Code that satisfies a value set by a Charge Code Rule is visible to a member of the Security Group.



Example

A Charge Code Rule of type **CATEGORY**, with value **BILLABLE**, makes Charge Codes in the **BILLABLE** category visible to a member of the Security Group. All other categories are not displayed.



Note

If a Resource is a member of a Security Group with no restrictions, that Resource will have access to all Charge Codes. For this reason, we recommend enabling Charge Code Rules for all Security Groups.

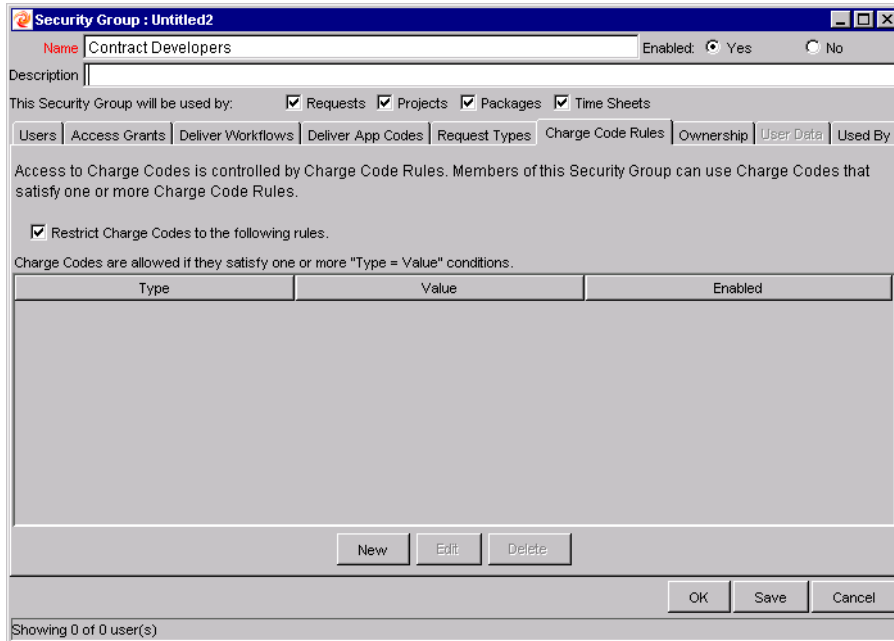


Figure 2-12 Security Group Window - Charge Code Rules Tab Fields

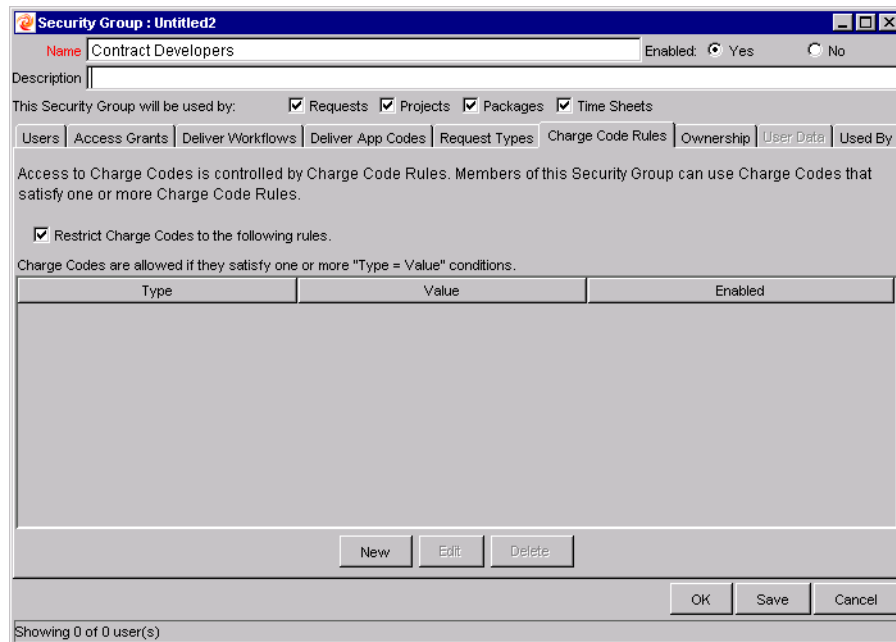
Table 2-5. Security Group Window - Charge Code Rules Tab Fields

Field	Description
RESTRICT CHARGE CODES TO THE FOLLOWING RULES	Determines whether Charge Codes for this Security Group will be restricted. If unchecked, the Security Group will have access to all Charge Codes.
TYPE	The type of Charge Code Rule. Charge Codes can be restricted by CATEGORY , Client , or DEPARTMENT .
VALUE	The value of the Category, Client, or Department for the allowed Charge Code.
ENABLED	Determines whether or not the Charge Code Rule is enabled.
NEW	Opens the CHARGE CODE RULE window to create a new Charge Code Rule.
EDIT	Opens an existing selected Charge Code Rule for editing.
DELETE	Deletes a selected Charge Code Rule.

Creating Charge Code Rules

To create a Charge Code Rule for a Security Group:

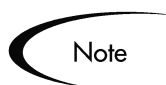
1. Open the desired Security Group or create a new one from the SECURITY GROUP WORKBENCH.
2. Make sure the **TIME SHEETS** check box for the THIS SECURITY GROUP WILL BE USED BY option is enabled.
3. Click the **CHARGE CODE RULES** tab.



The screenshot shows a window titled "Security Group : Untitled2". The "Name" field contains "Contract Developers" and the "Enabled" radio buttons are set to "Yes". The "Description" field is empty. Under "This Security Group will be used by:", the checkboxes for "Requests", "Projects", "Packages", and "Time Sheets" are all checked. The "Charge Code Rules" tab is selected. Below the tabs, a text box states: "Access to Charge Codes is controlled by Charge Code Rules. Members of this Security Group can use Charge Codes that satisfy one or more Charge Code Rules." A checkbox labeled "Restrict Charge Codes to the following rules." is checked. Below this, a text box says "Charge Codes are allowed if they satisfy one or more 'Type = Value' conditions." A table with three columns: "Type", "Value", and "Enabled" is shown, but it is currently empty. At the bottom of the window are buttons for "New", "Edit", "Delete", "OK", "Save", and "Cancel". The status bar at the bottom left shows "Showing 0 of 0 user(s)".

4. By default, the RESTRICT CHARGE CODES TO THE FOLLOWING RULES check box is selected, activating Charge Code restrictions for the Security Group.

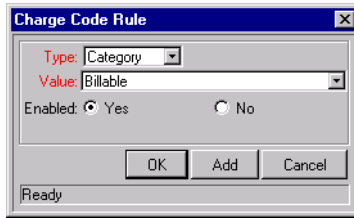
If you wish to make all Charge Codes available for the Security Group, uncheck the box. No further changes are necessary.



Note

If a Resource is a member of a Security Group with no restrictions, that Resource will have access to all Charge Codes. For this reason, we recommend enabling Charge Code Rules for all Security Groups.

5. Click **NEW** to create a new Charge Code Rule. The CHARGE CODE RULE window opens.



6. Select a **TYPE** for the Charge Code Rule, and a **VALUE** for it to satisfy. Enable the rule by selecting **YES**.
7. Click **ADD** to add the Charge Code Rule without closing the **CHARGE CODE RULE** window. Click **OK** to save the Charge Code Rule and close the **CHARGE CODE RULE** window.

Any Charge Code that satisfies the condition set by the Charge Code Rule will be visible to a member of the Security Group.

8. Click **SAVE** to save the Security Group without closing the **SECURITY GROUP** window. Click **OK** to save the Security Group and close the **SECURITY GROUP** window.

Maintaining Activities

An Activity is a categorization of the type of work performed against a Work Item. In addition to tracking the total time spent on a given Item, you might want to track how much of that time was spent performing design work, versus how much time was spent in development or testing. The *Activity Window* lets you create, view and update individual Activities and indicate which Work Item Types they can be used for.

Activity Workbench

The **ACTIVITY WORKBENCH** allows you to query for specific Activities or groups or activities based on fields in the **QUERY** tab. The **QUERY** tab is shown in *Figure 2-13*. Upon completion of the query, the **ACTIVITY WORKBENCH** switches to the **RESULTS** tab which displays the Activities that match the search criteria. The **RESULTS** tab is shown in *Figure 2-14*.

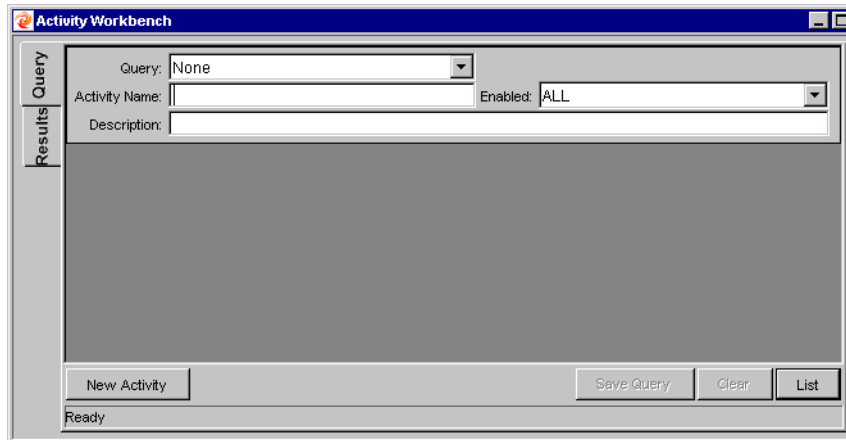


Figure 2-13 Activity Workbench - Query Tab

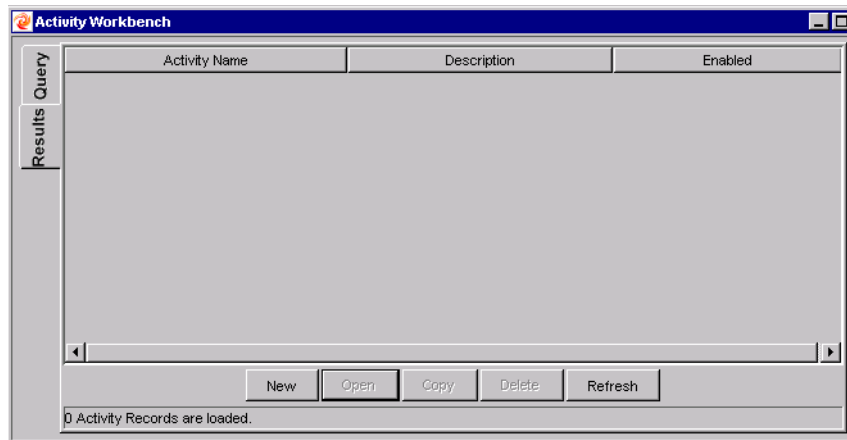


Figure 2-14 Activity Workbench - Results Tab

The ACTIVITY WORKBENCH allows searches based on the following criteria:

Table 2-6. Activity Workbench Fields

Field	Description
QUERY	Search for Activities using a saved query.
NAME	Search for Activities by activity name.
ENABLED	Search for only enabled or disabled Activities, or all.
DESCRIPTION	Search for Activities with a specific text string in their description.

Table 2-6. Activity Workbench Fields

Field	Description
NEW ACTIVITY	Opens the ACTIVITY window, allowing you to create a new Activity.
SAVE QUERY	Opens the SAVE QUERY window, which prompts you for a name for search query to be saved under.
CLEAR	Clears all fields in the QUERY tab.
LIST	Initiates the search.

Activity Window

The ACTIVITY window is used to view or update a specific Activity. You define basic information for the Activity as well as the areas the Activity can be used for. Open the ACTIVITY window by clicking **NEW ACTIVITY** in the ACTIVITY WORKBENCH.

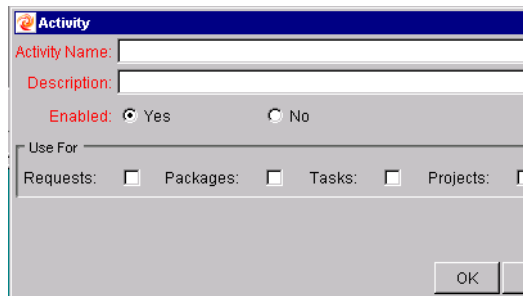


Figure 2-15 Activity Window

Table 2-7. Activity Window Fields

Field	Description
ACTIVITY NAME	The unique name of the Activity.
DESCRIPTION	The displayed description of the Activity.
ENABLED	Determines whether the Activity can be used in new Time Sheets or not.

Table 2-7. Activity Window Fields

Field	Description
USE FOR	<p>Some categories are appropriate for only specific types of Work Items within Kintana. For example, a 'Functional Design' activity might be relevant for Requests, Projects, and Tasks, but not Packages. Use this list of check boxes to indicate where the Activity can be used.</p> <p>When entering time by Activity for a Work Item, only the Activities enabled for the Work Item will be shown.</p>

Creating an Activity

To create a new Activity:

1. In the Kintana Workbench, click the **TIME MGMT** screen group and click the **ACTIVITIES** screen. The **ACTIVITY WORKBENCH** opens.
2. Click **NEW ACTIVITY**. The **ACTIVITY** window opens.

The screenshot shows a window titled "Activity" with the following fields and controls:

- Activity Name:** A text input field.
- Description:** A text input field.
- Enabled:** Radio buttons for "Yes" (selected) and "No".
- Use For:** A group box containing five checkboxes: "Requests", "Packages", "Tasks", "Projects", and "Misc".
- Buttons:** "OK", "Save", and "Cancel" buttons at the bottom right.
- Status:** "Ready" at the bottom left.

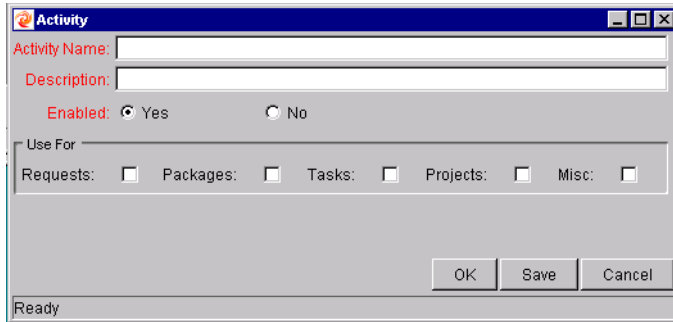
3. Fill in all required fields and any optional fields.
4. Click **SAVE** to save the Activity without closing the **ACTIVITY** window. Click **OK** to save the Activity and close the **ACTIVITY** window.

Editing an Activity

To edit an existing Activity:

1. In the Kintana Workbench, click the **TIME MGMT** screen group and click the **ACTIVITIES** screen. The **ACTIVITY WORKBENCH** opens.

2. Enter any search criteria in the appropriate fields in the **QUERY** tab and click **LIST**. The **RESULTS** tab opens, displaying the results of the search. To display all Activities, click **LIST** without entering any criteria.
3. Select the desired Activity and click **OPEN**. The **ACTIVITY** window opens.

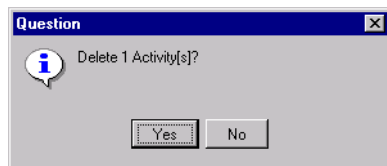


4. Make any desired changes to the Activity.
5. Click **SAVE** to save the Activity without closing the **ACTIVITY** window. Click **OK** to save the Activity and close the **ACTIVITY** window. Click **CANCEL** to close the **ACTIVITY** window without saving any changes.

Deleting an Activity

To delete an Activity:

1. In the Kintana Workbench, click the **TIME MGMT** screen group and click the **ACTIVITIES** screen. The **ACTIVITY WORKBENCH** opens.
2. Enter any search criteria in the appropriate fields in the **QUERY** tab and click **LIST**. The **RESULTS** tab opens, displaying the results of the search. To display all Activities, click **LIST** without entering any criteria.
3. Select the Activity to be deleted and click **DELETE**. A question dialog appears.



4. Click **YES** to delete the Activity.

Maintaining Charge Codes

In some organizations, actual time is used as information for charge backs to the end user (internal or external customer/requestor). While the Kintana Time Management Solution does not explicitly perform this charge back or billing function, it allows you to specify information such as Charge Codes so you can create links between Work Items and your charge accounts. This allows you to easily extract time information for use by your billing systems. Charge Codes do not have hierarchical information or any dependencies. They are simply a list of values. The *Charge Code Window* lets you create, view and update Charge Codes.



Note

In order for newly-created Charge Codes to be visible to a user, that user must be a member of a Security Group with the RESTRICT CHARGE CODES TO THE FOLLOWING RULES field unchecked in the **CHARGE CODES** tab.

Charge Code Workbench

The CHARGE CODE WORKBENCH allows you to query for specific Charge Codes based on fields in the **QUERY** tab. The **QUERY** tab is shown in *Figure 2-16*. Upon completion of the query, the CHARGE CODE WORKBENCH switches to the **RESULTS** tab which displays the Charge Codes that match the search criteria. The **RESULTS** tab is shown in *Figure 2-17*.

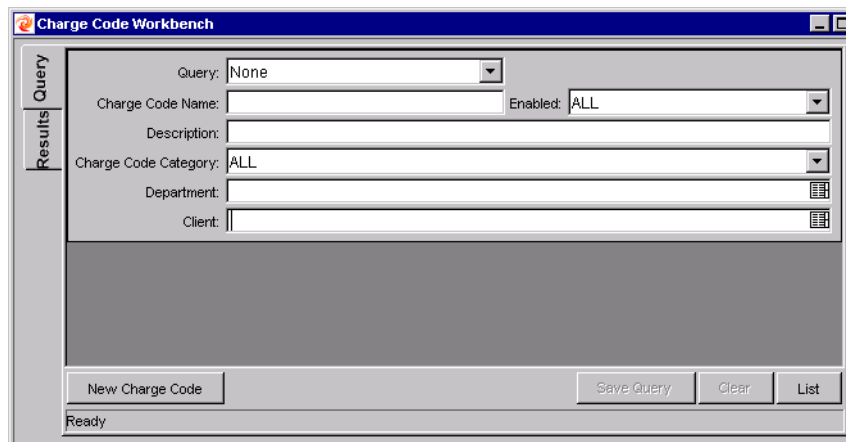


Figure 2-16 Charge Code Workbench - Query Tab

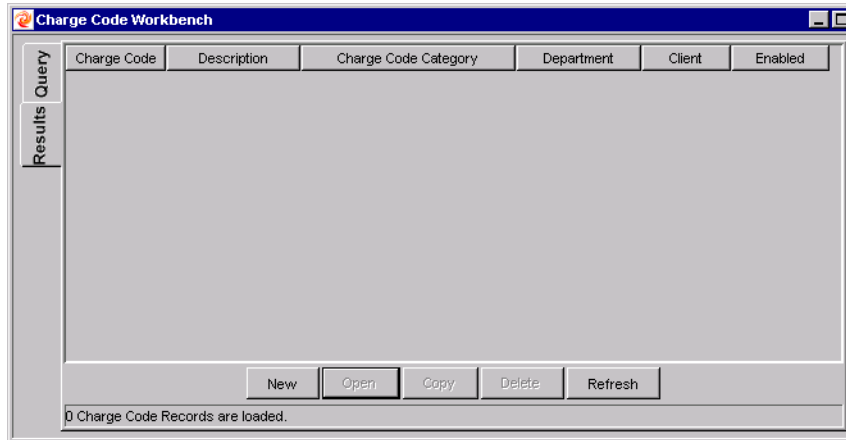


Figure 2-17 Charge Code Workbench - Results Tab

The CHARGE CODE WORKBENCH allows searches based on the following criteria:

Table 2-8. Charge Code Workbench Fields

Field	Description
QUERY	Search for Charge Codes using a saved query.
CHARGE CODE NAME	Search for Charge Codes by Charge Code Name.
ENABLED	Search for only enabled or disabled Charge Codes, or all.
DESCRIPTION	Search for Charge Codes with a specific text string in their description.
CHARGE CODE CATEGORY	Search for Charge Codes by Category.
DEPARTMENT	Search for Charge Codes by Department.
CLIENT	Search for Charge Codes by Client.
NEW CHARGE CODE	Opens the CHARGE CODE window, allowing you to create a new Charge Code.
SAVE QUERY	Opens the SAVE QUERY window, which prompts you for a name for search query to be saved under.
CLEAR	Clears all fields in the QUERY tab.
LIST	Initiates the search.

Charge Code Window

The CHARGE CODE window is used to view or update a specific Charge Code. Open the CHARGE CODE window by clicking **NEW CHARGE CODE** in the CHARGE CODE WORKBENCH.

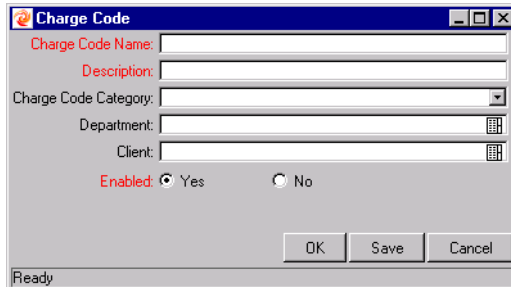


Figure 2-18 Charge Code Window

Table 2-9. Charge Code Window Fields

Field	Description
CHARGE CODE NAME	The name of the Charge Code.
DESCRIPTION	The description of the Charge Code.
CHARGE CODE CATEGORY	The category the Charge Code belongs to.
DEPARTMENT	The department the Charge Code belongs to.
CLIENT	The client associated with the Charge Code.
ENABLED	Determines whether or not the Charge Code is enabled.

Charge Code Behavior

Default Charge Codes can be set for a Time Sheet line according to the following order of precedence:

1. **Set the Charge Codes according to the Work Allocation** — A Work Allocation can have associated Charge Codes and settings to determine if Charge Codes are required and/or updateable. When a user adds a Work

Item to a Time Sheet for the first time, the Work Allocation Charge Codes become assigned to the Time Sheet line if any have been specified.

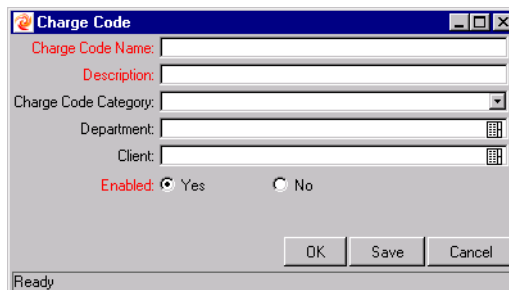
If the Charge Codes are updateable, the user may change them. If the Charge Codes are required, the user must have Charge Codes for the line. If no Charge Codes are entered (and Charge Codes are required), the Time Sheet will show an error message upon submission. Further changes to the Work Allocation after the Time Sheet line has been created are not reflected.

2. **Set the Charge Codes according to the Resource defaults** — The **CHARGE CODES** tab in the TIME MANAGEMENT SETTINGS window allows a user to set default Charge Codes for a Resource. In the absence of Work Allocation Charge Codes, the default Charge Codes for a Resource are set for every Time Sheet line added to a Time Sheet. However, if Work Allocation Charges Codes exist, the **OVERRIDE WORK ALLOCATION CHARGE CODES** flag in the Resource's TIME MANAGEMENT SETTINGS determines which Charge Codes will be applied.
3. **Set the Charge Codes according to the Override Rules** — The last way to set Charge Codes is with Override Rules. If a Rule matches the criteria of the Time Sheet and Charge Codes are present as outputs of the Rule, those Charge Codes will be applied (if none have been applied yet). The Rule takes precedence over Resource Charge Codes and Work Allocation Charge Codes if the appropriate Override flags are set.

Creating a Charge Code

To create a new Charge Code:

1. In the Kintana Workbench, click the **TIME MGMT** screen group and click the **CHARGE CODES** screen. The **CHARGE CODE WORKBENCH** opens.
2. Click **New Charge Code**. The Charge Code window opens.



The screenshot shows a 'Charge Code' dialog box with the following fields and controls:

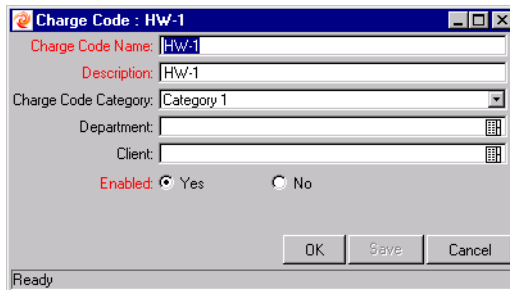
- Charge Code Name: [Text Input]
- Description: [Text Input]
- Charge Code Category: [Dropdown Menu]
- Department: [Text Input]
- Client: [Text Input]
- Enabled: Yes No
- Buttons: OK, Save, Cancel
- Status: Ready

3. Fill in all required fields and any optional fields.
4. Click **Save** to save the Charge Code without closing the Charge Code window. Click **OK** to save the Charge Code and close the Charge Code window.

Editing a Charge Code

To edit an existing Charge Code:

1. In the Kintana Workbench, click the **TIME MGMT** screen group and click the **CHARGE CODES** screen. The **CHARGE CODE WORKBENCH** opens.
2. Enter any search criteria in the appropriate fields in the **QUERY** tab and click **LIST**. The **RESULTS** tab opens, displaying the results of the search. To display all Charge Codes, click **LIST** without entering any criteria.
3. Select the desired Charge Code and click **OPEN**. The **CHARGE CODE** window opens.



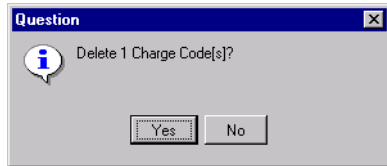
4. Make any desired changes to the Charge Code.
5. Click **SAVE** to save the Charge Code without closing the **CHARGE CODE** window. Click **OK** to save the Charge Code and close the **CHARGE CODE** window. Click **CANCEL** to close the **CHARGE CODE** window without saving any changes.

Deleting a Charge Code

To delete a Charge Code:

1. In the Kintana Workbench, click the **TIME MGMT** screen group and click the **CHARGE CODES** screen. The **CHARGE CODE WORKBENCH** opens.

2. Enter any search criteria in the appropriate fields in the **QUERY** tab and click **LIST**. The **RESULTS** tab opens, displaying the results of the search. To display all Charge Codes, click **LIST** without entering any criteria.
3. Select the Charge Code to be deleted and click **DELETE**. A question dialog appears.



4. Click **YES** to delete the Charge Code.

Maintaining Override Rules

Instead of using default cost rates associated with Resources, you can define Override Rules that will supersede these rates based on specific Time Sheet line information such as Work Item Type and Work item. For example, you might choose to use a non-standard rate for a specific Project. This can be accomplished with an Override Rule. Override Rules can also be used to override Approver information and Charge Codes. The [Override Rule Window](#) allows you to create, view and update individual Override Rules and set both dependencies and results.

Override Rule Workbench

The **OVERWRITE RULE WORKBENCH** allows you to query for specific Override Rules or groups of Override Rules based on fields in the **QUERY** tab. The **QUERY** tab is shown in [Figure 2-19](#). Upon completion of the query, the **OVERWRITE RULE WORKBENCH** switches to the **RESULTS** tab which displays the Override Rules that match the search criteria. The **RESULTS** tab is shown in [Figure 2-20](#).

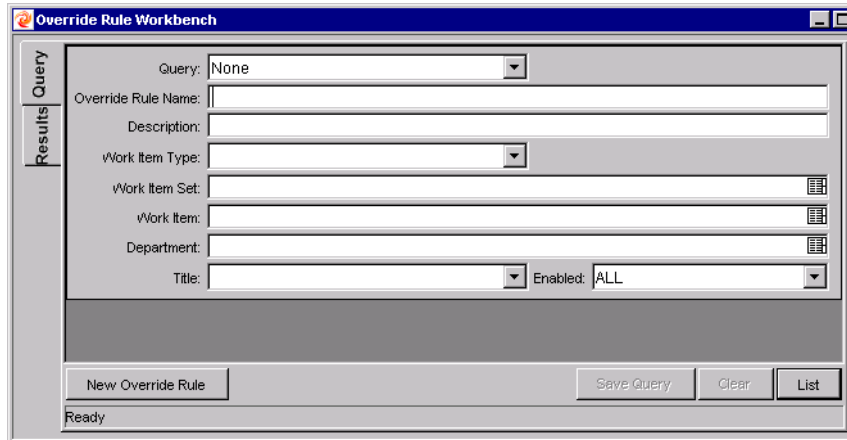


Figure 2-19 Override Rule Workbench - Query Tab

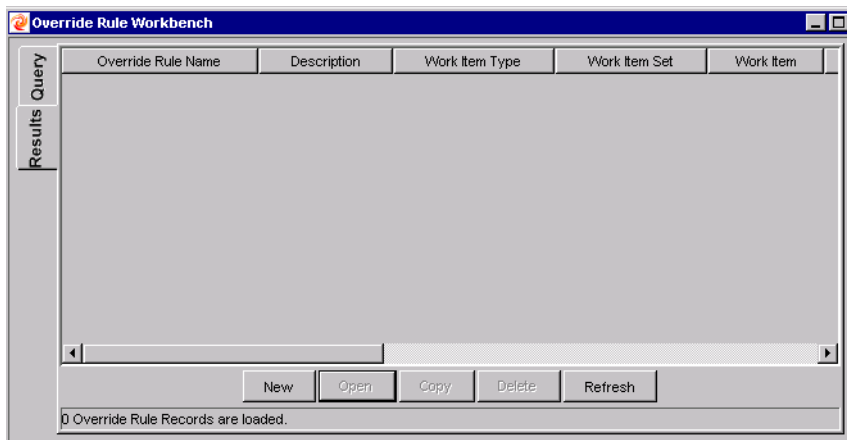


Figure 2-20 Override Rule Workbench - Results Tab

The OVERRIDE RULE WORKBENCH allows searches based on the following criteria:

Table 2-10. Override Rule Workbench Fields

Field	Description
QUERY	Search for Override Rules using a saved query.
OVERRIDE RULE NAME	Search for Override Rule by rule name.
DESCRIPTION	Search for Rules with a specific text string in their description.

Table 2-10. Override Rule Workbench Fields

Field	Description
WORK ITEM TYPE	Search for Rules for a specific Work Item Type (Request, Project, Task, or Package)
WORK ITEM SET	Search for Rules for a specific Work Item Set. Work Item Sets can be a specific Request Type, a specific Master Project, or a specific Package Workflow.
WORK ITEM	Search for Rules for a specific Work Item.
DEPARTMENT	Search for Rules for a specific Department.
TITLE	Search for Rules for a specific Resource Title.
ENABLED	Search for only enabled or disabled Override Rules, or all.
NEW OVERRIDE RULE	Opens the OVERRIDE RULE window, allowing you to create a new Override Rule.
SAVE QUERY	Opens the SAVE QUERY window, which prompts you for a name for search query to be saved under.
CLEAR	Clears all fields in the QUERY tab.
LIST	Initiates the search.

Override Rule Window

The **OVERRIDE RULE** window is used to view or update a specific Override Rule, and define basic information for the Rule (including name, description, and enabled status). You can also identify the values the Rule is active for. These values are referred to as Dependencies. Open the **OVERRIDE RULE** window by clicking **NEW OVERRIDE RULE** in the **OVERRIDE RULE WORKBENCH**.

For Time Sheet lines that match the Rule dependency criteria, you can override cost and/or approval values for those lines.



Note

Approval information can be overridden at the Time Sheet level only. This means that all Time Sheet lines must have overrides to the same approval information to override the defaults for the Time Sheet. However, cost rate information can be at the individual Time Sheet line level.

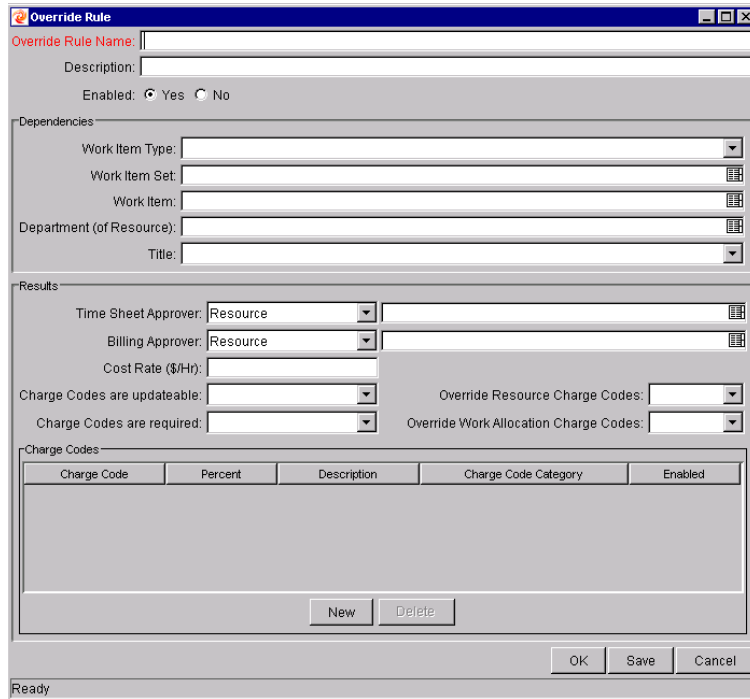


Figure 2-21 Override Rule Window

Table 2-11. Override Rule Window Fields

Field	Description
VERRIDE RULE NAME	The name of the Override Rule.
DESCRIPTION	The description of the Override Rule.
ENABLED	Determines whether the Override Rule is enabled or not.
Dependencies	
WORK ITEM TYPE	This rule is used for Time Sheet lines for a specific Work Item Type (Request, Package, Project, or Task).
WORK ITEM SET	This rule is used for Time Sheet lines for a specific Work Item Set, which can be a specific Request Type, a specific Master Project, or a specific Package Workflow. This field is dependent on the WORK ITEM TYPE value.
WORK ITEM	This rule is used for Time Sheet lines for a specific Work Item, which can be a specific Request, a specific Package, a specific Project, or a specific Task. This field is dependent on the WORK ITEM SET value.

Table 2-11. Override Rule Window Fields

Field	Description
DEPARTMENT (OF RESOURCE)	This rule is used for Time Sheet lines for a specific Department.
TITLE	This rule is used for Time Sheets for Resources with a given Title.
Results	
TIME SHEET APPROVER: (FIELD #1)	These two fields indicate the override Time Sheet approval information.
TIME SHEET APPROVER: (FIELD #2)	Field #1 indicates whether the value is a specific Resource or a Security Group. If a Security Group is used, then any of the Resources in the specified Security group can query and approve this Resource's Time Sheet. Field #2 is the value of the Resource or Group.
BILLING APPROVER: (FIELD #1)	These two fields indicate the override billing approval information (i.e. who can freeze and close a Time Sheet).
BILLING APPROVER: (FIELD #2)	Field #1 indicates whether the value is a specific Resource or a Security Group. If a Security Group is used, then any of the Resources in the specified Security group can query and freeze/close this Resource's Time Sheet. Field #2 is the value of the Resource or Group.
COST RATE	The cost rate (in dollars per hour) to use when calculating cost against a work item.
CHARGE CODES ARE UPDATEABLE	Indicates whether the Charge Codes are updateable after they have been entered by the Rule.
OVERRIDE RESOURCE CHARGE CODES	Indicates whether to override Charge Codes that have been defaulted by the CHARGE CODES tab in the Resource's TIME MANAGEMENT SETTINGS window.
CHARGE CODES ARE REQUIRED	Indicates whether the Charge Codes are required after the Rule is executed.
OVERRIDE WORK ALLOCATION CHARGE CODES	Indicates whether to override Charge Codes that have been defaulted by the Work Allocation.

Table 2-11. Override Rule Window Fields

Field	Description
NEW	Opens the CHARGE CODE SELECTION window for selecting Charge Codes.
DELETE	Deletes selected Charge Codes in the OVERRIDE RULE window.

Override Rule Behavior

Override Rules set Time Sheet attributes at different times. [Table 2-12](#) displays fields that can be set as Override Rule results and the time the Override Rule takes effect.

Table 2-12. Time Sheet Properties Set by Override Rules

Time Sheet Property	Rule Sets Property When
TIME SHEET APPROVER	Time Sheet is saved
BILLING APPROVER	Time Sheet is saved
COST RATE	Time Sheet is saved
CHARGE CODES ARE UPDATEABLE	Time Sheet is saved
CHARGE CODES ARE REQUIRED	Time Sheet is saved
OVERRIDE RESOURCE CHARGE CODES	Time Sheet line is first created
OVERRIDE WORK ALLOCATION CHARGE CODES	Time Sheet line is first created
CHARGE CODES	Time Sheet line is first created

Many Override Rules can match a particular Time Sheet line. When this happens, the Rule that matches the most significant Time Sheet line attribute takes precedence. [Table 2-13](#) displays the order of Override Rule precedence for all possible combinations, including the case where all dependency inputs are blank. This rule will apply to every Time Sheet line and is effectively the global Override Rule if no other Rules have matched.

Table 2-13. Override Rule Precedence for Multiple Match on One Time Sheet Line

Precedence	Work Item Type	Work Item Set	Work Item	Department	Title
1	X	X	X	X	X

Table 2-13. Override Rule Precedence for Multiple Match on One Time Sheet Line

Precedence	Work Item Type	Work Item Set	Work Item	Department	Title
2	X	X	X	X	
3	X	X	X		X
4	X	X	X		
5	X	X		X	X
6	X	X		X	
7	X	X			X
8	X	X			
9	X			X	X
10	X			X	
11	X				X
12	X				
13				X	X
14				X	
15					X
16					

Precedence Examples

Two Override Rules are created with the following dependencies:

Rule	Precedence	Work Item Type	Work Item Set	Department	Title
1	8	Request	Bug		
2	10	Request		Development	

A Resource from the Development department enters Requests on a Time Sheet.

For Work Items that are Requests with Request Type 'Bug,' Rule 1 will take precedence. Other Request Work Items that are not Bugs will have Rule 2 applied, since the Resource is from the Development department. If the Resource were from the Finance department, Rule 2 would not apply.



If the output of a Rule is not set (left blank), other Rules with less precedence will be used.

Suppose the two Override Rules above have the following outputs:

Rule	Precedence	Charge Codes are Required	Charge Codes are Updateable
1	8	Yes	
2	10	No	No

In a case where Rule 1 and Rule 2 both match a Time Sheet line, Rule 2 will always set the “Charge Codes Updateable” attribute to “No” because Rule 1 has left that property unspecified.

Configurable Filters

Filters allow you to limit your Work Items when creating a new Work Allocation or a new Time Sheet entry. They help control the Work Items (Requests, Projects, Tasks, and Packages) that a user can see.

Filters can be configured using the Request Type “TMG Configurable Filters,” which is created during installation. The fields and their layout can be modified with this Request Type.

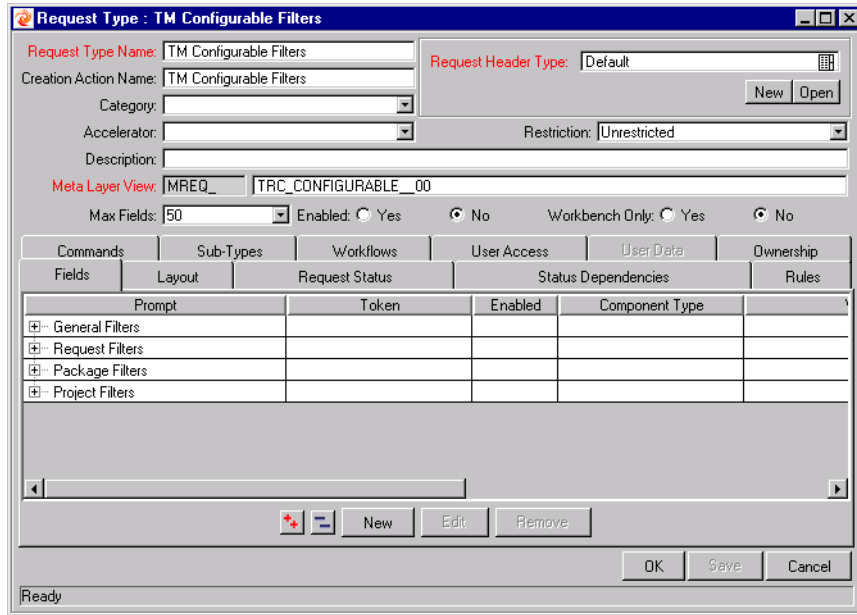


Figure 2-22 TMG Configurable Filters Request Type



Note

By default, the Request Type is disabled and should be left disabled.

The sections of the filter page are represented as tabs:

- General Filters
- Request Filters
- Package Filters
- Project Filters

Custom sections can also be added.



Note

We recommend that you undertake this modification with the help of a Kintana Consultant.

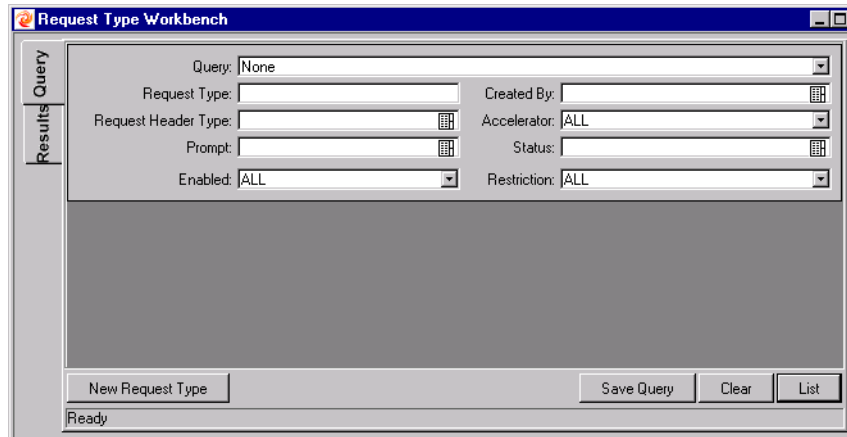
The following steps should be taken when adding a new filter field:

- [Adding a New Filter Field](#)
- [Modifying the Filter Validation SQL](#)

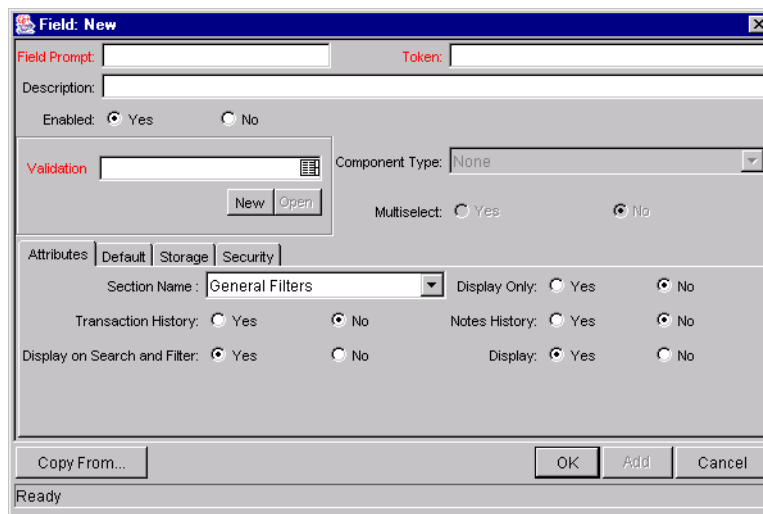
Adding a New Filter Field

To add a new filter field:

1. In the Kintana Workbench, click the **CREATE** screen group and click the **REQUEST TYPES** screen. The **REQUEST TYPE WORKBENCH** opens.



2. Enter "TMG" into the **REQUEST TYPE** field and click **LIST**. The **RESULTS** tab opens with Time Management Request Types loaded.
3. Select the "TMG Configurable Fields" Request Type and click **OPEN**.
4. Click **NEW**. The **FIELD: NEW** window opens.



5. Specify the **FIELD PROMPT**, **TOKEN**, **VALIDATION**, and **TAB NAME** for the new filter field.

6. Click **OK**.

The field has been added to the filter page.

Modifying the Filter Validation SQL

The filter field token now needs to be added to the filter page Validations. These Validations are auto-complete lists validated by SQL. The token is prefixed to “FLTR” internally.

Note

The token MY_CREATION_DATE for a new filter field called “My Creation Date” should be FLTR.MY_CREATION_DATE when used in the Validation SQL.

Note

We recommend that you undertake this modification with the help of a Kintana Consultant.

To modify the filter field Validation SQL:

1. Copy and rename the following Validations, depending on whether you wish to add the custom filter field to the Work Allocations or Time Sheet Details page.
 - TMG - Work Allocation Work Bench - Work Item
 - TMG - Time Sheet Details - Work Item
2. The prefixed custom token should be added to the WHERE clause of the Validation SQL.
3. Update the KNTA_VALIDATION_PROFILES and KNTA_FIELD_FILTERS tables to refer to the new Validations you have created.
 - a. Note the Validation ID for the Validations you have created by running the following SQL:

```
SELECT validation_id
FROM Knta_validations
WHERE validation_name like '%your validation name%'
```

b. The component names for the Work Items fields on the respective pages are:

- Work Allocation Page: WaDfWorkItem
- Time Sheet Details Page: TsWwRsWorkItem

Update the KNTA_VALIDATION_PROFILES table by running the following SQL:

For updating the Work Item Component on the Work Allocations page:

```
UPDATE Knta_Validation_Profiles
SET validation_id = <your validation id>
WHERE component_name = WaDfWorkItem
UPDATE KNTA_Field_Filters
SET validation_id = <your validation id>
WHERE field_filter_id = 30001
```

For updating the Work Item Component on the Time Sheet Details page:

```
UPDATE Knta_Validation_Profiles
SET validation_id = <your validation id>
WHERE component_name = 'TsWwRsWorkItem'
UPDATE KNTA_Field_Filters
SET validation_id = <your validation id>
WHERE field_filter_id = 30000
```

The KNTA_VALIDATION_PROFILES and KNTA_FIELD_FILTERS tables should now refer to the new Validations, so they can be picked up.

The original Validation ID is stored in the column original_validation_id if the changes need to be reverted.

Integration with Kintana Drive

To avoid dual data entry, Kintana Time Management and Kintana Drive can be integrated to allow Time Sheets to update Actual Effort and/or Actual Costs for Project Tasks. The following functionality applies:

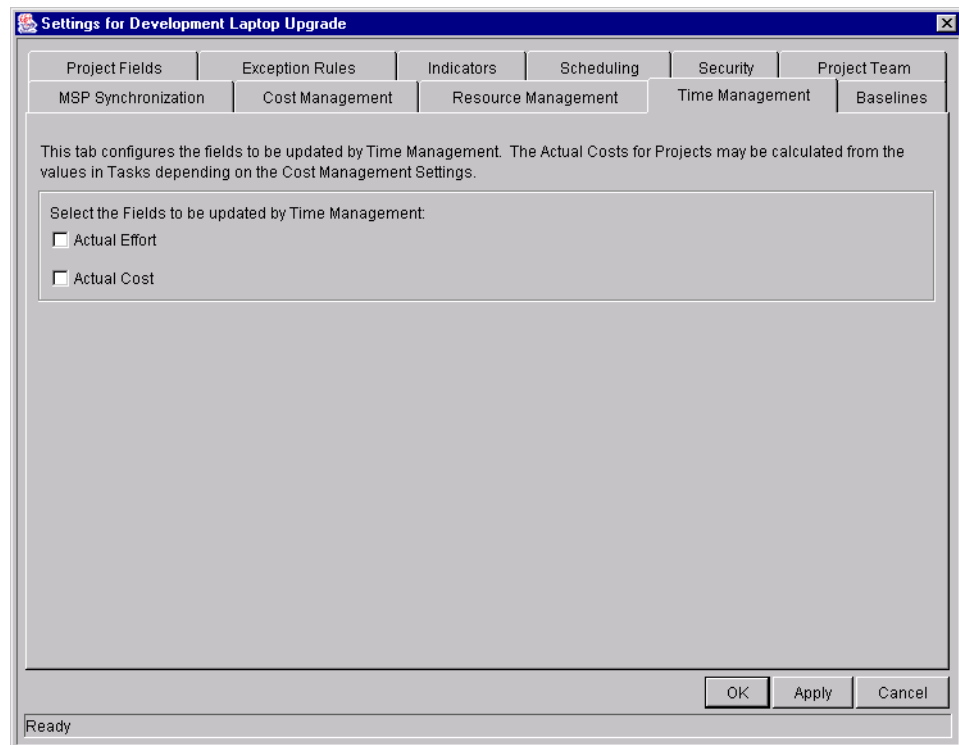
- Updates from Time Management overwrite any updates to ACTUAL EFFORT made in Drive.

- Updates to Task ACTUAL EFFORT and ACTUAL COST in Drive do not update Time Sheets.
- ACTUAL EFFORT/ACTUAL COST is updated every time the user saves the Time Sheet and a change in the ACTUAL EFFORT/ACTUAL COST is detected. If the Project can't be locked for editing, the Time Sheet will not save and an error message will appear.

For more detailed information on effort and Cost in Kintana Drive, see ["Working with Projects"](#).

In order to properly integrate Kintana Time Management and Kintana Drive:

1. In the Kintana Workbench, open the Project you wish to integrate with Time Management.
2. Select **PROJECT -> SETTINGS**. The SETTINGS window opens. Click the **TIME MANAGEMENT** tab.



3. Select the fields you wish to be updated by Time Sheets. If you have not enabled Cost Management for your Project, the ACTUAL COST option will not be selectable.
4. Click **OK**.

Other Time Management Validations

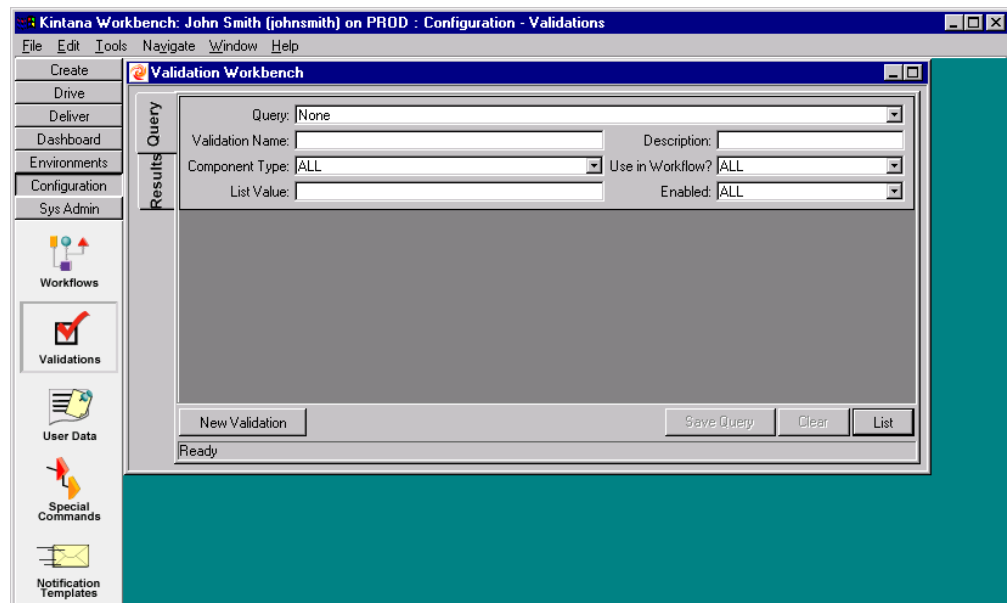
The Time Management Solution includes several Kintana Validations that can be customized to better suit your business needs.

- **TMG - Charge Code Categories - Enabled** — Configures the list of possible Charge Code Categories. Charge Code Categories can be used to restrict Charge Code access on the **CHARGE CODE RULES** tab of the Security Group window.
- **TMG - Clients - Enabled** — Configures the list of possible Clients. ‘Client’ is an attribute of a Charge Code that can be used to restrict Charge Code access in the **CHARGE CODE RULES** tab of the Security Group window.
- **TMG - Misc. Work Items** — Configures the list of possible miscellaneous, untrackable Work Items such as Vacation or Meetings.

Modifying Time Management Validations

To modify a Time Management Validation:

1. In the Kintana Workbench, click the **CONFIGURATION** screen group and click the **VALIDATIONS** screen. The **VALIDATION WORKBENCH** opens.



2. Enter “TMG” into the **VALIDATION NAME** field and click **LIST**. The **RESULTS** tab opens with the Time Management Validations loaded.
3. Select the Validation you wish to edit and click **OPEN**.

4. Make any desired changes to the Validation. Refer to the Validations appendix in *"Configuring a Request Resolution System"* or *"Configuring a Deployment System in Kintana"* for more detailed information on altering Validations.
5. Click **SAVE** to save the Validation without closing the VALIDATION window. Click **OK** to save the Validation and close the VALIDATION window. Click **CANCEL** to close the VALIDATION window without saving any changes.

Time Management and the Kintana Dashboard

In addition to participating in the Time Management process through the Work Allocation and Time Sheet screens, you can see Time Management information in real-time through the Kintana Dashboard. You can personalize your Dashboard with Time Management specific portlets to see actions you need to take as well as actual versus budgeted time information.

You can filter these portlets to see time information for specific resources or work items and can aggregate information in a variety of combinations. You can drill down from these portlets to specific allocations and Time Sheets. The following portlets are available with a Kintana Time Management Solution and a Kintana Dashboard license. *Table 2-14* lists and describes the available Time Management portlets. Detailed descriptions of each portlet are provided in the sections following the table.

Table 2-14. Kintana Time Management Portlets

Kintana Time Management Portlet	Description
TMG - Actuals for Direct Reports	The TMG - Actuals for Direct Reports portlet shows a Manager the time charged by their direct reports, allowing them to see what their team has been working on.
My Time Sheets	The My Time Sheets portlet is similar to the My Requests and My Packages portlets but does not have any parameters. It lists all the open Time Sheets for the user, and can list frozen or closed Time Sheets as well.

Table 2-14. Kintana Time Management Portlets

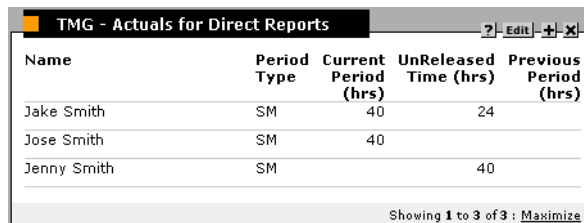
Kintana Time Management Portlet	Description
My Work Items	<p>The My Work Items portlet is similar to the My Requests and My Packages portlets but does not have any parameters. It lists all the Work Items on open Time Sheets for the user.</p> <p>This portlet gives users a quick snapshot of what they have been working on and to which they are currently charging time.</p>
TMG - Resource Group Total by Work Item	<p>The TMG - Resource Group Total by Work Item portlet shows the time charged by Resource Groups. It summarizes the totals of all the Resources in those groups, but segments this information by each specific Work Item.</p>
TMG - Resource Group Totals	<p>The TMG - Resource Group Totals portlet shows the time charged by Resource Groups. It summarizes the totals of all the Resources in those groups, and lets you see the level of activity (by time) in the current and previous periods for these groups.</p>
TMG - Resource Totals	<p>The TMG - Resource Totals portlet shows the time charged by a set of Resources, letting you see the level of activity (by time) in the current and previous period for these users.</p>
TMG - Total Hrs by Work Item	<p>The TMG - Total Hrs by Work Item portlet gives detail information on the time allocated to and the time charged for specific Work Items (Requests, Projects, Tasks or Packages).</p>
TMG - Work Allocation Details	<p>The TMG - Work Allocation Details portlet lets you list summary information on the Work Allocations defined in the system.</p> <p>This portlet lets you see which allocations are close to being used up or actually are over budget.</p>
TMG - Work Item Set Budgets and Actuals	<p>The TMG - Work Item Set Budgets and Actuals portlet lets you list summary information at the Work Item Set level (such as a Request Type, Master Project or Package Workflow.)</p> <p>This portlet is useful for getting a snapshot of which Projects or types of activities you are spending the most time on, as well as where you have budgeted the most time.</p>

TMG - Actuals for Direct Reports Portlet

The TMG - Actuals for Direct Reports portlet shows a Manager the time charged by their direct reports, allowing them to see what their team has been working on. It can be filtered by Manager.

This portlet shows the following information:

- The names of the Resources under the Manager
- The Period Type for each Resource under the Manager
- The time charged by each Resource's Time Sheets in the current Time Period
- The unreleased Time Sheet totals for each Resource
- The time charged by each Resource's Time Sheets in the previous Time Period



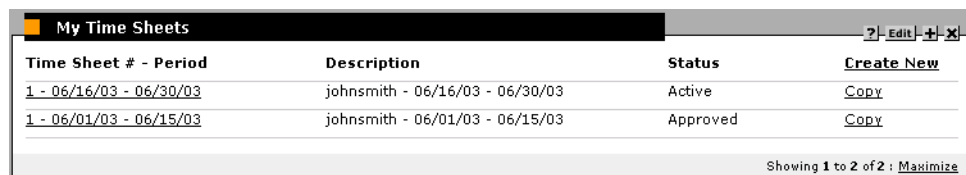
Name	Period Type	Current Period (hrs)	UnReleased Time (hrs)	Previous Period (hrs)
Jake Smith	SM	40	24	
Jose Smith	SM	40		
Jenny Smith	SM		40	

Figure 2-23 TMG - Actuals for Direct Reports portlet

My Time Sheets Portlet

The My Time Sheets portlet is similar to the My Requests and My Packages portlets but does not have any parameters. It lists all the open Time Sheets for the user, and can list frozen or closed Time Sheets as well.

You can create a new Time Sheet or copy an existing listed Time Sheet from the My Time Sheets portlet.



Time Sheet # - Period	Description	Status	Create New
1 - 06/16/03 - 06/30/03	johnsmith - 06/16/03 - 06/30/03	Active	Copy
1 - 06/01/03 - 06/15/03	johnsmith - 06/01/03 - 06/15/03	Approved	Copy

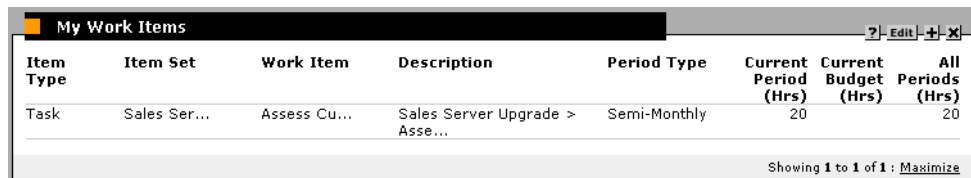
Figure 2-24 My Time Sheets portlet

My Work Items Portlet

The My Work Items portlet is similar to the My Requests and My Packages portlets but does not have any parameters. It lists all the Work Items on open Time Sheets for the user.

This portlet gives users a quick snapshot of what they have been working on and to which they are currently charging time. Items on the portlet list the Work Item information, as well as:

- **Period Type:** the Period Type the time was logged against.
- **Current Period (Hrs):** the total time charged to this Work Item in the current period by the logged-on user.
- **Current Budget (Hrs):** the time budgeted for the work item (if a Work Allocation exists).
- **All Periods (Hrs):** the total time that the logged-on user has charged to date for this item.



Item Type	Item Set	Work Item	Description	Period Type	Current Period (Hrs)	Current Budget (Hrs)	All Periods (Hrs)
Task	Sales Ser...	Assess Cu...	Sales Server Upgrade > Asse...	Semi-Monthly	20	20	20

Figure 2-25 My Work Items Portlet

TMG - Resource Group Total by Work Item Portlet

The TMG - Resource Group Total by Work Item portlet shows the time charged by Resource Groups. It summarizes the totals of all the Resources in those groups, but segments this information by each specific Work Item.

The portlet shows the following information:

- Resource Group
- Work Item information
- Period Type
- Total time entered by the Resources in the group for that item in the current period

- Current budget for the Work Item. This is the allocated budget for all work items that the Resource Group has on their Time Sheets for the *current and previous* time periods.
- Total Actuals to Date for the item. This includes all items for the resource in the Resource Group in the *current and previous* time periods.

This portlet is useful when looking at the work being done by a specific Resource Group.

TMG - Resource Group Total by Work Item							
Resource Group	Item Type	Work Item	Description	Period Type	Current Period (Hrs)	Current Budget (Hrs)	Total Actuals (Hrs)
Kintana Administrator	Request	30006	Need new financial reportin...	Semi-Monthly	24		24
Kintana Administrator	Request	30000	CRM Implementation	Semi-Monthly	16		16
Kintana Administrator	Request	30001	Customer Connect	Semi-Monthly	17		17
Kintana Administrator	Request	30007	test	Semi-Monthly	16		16
Kintana Administrator	Request	30008	Update financial system.	Semi-Monthly	12		12

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Figure 2-26 TMG - Resource Group Total by Work Item Portlet

Table 2-15. TMG - Resource Group Total by Work Item Portlet

Parameter	Description
Resource Group	Shows only specific Resource Groups.
Work Item Type	Limits items to those of a specific Work Item Type (Package, Request, Project or Task).
Work Item Set	Limits items to those of a specific Work Item Set (Request Type, Master Project or Package Workflow). The Work Item Type parameter must be filled in for this parameter to be active.
Work Item	Limits results of a specific Work Item (Request, Project, Task or Package). The Work Item Set parameter must be filled in for this parameter to be active.
Actual/Budget Over	Only show items where the Actuals to Date/Current Budget ratio is over the specific percentage. This parameter is useful to see items that are over budget.
Current Time Over (Hrs)	Only show items with time charged in the current period over a specific number of hours. Use this parameter to see the items with the most current activity.

Table 2-15. TMG - Resource Group Total by Work Item Portlet

Budget Over (Hrs)	Only show items with Current Budgets over a specific number of hours.
Actuals to Date Over (Hrs)	Only show items with Actuals to Date over a specific number of hours.
Period Type	Limit items by Period Type.

TMG - Resource Group Totals Portlet

The TMG - Resource Group Totals portlet shows the time charged by Resource Groups. It summarizes the totals of all the Resources in those groups, and lets you see the level of activity (by time) in the current and previous periods for these groups.

The portlet shows the following information:

- Resource Group
- Total time entered by the Resources in the group for the current and previous period
- Current budget for the Work Items used by Resources in the group. This is the allocated budget for the *current and previous* time periods.
- Total Actuals to Date for the Work Items used by Resources in the group. This includes all items in the *current and previous* time periods.

Resource Group	Period Type	Current Period (Hrs)	Previous Period (Hrs)	Current Budget (Hrs)	Total Actuals (Hrs)
Kintana Administrator	Semi-Monthly	164	0	164	164

Showing 1 to 1 of 1 : Maximize

Figure 2-27 TMG - Resource Group Totals Portlet Parameters

Table 2-16. TMG- Resource Group Totals Portlet Parameters

Parameter	Description
Resource Groups	Limit the results to a set of Resource Groups.
Period Type	Limit the results to those Resource Groups logging time against one or more Period Types.

TMG - Resource Totals Portlet

The TMG - Resource Totals portlet shows the time charged by a set of Resources, letting you see the level of activity (by time) in the current and previous period for these users.

The portlet shows the following information:

- Resource name
- Period Type
- Total time entered by the Resource in the current and previous period
- Total budget for the Work Items used by the Resource. This is the allocated budget for the *current and previous* time periods.
- Total Actuals to Date for the Work Items used by the Resource. This includes all items in the *current and previous* time periods.

Resource Name	Period Type	Current Period (Hrs)	Previous Period (Hrs)	Current Budget (Hrs)	Total Actuals (Hrs)
Jake Smith	Semi-Monthly	64	0	64	64
Jenny Smith	Semi-Monthly	40	0	40	40
John Smith	Semi-Monthly	20	0	20	20
Jose Smith	Semi-Monthly	40	0	40	40

Figure 2-28 TMG - Resource Totals Portlet Parameters

Table 2-17. TMG - Resource Total Portlet Parameters

Parameters	Description
Resource Groups	Limits the results to Resources in a set of Resource Groups. This parameter is useful to create a portlet to show the time activity for a specific team of users.
Resource	Limits the results to the set of specified Resources.
Period Type	Limit the results to those logging time against one or more Period Types.

TMG - Total Hrs by Work Item Portlet

The TMG - Total Hrs by Work Item portlet gives detail information on the time allocated to and the time charged for specific Work Items (Requests, Projects, Tasks or Packages).

The portlet shows the following information:

- Work Item Type
- Item name
- Item description
- Period Type
- Current budget (if a Work Allocation exists). This is the allocated budget for the *current and previous* time periods.
- Total time charged to this Work Item in the current period by all users. This includes all items in the *current and previous* time periods.
- Total time charged to date for this item

This portlet should not be used to display time information for all Work Items, but for a set of items based on criteria such as type of item, amount of time, or Actuals versus budget.

Item Type	Item Set	Work Item	Description	Period Type	Current Period (Hrs)	Current Budget (Hrs)	Total Actuals (Hrs)
Request	DEM - Initia...	30006	Need new fin...	Semi-Monthly	24		24
Package	Dev -> Test ...	30004	Patching the...	Semi-Monthly	7		7
Package	Dev -> Test ...	30018	Production U...	Semi-Monthly	10		10
Project	Kintana Port...	Business ...	Kintana Port...	Semi-Monthly	5		5
Task	Kintana Port...	Analyze d...	Kintana Port...	Semi-Monthly	11		11

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Figure 2-29 TMG - Total Hours By Work Item Portlet Parameters

Table 2-18. TMG - Total Hours By Work Item Portlet Parameters

Parameters	Description
Resource	Only show Work Items that display on Time Sheets of one or more users. This parameter is useful to see the Work Items being worked on by a specific team of Resources.

Table 2-18. TMG - Total Hours By Work Item Portlet Parameters

Work Item Type	Limits items to those of a specific Work Item Type (Package, Request, Project or Task).
Work Item Set	Limits items to those of a specific Work Item Set (Request Type, Master Project or Package Workflow). The Work Item Type parameter must be filled in for this parameter to be active.
Work Item	Limits results of a specific Work Item (Request, Project, Task or Package). A maximum of one row is returned when this parameter is used. The Work Item Set parameter must be filled in for this parameter to be active.
Actual/Budget Over	Only show items where the Actuals to Date/Current Budget ratio is over the specific percentage. This parameter is useful to see items that are over budget.
Current Time Over (Hrs)	Only show items with time charged in the current period over a specific number of hours. Use this parameter to see the items with the most current activity.
Budget Over (Hrs)	Only show items with Current Budgets over a specific number of hours.
Actuals to Date Over (Hrs)	Only show with Actuals to Date over a specific number of hours.
Period Type	Limit items by Period Type.

TMG - Work Allocation Details Portlet

The TMG - Work Allocation Details portlet lets you list summary information on the Work Allocations defined in the system. This portlet lets you see which allocations are close to being used up or actually are over budget.

The portlet shows the following information:

- Work Item Type
- Work Item Set
- Specific Work Item
- Work item description for the Allocation
- Current allocation budget

- Total actuals against this Work Item
- Real-time percentage of Actuals to budget

A hyperlink on the Work Item Type lets you navigate directly to the specific Work Allocation in the Work Allocation Details screen. This portlet does not show Allocations that have already been Closed.

Item Type	Item Set	Work Item	Description	Current Budget (Hrs)	Total Actuals (Hrs)	Actual / Budget %
Task	Develop...	Cost An...	Development Lapto...		0	
Task	Develop...	Image O...	Development Lapto...		0	
Task	Sales S...	Vet Pos...	Sales Server Upgr...		0	
Task	Sales S...	Discuss...	Sales Server Upgr...		0	

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Figure 2-30 TMG - Work Allocation Details Portlet Parameters

Table 2-19. TMG - Work Allocation Details Portlet Parameters

Parameters	Description
Resource Group	Only show Work Allocations with Resource restrictions that have one or more of the selected Resource Groups.
Resource	Only show Work Allocations with Resource restrictions with one or more of the selected Resources.
Work Item Type	Limits Allocations to those of a specific Work Item Type (Package, Request, Project or Task).
Work Item Set	Limits Allocations to those of a specific Work Item Set (Request Type, Master Project or Package Workflow). The Work Item Type parameter must be filled in for this parameter to be active.
Work Item	Limits Allocations to those of a specific Work Item (Request, Project, Task or Package). The maximum number of allocations returned is one when this parameter is used. The Work Item Set parameter must be filled in for this parameter to be active.

Table 2-19. TMG - Work Allocation Details Portlet Parameters

Actual/Budget Over	<p>Only show Allocations where the Actuals to Date/Current Budget ratio is over the specific percentage. This parameter is useful to see Allocations that are close to being fully used or are over budget.</p> <p>Note: When this parameter is used, Allocations with 0 Current Budget are ignored.</p>
Budget Over (Hrs)	<p>Only show Allocations with Current Budgets over a specific number of hours. Use this parameter to see just the larger items.</p>

TMG - Work Item Set Budgets and Actuals Portlet

The TMG - Work Item Set Budgets and Actuals portlet lets you list summary information at the Work Item Set level (such as a Request Type, Master Project or Package Workflow.) A Work Item Set can be a Request Type, a Master Project, or a Package Workflow.

This portlet is useful for getting a snapshot of which Projects or types of activities (such as Enhancement Requests or Bug Fixes) you are spending the most time on, as well as where you have budgeted the most time.

The portlet shows the following information:

- All Work Item Sets meeting the selection criteria and that have time charged against them in the current period or the previous period
- Work Item Type
- Work Item Set name
- Period Type
- Number of specific Work items that are in the Work Item Set and have had time charged to them in the current or previous periods
 - o Total budget (from defined Work Allocations) for those items
 - o Total Actuals to Date for those items. This lists only the items included in the *current and previous* time periods.
 - o The time charged against those items in the current period

- o The amount charged against those items in the previous period

Item Type	Item Set	Period Type	# of Items	Current Budget (Hrs)	Total Actuals (Hrs)	Current Period (Hrs)	Previous Period (Hrs)
Misc	Misc. Items	Semi-Monthly	2		14	14	0
Package	Dev -> Test -> Prod	Semi-Monthly	2		17	17	0
Project	Kintana Portfolio Management Pilot	Semi-Monthly	1		5	5	0
Request	DEM - Initiative	Semi-Monthly	1		24	24	0
Request	PFM - Project Request	Semi-Monthly	4		61	61	0

Showing 1 to 5 of 7 : [Maximize](#)

Figure 2-31 TMG - Work Item Set Budgets and Actuals Portlet Parameters

Table 2-20. TMG - Work Item Set Budgets and Actuals Portlet Parameters

Parameters	Description
Work Item Type	Limits results to those of a specific Work Item Type (Package, Request, Project or Task).
Work Item Set	Limits results to those of a specific Work Item Set (Request Type, Master Project or Package Workflow). The maximum number of rows returned is one when this parameter is used. The Work Item Type parameter must be filled in for this parameter to be active.
Count Over	Limits results to Work Item Sets with more than the specific Work Items that have time charged against them in the current or previous period. Use this portlet to filter for high volume Work Item Sets (in terms of individual items).
Budget Over (hrs)	Limits results to only those Work Item Sets with Work Items whose budget totals over the specified value.
Actuals Over (hrs)	Limits results to only those Work Item Sets with Work Items totaling Actuals to Date over the specified value.
Actual/Budget Over (%)	Limits results to only those Work Item Sets where the total Actuals to Date/Total Current Budget is over a given percentage. This restriction is for the total values and not the actuals to budget percentages of the individual items.
Period Type	Limit items by Period Type.

Time Management Reports

This section lists all of the standard reports that are available in Kintana Time Management Solution. All of these reports are database based programs that create a textual report viewed through a Web browser. For each report, this section lists and describes the screen parameters.

TMG - Time Sheet Details Report

The TMG - Time Sheet Details Report lets you report on multiple Time Sheets at once and view their details.

The report displays the following information:

- Header information
- Daily time information
- Line information, such as:
 - o Work Item
 - o Actuals to date
 - o Charge Code
 - o Activity information
 - o Notes details

Figure 2-32 TMG - Time Sheet Details Report Parameters

Table 2-21. TMG - Time Sheet Details Report Parameters

Fields	Description
TIME PERIOD	Shows Time Sheets for a specific set of time periods.
RESOURCE	Only show Time Sheets for a specific set of users.
RESOURCE GROUP	Only show Time Sheets for Resources in a set of Resource Groups.
TIME SHEET #	Only show Time Sheets with a specific number. A unique sequence number is assigned when there are multiple Time Sheets for a Resource in the same time period.
TIME SHEET STATUS	Only show Time Sheets currently at a specific status.
ORDER BY	Determines how to order the list of Time Sheets if the parameters result in more than one Time Sheet.
INCLUDE CLOSED TIME SHEETS	Closed Time Sheets are excluded unless this parameter is set to YES .
INCLUDE CANCELLED TIME SHEETS	Cancelled Time Sheets are excluded unless this parameter is set to YES .
SHOW TIME SHEET NOTES	Shows the Header Notes of the queried Time Sheets.
SHOW LINE NOTES	Shows the detailed Notes attached to each Time Sheet line.

Table 2-21. TMG - Time Sheet Details Report Parameters

SHOW ACTIVITY DETAILS	Shows the detailed time entered for the Time Sheet line by each activity.
SHOW CHARGE CODES	Shows the Charge Code Allocations for each Time Sheet line.

TMG - Time Sheet Summary Report

The TMG - Time Sheet Summary Report lets you summarize time information entered in non-cancelled Time Sheets. You can narrow the information you are looking for and interpret the results in many ways. For example, you can see the total time entered per Resource for time period, the total time per Project versus the budget for that Project, or the total time entered in each give time period. This report is similar to the Actual Time Summary report except that it shows Work Allocation budget information.

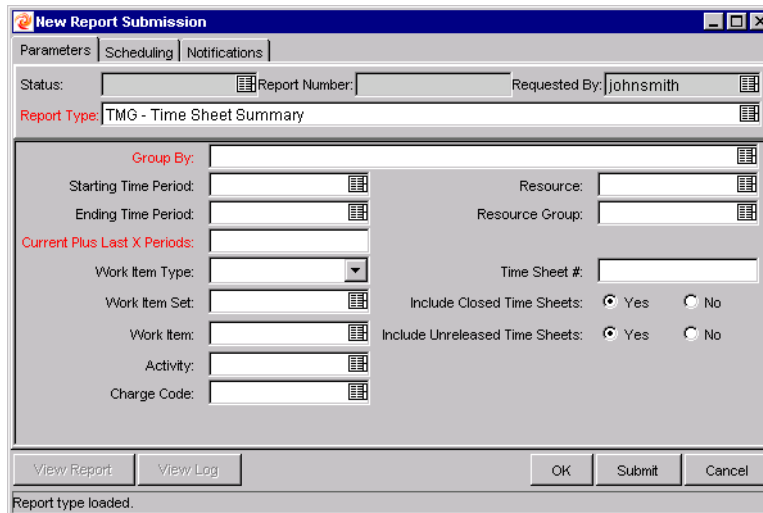


Figure 2-33 TMG - Time Sheet Summary Report Parameters

Table 2-22. TMG - Time Sheet Summary Report Parameters

Fields	Description
GROUP BY	Determines how to group the totals information. An example would be by Resource and then Time Period.

Table 2-22. TMG - Time Sheet Summary Report Parameters

STARTING TIME PERIOD	Only show time entered on Time Sheets on or after a specific time period.
ENDING TIME PERIOD	Only show time entered on Time Sheets on or before a specific time period.
CURRENT LAST X PERIODS	Only show Time Sheets in the current period and a given number of previous periods. If 0 is entered, the report only shows Time Sheets in the current time period.
WORK ITEM TYPE	Only show Time Sheet lines for a given Work Item Type.
WORK ITEM SET	Only show Time Sheet lines for a given set of Work Item sets (Request Types, Master Projects or Package Workflows).
WORK ITEM	Only show Time Sheet lines for a given set of Work Items (Package, Request, Project or Task).
ACTIVITY	Only use time entered against a specific activity.
CHARGE CODE	Only use time entered on lines charged to a specific Charge Code and use the Charge Code percentage to calculate the time against the Charge Code.
RESOURCE	Only show Time Sheets for a specific set of users.
RESOURCE GROUP	Only show Time Sheets for Resources in a set of Resource Groups.
TIME SHEET #	Only show Time Sheets of a specific number. A unique sequence number is assigned when there are multiple Time Sheets for a Resource in the same time period.
INCLUDE CLOSED TIME SHEETS	Closed Time Sheets are excluded unless this parameter is set to YES .
INCLUDE UNRELEASED TIME SHEETS	Active Time Sheets are excluded unless this parameter is set to YES .

TMG - Actual Time Summary Report

The TMG - Actual Time Summary Report lets you summarize actual time information entered in non-cancelled Time Sheets. You can narrow the information you are looking for and interpret the results many ways. For example, you can see the total time entered per Resource for each time period, the total time per Project, or the total time entered in each given time period.

This report is similar to the Time Sheet Summary Report except that it does not show Work Allocation budget information.

The screenshot shows a 'New Report Submission' dialog box with the following parameters:

- Status:** [Empty]
- Report Number:** [Empty]
- Requested By:** johnsmith
- Report Type:** TMG - Actual Time Summary
- Group By:** [Empty]
- Starting Time Period:** [Empty]
- Ending Time Period:** [Empty]
- Resource:** [Empty]
- Resource Group:** [Empty]
- Work Item Type:** [Dropdown menu]
- Work Item Set:** [Empty]
- Group Total Above X Hours:** [Empty]
- Work Item:** [Empty]
- Include Unreleased Time Sheets:** Yes No
- Activity:** [Empty]
- Charge Code:** [Empty]
- Show Sub Totals:** Yes No

Buttons at the bottom: View Report, View Log, OK, Submit, Cancel.

Report type loaded.

Figure 2-34 TMG - Actual Time Summary Report Parameters

Table 2-23. TMG - Actual Time Summary Report Parameters

Fields	Description
GROUP BY	Determines how to group the totals information. For example, grouping by Resource and then Time Period.
STARTING TIME PERIOD	Only show time entered on Time Sheets on or after a specific time period.
ENDING TIME PERIOD	Only show time entered on Time Sheets on or before a specific time period.
WORK ITEM TYPE	Only show Time Sheet lines for a given Work Item Type.
WORK ITEM SET	Only show Time Sheet lines for a given set of Work Item Sets (Request Types, Master Projects, or Package Workflows).
WORK ITEM	Only show Time Sheet lines for a given set of Work Items (Package, Request, Project or Task).
ACTIVITY	Only use time entered against a specific activity.
CHARGE CODE	Only use time entered on lines charged to a specific Charge Code and use the Charge Code percentage to calculate the time against the Charge Code.
RESOURCE	Only show Time Sheets for a specific set of users.

Table 2-23. TMG - Actual Time Summary Report Parameters

RESOURCE GROUP	Only show Time Sheets for Resources in a set of Resource Groups.
GROUP TOTAL ABOVE X HOURS	Only show the combinations where the total actual hours are above the given number. This lets you filter for the areas with large time charges.
INCLUDE UNRELEASED TIME SHEETS	Active Time Sheets are excluded unless this parameter is set to YES .
SHOW SUB TOTALS	If set to YES , the report shows time totals for the first column selected in the grouping.

TMG - Actual Time/Cost Summary Report

The TMG - Actual Time/Cost Summary Report is identical to the Actual Time Summary Report except that it also displays the calculated charge dollar totals for each grouping. This report is usually restricted to a smaller group of users than the Actual Time Summary Report.

Figure 2-35 TMG - Actual Time/Cost Summary Report Parameters

Table 2-24. TMG - Actual Time/Cost Summary Report Parameters

Fields	Description
GROUP BY	Determines how to group the totals information (for example, by Resource and then Time Period).

Table 2-24. TMG - Actual Time/Cost Summary Report Parameters

STARTING TIME PERIOD	Only show time entered on Time Sheets on or after a specific time period.
ENDING TIME PERIOD	Only show time entered on Time Sheets on or before a specific time period.
WORK ITEM TYPE	Only show Time Sheet lines for a given Work Item Type.
WORK ITEM SET	Only show Time Sheet lines for a given set of Work Item Sets (Request Types, Master Projects, Packages or Workflows).
WORK ITEM	Only show Time Sheet lines for a given set of Work Items (Package, Request, Project or Task).
ACTIVITY	Only use time entered against a specific activity.
CHARGE CODE	Only use time entered on lines charged to a specific Charge Code and use the Charge Code percentage to calculate the time against the Charge Code.
RESOURCE	Only show Time Sheets for a specific set of users.
RESOURCE GROUP	Only show Time Sheets for Resources in a set of Resource Groups.
GROUP TOTAL ABOVE X HOURS	Only show the combinations where the total Actual hours are above the given number. This lets you filter for the areas with large time charges.
GROUP TOTAL ABOVE X DOLLARS	Only show the combinations where the total Actual hours are above the given number. This lets you filter for the areas with large time charges.
INCLUDE UNRELEASED TIME SHEETS	Active Time Sheets are excluded unless this parameter is set to YES .
SHOW SUB TOTALS	If set to YES , the report shows time totals for the first column selected in the grouping.

TMG - Work Allocation Details Parameters

The TMG - Work Allocation Details Report shows much of the same information shown on the Work Allocation definition screen. This includes the Allocation Work Item information, the budget and Actuals to date, Charge Code Allocations, and Resource restrictions. The report also has hyperlinks allowing you to modify the allocation (if you have the “Edit Work Allocations” Access Grant).

Figure 2-36 TMG - Work Allocation Details Report Parameters

Table 2-25. TMG - Work Allocation Details Report Parameters

Fields	Description
WORK ITEM TYPE	Only show allocations for a given Work Item Type.
WORK ITEM SET	Only show allocations for a specific Work Item Set (such as a specific Request Type, Master Project or Package Workflow).
WORK ITEM	Only show the allocation for a specific Work Item.
CHARGE CODE	Only show allocations with a Charge Code Allocation against a specific Charge Code. This allows you to see all the allocations/budgets being charged to a specific department or cost center.
CREATION DATE FROM	Only show allocations created on or after a specific date.
CREATION DATE TO	Only show allocations created on or before a specific date.
ACTUALS/BUDGET OVER X%	Only show allocations where the Actuals to date are over a certain percentage of the current budget. This parameter lets you report on the allocations close to or over budget.
INCLUDE CLOSED	Closed allocations are excluded unless this parameter is set to YES .

Table 2-25. TMG - Work Allocation Details Report Parameters

SHOW RESOURCE RESTRICTIONS	For each allocation, show the Resources and Resource Groups to which the allocation is restricted.
SHOW DETAILED ACTUALS	Show the total Actuals to date for the Work Item, as well as the breakdown of the Actuals entered by each specific Resource.
SHOW DISCOUNTS	Show the standard and billing discount numbers.
SORT BY	Sort the report by the Work Item Type, Work Item Set, Work Item Name, the Original Budget or the Current Budget.

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