

KINTANA™
Time Management
User Guide

Version 5.0.0

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Chapter 1

Kintana Time Management Solution User's Guide

Introduction

This document is a guide for end users of the Kintana Time Management Solution for Kintana Release 5.0. This document describes the process of budgeting, entering and approving time using this solution. It describes the main Kintana screens for Time Management and goes through the detailed use of each of these screens. This User's Guide also details the reports and Dashboard components available for tracking time allocation and actual time information.

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

The 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 troublespots in your organization and make necessary corrections, such as when Projects are over their budgeted time allocation or have unplanned overtime for certain Requests.

The following sections provide an overview of Kintana's Time Management Solution and provide user instructions:

- *Key Terms*
- *Time Management Process Overview*
- *Entering and Updating Work Allocations*

- [Entering and Releasing Time Sheets](#)
- [Reviewing and Approving Time Sheets](#)
- [Time Management and the Kintana Dashboard](#)
- [Time Management Reports](#)

Key Terms

The following sections define the key terms used in the Kintana Time Management Solution:

- [Work Item](#)
- [Work Allocation](#)
- [Resource](#)
- [Time Sheet](#)
- [Activity](#)
- [Charge Code](#)
- [Period Types and Periods](#)
- [Delegations](#)
- [Override Rules](#)

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

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 1-1*.

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*IT ROI study for Applied			
Project	Analysis S	BL_Project	BL_Project > Analysis Stage			
Request						

Figure 1-1 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.



Note

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 1-2*.

Enter Time

Resource: John Smith Period: 06/16/03 - 06/30/03 Time Sheet #: 1
 Status: Active Description: Johnsmith - 06/16/03 - 06/30/03

[Dates](#) [Transaction History](#) [Approval Details](#) [Cancel Time Sheet](#)

Time Sheet Details

All Times are in Hours

Work Item Type	Work Item Set	Work Item Description	Current Budget To Date	Actuals	Details	Period Total	Mon 6/16	Tue 6/17	Wed 6/18	Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22
<input type="checkbox"/> Request						0							
<input type="checkbox"/> Request						0							
<input type="checkbox"/> Request						0							
Totals:							0	0	0	0	0	0	0

[Remove Lines](#) [Reset to Saved](#) New Lines: [Add](#)

[Save](#) [Release](#) [Cancel](#)

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

[Clear Filters](#)

Figure 1-2 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 1-3* shows a sample Charge Code where 100% of the Work Allocation is charged to the Finance Department.

Work Allocation Charge Code Information

Work Item Type: Package
 Work Item Set: Kintana Migrator Workflow
 Work Item: 30015
 Description:
 Can User Update Charge Codes?
 Are Charge Codes Required?

Add New Charge Codes

Charge Code:

Charge Codes

<input checked="" type="checkbox"/>	Charge Code Name	Description	Charge Percent
<input checked="" type="checkbox"/>	Department = Finance	Finance	100
Total			100

Figure 1-3 Sample Charge Code

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 of month
- 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 1-4](#) shows an example of a Time Sheet using a Semi-Monthly Time Period.

Period: 6/16/02 - 6/30/02

Period	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Total	6/16	6/17	6/18	6/19	6/20	6/21	6/22
Details (hrs)	(hrs)	(hrs)	(hrs)	(hrs)	(hrs)	(hrs)	(hrs)
	20.0	0.0	4.0	4.0	4.0	4.0	

Figure 1-4 Semi-Monthly Time Period

Delegations

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



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 proper Access Grants).

Override Rules

When tracking costs, you can use default cost rates associated with Resources and Activities. 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 be used to override Approver information.

Time Management Process Overview

The Kintana Time Management process consists of the following steps:

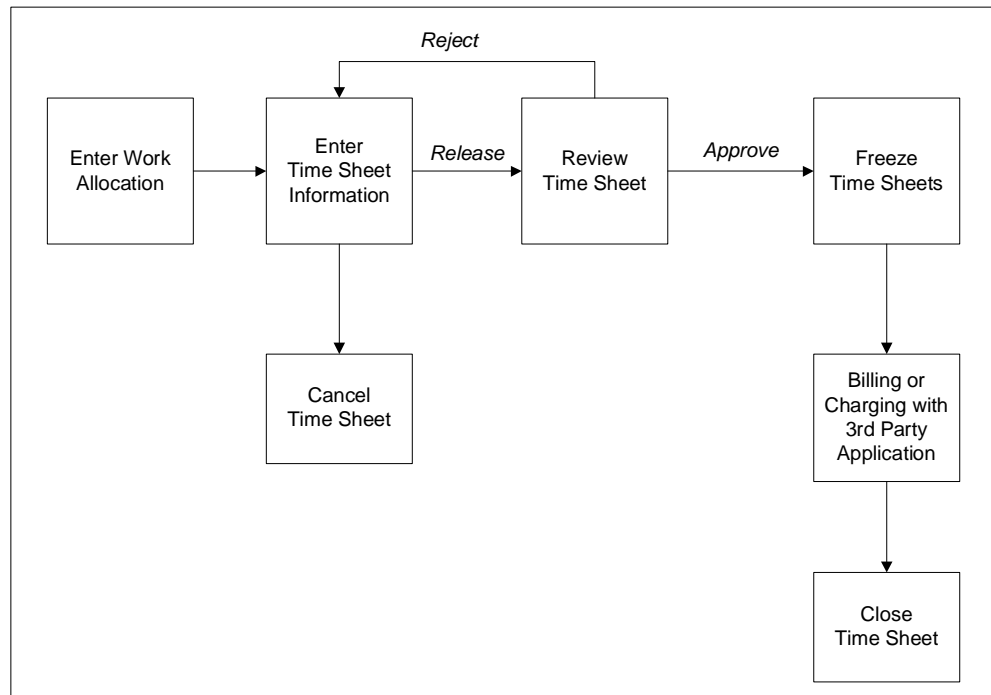


Figure 1-5 Time Management Process Overview

1. **Entering and Updating Work Allocations** - Managers or Planners enter the budgeted time that can be spent for specific Work Items. They also specify information such as which Resources can be allocated to the specific Item as well as 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. See [“Entering and Updating Work Allocations”](#) on page 11 for more information.

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. See [“Entering and Releasing Time Sheets”](#) on page 25 for more information.
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. See [“Reviewing and Approving Time Sheets”](#) on page 36 for more information.

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. See [“Freezing and Closing Time Sheets”](#) on page 39 for more information.
5. **Billing or Charging with 3rd Party Application** - After the Time Sheet is frozen, 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.
6. **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. See [“Freezing and Closing Time Sheets”](#) on page 39 for more information.
7. **Cancelling Time Sheets** – Only “Active” Time Sheets can be cancelled. Once a Time Sheet has been cancelled, it cannot be reopened or updated. See [“Cancelling Time Sheets”](#) on page 36 for more information.

Time Management Menu Group

The Time Management process steps are performed using the **TIME** menu group in the Kintana interface.

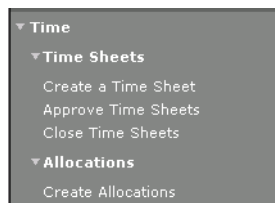


Figure 1-6 Time Management Menu Group

If you have a license for the Time Management Solution, the **TIME** menu group appears on the navigation bar automatically.

Time Management Dashboard Page

To display the TIME MANAGEMENT Dashboard page on your Dashboard:

1. Logon to your Kintana Dashboard.

Front Page

Dashboard - Front Page [Personalize This Page](#)

My Tasks [? Edit](#) [+](#) [x](#)

Filtered by: Tasks starting within 20 days; Tasks finishing within 14 days

! Cost Analysis [Development Laptop Upgrade > Initial Assessment > Cost Analysis](#)

Task State: Sched Start: 5/9/03 Sched Finish: 5/9/03

*% Complete:

! Purchase New Laptops [Development Laptop Upgrade > Purchase New Laptops](#)

Task State: Pending Predecessor Sched Start: 5/12/03 Sched Finish: 5/16/03

*% Complete: 0

! Recommendation Made [Sales Server Upgrade > Compose Future Plan > Recommendation Made](#)

Task State: Pending Predecessor Sched Start: 5/20/03 Sched Finish: 5/20/03

*% Complete: 0

[Save](#) [Reset](#)

Showing 1 to 3 of 8 : [Maximize](#)

Resource Pool List [? Edit](#) [+](#) [x](#)

Filtered by: Organization Unit: IT Special Ops Unit D.

Resource Pool	Resource Pool is for	Status	Active	Start	Finish
IT Unit D	Org Unit: IT Special Ops Un...	New	Yes	06/03	08/03

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

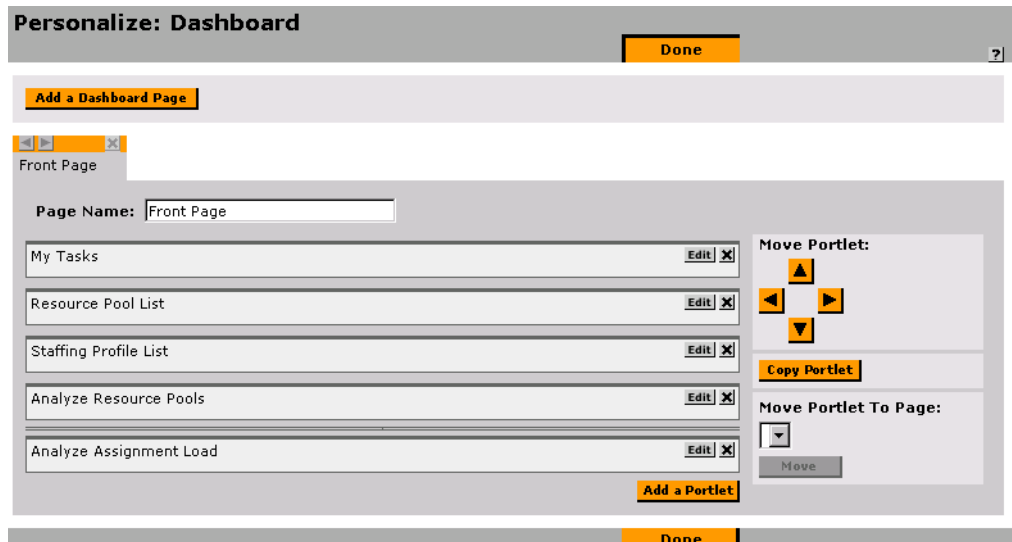
Staffing Profile List [? Edit](#) [+](#) [x](#)

Filtered by: Active: Yes.

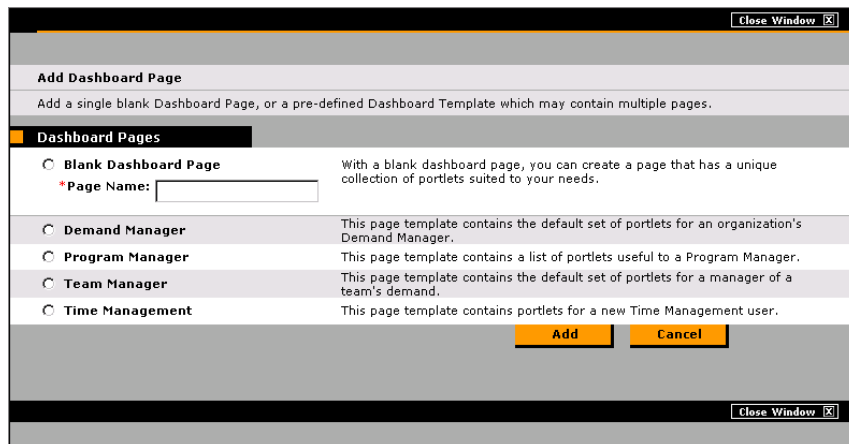
Staffing Profile	Staffing Profile is for	Workload Category	Status	Active	Start	Finish	Total Hours	Actual Hours
Unit D - Fal...	Org Unit: IT Spe...	Operational ...	New	Yes	08/03	11/03	4790	0

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

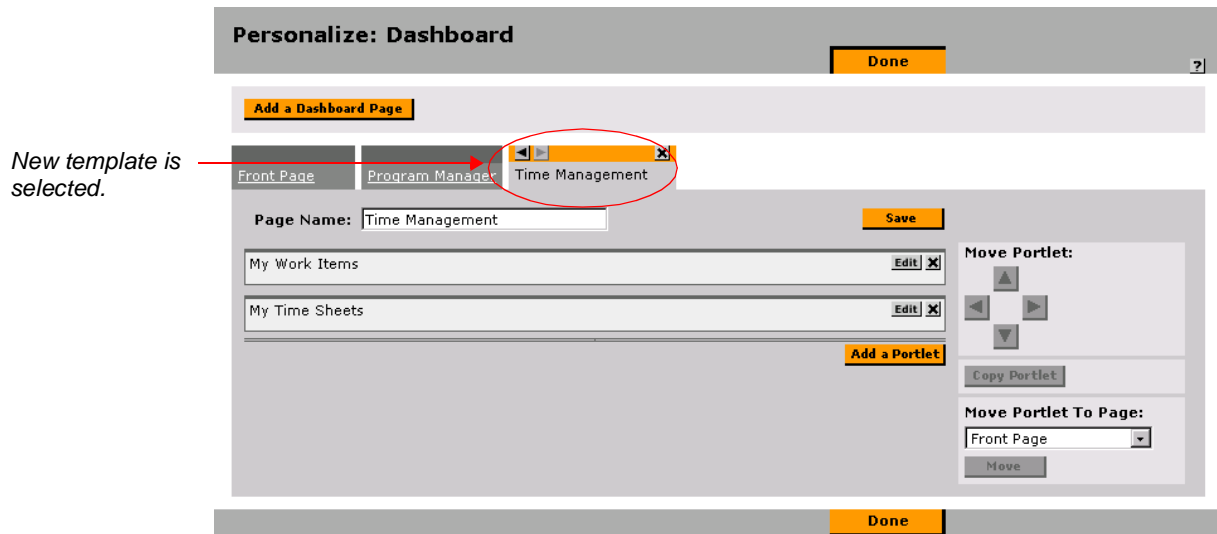
2. Click **PERSONALIZE THIS PAGE**. The PERSONALIZE: DASHBOARD page opens.



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

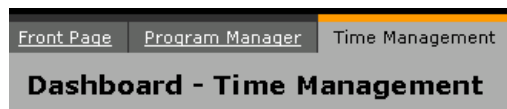


4. Select the **TIME MANAGEMENT** template and click **ADD**. The **PERSONALIZE: DASHBOARD** page reloads with a new Dashboard page appearing to the right of the other pages.



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.



Entering and Updating Work Allocations

An individual Manager or Planner can enter budgeted time for specific Work Items in the Create Allocations page. Each row in the Work Allocation Details section is a unique Work Allocation. You can only have one Work Allocation for a given Work Item.

Create Work Allocations

Work Allocation Details

Work Item Type	Work Item	Work Item Set	Description	Original Bdgt (Hrs)	Current Bdgt (Hrs)	Standard Discount %	Billing Discount %
Request							
Request							
Request							
Request							
Request							

New Allocations:

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

Figure 1-7 Sample Create Allocations Page

The following sections provide additional details and instructions for setting Work Allocations:

- [Creating New Work Allocations](#)
- [Updating Existing Work Allocations](#)
- [Deleting Existing Work Allocations](#)
- [Closing Existing Work Allocations](#)
- [Using Filters in the Create Allocations Page](#)
- [Searching for Existing Work Allocations](#)

Creating New Work Allocations

To enter a new Work Allocation:

1. Log onto the Kintana interface.
2. Select **CREATE -> ALLOCATIONS** or **TIME -> ALLOCATIONS -> CREATE ALLOCATIONS** from the navigation bar. The CREATE WORK ALLOCATIONS page opens.

Create Work Allocations

Work Allocation Details

Work Item Type	Work Item	Work Item Set	Description	Original Bdgt (Hrs)	Current Bdgt (Hrs)	Standard Discount %	Billing Discount %
Request							
Request							
Request							
Request							
Request							

New Allocations: **Add**

Work Item Filters Create Cancel

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:

Clear Filters

- Navigate to a blank row at the top of the WORK ALLOCATION DETAILS section. Five blank rows will always exist in the WORK ALLOCATION DETAILS section. If blank rows exist in insufficient quantity, enter the number of blank lines you want to add in the NEW ALLOCATIONS field and click **ADD**. This adds the specified number of new rows to the section.
- Select a WORK ITEM TYPE from the drop down list. The available Work Item Types are **REQUEST**, **PACKAGE**, **TASK**, **PROJECT**, and **MISC**.

This narrows down the available list of Work Items. You can use the WORK ITEM FILTERS section to further narrow the list. This is useful if you do not know the exact Work Item for which you are creating a Work Allocation. The following sections describe setting Filters.

- o [“General Filters”](#) on page 22
- o [“Request Filters”](#) on page 23
- o [“Package Filters”](#) on page 23
- o [“Project Filters”](#) on page 23

- Select a specific Work Item from the WORK ITEM auto-complete list. The set of Work Items that displays in the auto-complete window depends on your selection in the WORK ITEM TYPE drop down list, as shown below:
 - o **REQUEST** - A list of open Requests in Kintana Create, identified by the Request Numbers.

- o **PACKAGE** - A list of open Packages in Kintana Deliver, identified by the Package Numbers.
 - o **TASK** - A list of Project Tasks in Kintana Drive, identified by the Task Names.
 - o **PROJECT** - A list of open Master Projects or Subprojects in Kintana Drive, identified by the Project Names.
 - o **MISC** - A list of miscellaneous Work Items set by your company.
6. The following information-only columns are automatically updated based on your selection in the WORK ITEM auto-complete list.
- **WORK ITEM SET** - displays the Work Item Set of the Work Item you selected.
 - o For Request Work Items, this column shows the specific Request Type.
 - o For Package Work Items, this column shows the Workflow used by the Package.
 - o For Project and Task Work Items, this column shows the Master Project.
 - **DESCRIPTION** - displays the value in the Description field for the given Work Item, truncated to 50 characters.
7. Enter the original budget in the ORIGINAL BDGT (HRS) field. When entering a new allocation, enter the budgeted time in hours in this field. You can enter values up to one-tenth of an hour.

The CURRENT BDGT (HRS) field defaults based on the value provided in the ORIGINAL BDGT (HRS) field. During the life cycle of this allocation, make any changes to the budgeted time needed for the Work Item in the CURRENT BDGT (HRS) field. Changes to the ORIGINAL BDGT (HRS) field, which gives you visibility to changes in budget from initiation, are restricted because it's an important metric when examining planning and estimation accuracy.


The ACTUALS TO DATE (HRS) column is automatically updated. If work has already been performed and time entered against the specific Work Item, this non-editable field displays the total amount entered across all Resources and all time periods for non-cancelled Time Sheets.

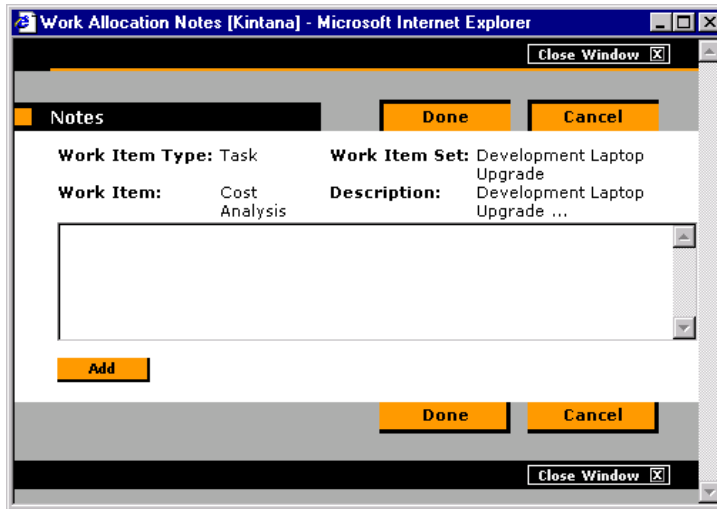
8. Enter the STANDARD DISCOUNT %.

If you are using the Kintana Time Management Solution to gather information used to charge back for work performed for certain Work Items, you might have negotiated a different cost rate than the standard rates for your Resources. In this case, you can enter the pre-negotiated discount percentage. Kintana will use this discount when calculating total costs from actual time worked and Resource cost rates. Note that normally, this field will either be 0% (to indicate use of standard cost rates or that billing is not being performed) or 100% (to indicate no charge for this Work Item).


9. Enter the BILLING DISCOUNT %.

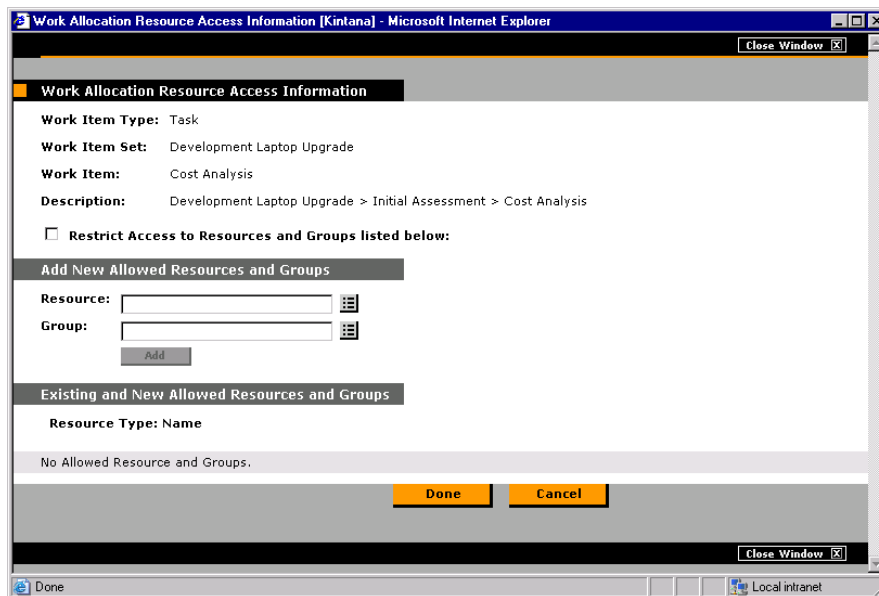
Sometimes after work is performed, you might need to re-negotiate charges because of overruns. For example, if the costs of a given Project went over by 20%, you might only charge for an additional 10%. This field allows you to indicate a post-work, pre-billing discount for all work performed for the Work Item. When calculating the total costs for a Work Item, Kintana will apply both the STANDARD DISCOUNT % as well as the BILLING DISCOUNT % (for example, if both fields had a value of 10%, the end discount would be 19% ($100\% - 100\% * 90\% * 90\%$)).

10. Click **CREATE**. The CREATED WORK ALLOCATIONS page opens, displaying the Allocations you have created.
11. Enter any additional Details. You can enter detailed information regarding the new Work Allocation by clicking the various available icons.
 - o  (Notes) - Clicking this icon opens the WORK ALLOCATION NOTES page and lets you add free form notes to the allocation.




Enter Notes information in the text area. Click **ADD** for each new Note. Click **DONE** to close the WORK ALLOCATION NOTES page.

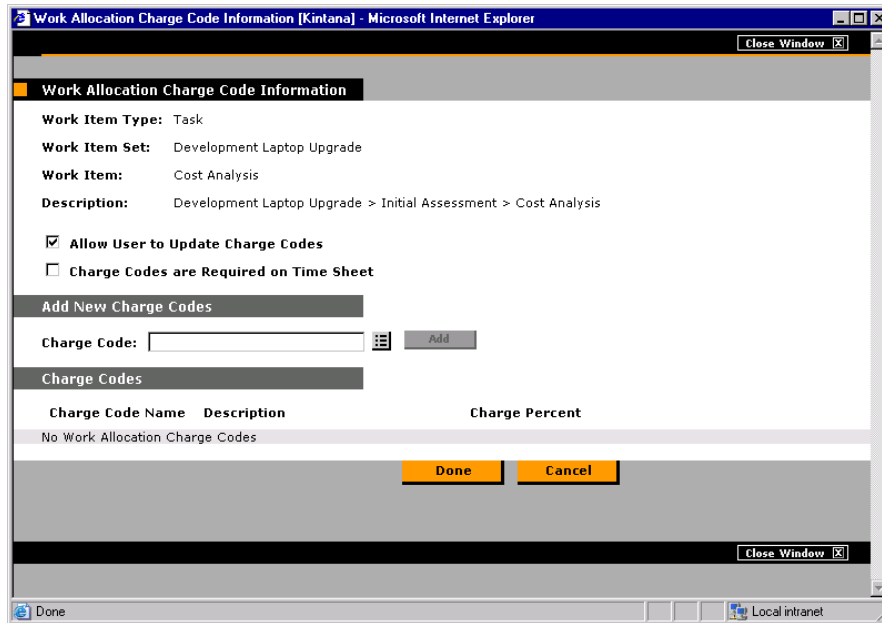
- o  (Resource Access)- Rather than allowing any user to put actual time against the specific Work Item, you can limit the budgeted time to a specific set of Resources.



To add to the list of Resources for the given Work Allocation, select the individual Resource or Resource Group from the appropriate auto-complete list in the ADD NEW ALLOWED RESOURCES AND GROUPS section and click **ADD**. This adds the Resource/Resource Group to the list in the

EXISTING AND NEW ALLOWED RESOURCES AND GROUPS section. Click **DONE** to save the selection and close the window.

- o  (Charge Codes) - Click this icon to specify the Charge Codes to use when charging back work done on this Work Item as well as the percentage breakdown to use to distribute the total calculated cost to the various Charge Codes.



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:

Charge Codes

Charge Code Name	Description	Charge Percent
No Work Allocation Charge Codes		

To add to the list of Charge Codes for the given Work Allocation, select the code from the CHARGE CODE auto-complete list and click **ADD**. This adds the Charge Code to the list in the CHARGE CODES section. Within this section, specify the percentage allocations for each code. You can specify percentages to a tenth of a percent but the values must total 100%. Click **OK** to save the selection and close the window.



When selecting a value for the Work Item field from a list of values in the Create Allocations page, it is important to filter the list to a manageable number. To do this, enter values in the Work Item Filters section. The Work Item Filters fields will limit the list to any fields in the section with values entered for them. The various kinds of filters are listed below:

- o *“General Filters”* on page 22
- o *“Request Filters”* on page 23
- o *“Package Filters”* on page 23
- o *“Project Filters”* on page 23

12. Click **DONE**.

Updating Existing Work Allocations

To update Work Allocations:

1. Log onto the Kintana interface.
2. Select **SEARCH -> ALLOCATIONS** from the navigation bar. The **SEARCH WORK ALLOCATIONS** page opens.

Search Work Allocations

Search Information

Search

Cancel

Work Item Type:

Work Item Set:

Work Item:

Restricted To:

Charge Code:

Creation Date From: To:

Actual/Budget Over: %

Include Closed? Yes No

Clear Fields

Result Display Options

Sort By: Ascending Descending

*Maximum Lines Displayed:

Search

Cancel

- Enter any necessary criteria to search for the desired Work Allocation and click **SEARCH**. Any Work Allocations that match the criteria display on the WORK ALLOCATION SEARCH RESULTS page.

Work Allocation Search Results

Work Allocation Details

Work Item Type	Work Item	Work Item Set	Description	Original Bdgt (Hrs)	Current Bdgt (Hrs)	Actuals To date (hrs)	Standard Discount %	Billing Discount %	Delete	Close	Details
<input type="checkbox"/>	Task	Cost...	Devel...	Developme...		0.0			<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Task	Image...	Devel...	Developme...		0.0			<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Task	Discu...	Sales...	Sales Ser...		0.0			<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Task	Vet P...	Sales...	Sales Ser...		0.0			<input type="checkbox"/>	<input type="checkbox"/>	

Export Data to Excel

- Click **CHECK ALL** and **EDIT**. This reloads the screen with all allocations in Update mode.

Edit Work Allocations

Work Allocation Details

Work Item Type	Work Item	Work Item Set	Description	Original Bdgt (Hrs)	Current Bdgt (Hrs)	Actuals To date (hrs)	Standard Discount %	Billing Discount %	Details
Task	Cost Analy	Development Laptop Upgrade	Development ...			0.0			
Task	Image Old	Development Laptop Upgrade	Development ...			0.0			
Task	Discuss Fir	Sales Server Upgrade	Sales Server...			0.0			
Task	Vet Possib	Sales Server Upgrade	Sales Server...			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

Export Data to Excel

- Make any necessary updates to the information.
- Click **DONE** to save the changes.

Deleting Existing Work Allocations

To delete existing Work Allocations:

1. Log onto the Kintana interface.
2. Select **SEARCH -> ALLOCATIONS** from the navigation bar. The **SEARCH WORK ALLOCATIONS** page opens.
3. Enter any necessary criteria to search for the desired Work Allocation and click **SEARCH**. Any Work Allocations that match the criteria display on the **WORK ALLOCATION SEARCH RESULTS** page.

Work Allocation Search Results												
Work Allocation Details												
	Work Item Type	Work Item	Work Item Set	Description	Original Bdgt (Hrs)	Current Bdgt (Hrs)	Actuals To date (hrs)	Standard Discount %	Billing Discount %	Delete	Close	Details
<input type="checkbox"/>	Task	Cost...	Devel...	Developme...			0.0			<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Task	Image...	Devel...	Developme...			0.0			<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Task	Discu...	Sales...	Sales Ser...			0.0			<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Task	Vet P...	Sales...	Sales Ser...			0.0			<input type="checkbox"/>	<input type="checkbox"/>	

4. Select the checkbox under the **DELETE** column (at the far right end of the row) for the appropriate Work Allocation.

Delete

5. Click **DELETE**. The Work Allocation is deleted.



Note

Work allocations that have time logged against them can not be deleted. Also, users can only delete work allocations that they created (unless they have the **TIME MGMT: MANAGE WORK ALLOCATIONS Access Grant**).

Closing Existing Work Allocations

To close existing Work Allocations:

1. Log onto the Kintana interface.

2. Select **SEARCH -> ALLOCATIONS** from the navigation bar. The **SEARCH WORK ALLOCATIONS** page opens.
3. Enter any necessary criteria to search for the desired Work Allocation and click **SEARCH**. Any Work Allocations that match the criteria display on the **WORK ALLOCATION SEARCH RESULTS** page.

Work Allocation Search Results											
Work Allocation Details											
Work Item Type	Work Item	Work Item Set	Description	Original Bdgt (Hrs)	Current Bdgt (Hrs)	Actuals To date (hrs)	Standard Discount %	Billing Discount %	Delete	Close	Details
<input type="checkbox"/>	Task	Cost...	Devel...	Developme...		0.0			<input type="checkbox"/>	<input type="checkbox"/>	D A S
<input type="checkbox"/>	Task	Image...	Devel...	Developme...		0.0			<input type="checkbox"/>	<input type="checkbox"/>	D A S
<input type="checkbox"/>	Task	Discu...	Sales...	Sales Ser...		0.0			<input type="checkbox"/>	<input type="checkbox"/>	D A S
<input type="checkbox"/>	Task	Vet.P...	Sales...	Sales Ser...		0.0			<input type="checkbox"/>	<input type="checkbox"/>	D A S

Export Data to Excel

4. Select the checkbox under the **CLOSE** column (at the far right end of the row) for the appropriate Work Allocation.

Close

5. Click **CLOSE**. After the Work Allocation is closed, the Work Item can no longer be entered on a new Time Sheet.



Note

Users can only close a work allocation if they:

- Created the work allocation, or
- Have the TIME MGMT: MANAGE WORK ALLOCATIONS Access Grant

Using Filters in the Create Allocations Page

When selecting a value for the Work Item field from a list of values in the Create Allocations page, it is important to filter the list to a manageable number. To do this, enter values in the Work Item Filters section. The Work Item Filters fields will limit the list to any fields in the section with values entered for them. The various kinds of filters are listed below:

- *General Filters*

- [Request Filters](#)
- [Package Filters](#)
- [Project Filters](#)



Note

The Work Item Filters are configurable. The Filters described below may be different for your installation.

Create Work Allocations

Work Allocation Details

Work Item Type	Work Item	Work Item Set	Description	Original Bdgt (Hrs)	Current Bdgt (Hrs)	Standard Discount %	Billing Discount %
Request							
Request							
Request							
Request							
Request							

New Allocations:

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 1-8 Create Allocations Page with Filter Information

General Filters

- **MODIFIED IN LAST X DAYS** - Limit the list of Work Items to those that have been modified in the specified number of days.
- **CREATED IN LAST X DAYS** - Limit the list of Work Items to those that have been created in the specified number of days.
- **INCLUDE CLOSED?** - Determines whether to include closed Work Items in the list of returned Work Items.

Request Filters

- REQUEST TYPE - Limit the list of Requests to those with a specified set of Request Types.
- REQUEST ASSIGNED TO - Limit the list of Requests to those assigned to a specified set of Users.
- REQUEST ASSIGNED GROUP - Limit the list of Requests to those with the Assigned Group field value in a specified set of Security Groups.

Package Filters

- PACKAGE WORKFLOWS - Limit the list of Packages to those with a specified set of Workflows.
- PACKAGE ASSIGNED GROUP - Limit the list of Packages to those with the Assigned Group field value in a specified set of Security Groups.
- PACKAGE ASSIGNED TO - Limit the list of Packages to those assigned to a specified set of Users.

Project Filters

- MASTER PROJECT - Limit the list of Tasks or Subprojects to a specified set of Master Projects.
- PROJECT ASSIGNED RESOURCE - Limit the list of Tasks to those with an Assigned Resource in a specified list of Users.
- MASTER PROJECTS ONLY? - Determines whether or not to query Subprojects.
- PROJECT MANAGER - Limit the list of Tasks to those with a Project Manager identified in a specific list of Project Managers. Limit the list of Projects/Subprojects with a Project Manager in the specified list of Project Managers.

Searching for Existing Work Allocations

In addition to entering new Work Allocations, you can search for existing Work Allocations.

To locate existing Work Allocations:

1. Log onto the Kintana interface.
2. Select **SEARCH -> ALLOCATIONS** from the navigation bar. The **SEARCH WORK ALLOCATIONS** page opens.

Search Work Allocations

Search Information
Search
Cancel

Work Item Type:

Work Item Set:

Work Item:

Restricted To:

Charge Code:

Creation Date From: To:

Actual/Budget Over: %

Include Closed? Yes No

Clear Fields

Result Display Options

Sort By: Ascending Descending

*Maximum Lines Displayed:

Search
Cancel

Figure 1-9 Search Allocations Page

3. Enter criteria in the search fields for Work Allocations using the parameters listed in [Table 1-1](#).

Table 1-1. Search Allocations Page Parameters

Parameter	Description
WORK ITEM TYPE	Limit Work Allocations to allocations for a single type of Work Item (Requests, Packages, Projects, or Tasks).
WORK ITEM SET	Limit Allocations for a specific Request Type, a specific Master Project, or a specific Package Workflow.
WORK ITEM	Limit Allocations to a specific Work Item. This will at most return a single Work Allocation.
RESTRICTED TO	Limit Allocations to those that have been restricted to a specific Resource.
CHARGE CODE	Limit Allocations to those that have been linked to a specific Charge Code.
CREATION DATE FROM/TO	Limit Allocations created within a specific date range.
ACTUAL/BUDGET OVER	Limit Allocations to those where the Actual Hours divided by the Current Budgeted Hours is greater than a specified percentage.
INCLUDE CLOSED	Include Closed Allocations as well as Open Allocations.

- Enter any necessary criteria to search for the desired Work Allocation and click **SEARCH**. Any Work Allocations that match the criteria display on the WORK ALLOCATION SEARCH RESULTS page.

Work Allocation Search Results												
Work Allocation Details												
	Work Item Type	Work Item	Work Item Set	Description	Original Bdgt (Hrs)	Current Bdgt (Hrs)	Actuals To date (hrs)	Standard Discount %	Billing Discount %	Delete	Close	Details
<input type="checkbox"/>	Task	Cost...	Devel...	Developme...			0.0			<input type="checkbox"/>	<input type="checkbox"/>	D A S
<input type="checkbox"/>	Task	Image...	Devel...	Developme...			0.0			<input type="checkbox"/>	<input type="checkbox"/>	D A S
<input type="checkbox"/>	Task	Discu...	Sales...	Sales Ser...			0.0			<input type="checkbox"/>	<input type="checkbox"/>	D A S
<input type="checkbox"/>	Task	Vet P...	Sales...	Sales Ser...			0.0			<input type="checkbox"/>	<input type="checkbox"/>	D A S

Export Data to Excel

- Click the hyperlinked Work Item to open the appropriate Kintana entity.

Entering and Releasing Time Sheets

Individuals can create or update their Time Sheets in the Enter Time page. Select **CREATE -> TIME SHEET** or **TIME -> TIME SHEETS -> CREATE A TIME SHEET** from the navigation bar in the Kintana interface to access this page. Each line in the Time Sheet Details section identifies work against a single Work Item for the given time period. The Work Item may or may not be tied to a Work Allocation.

The following sections provide instructions:

- [Creating a New Time Sheet](#)
- [Searching for Existing Time Sheets](#)
- [Deleting Existing Time Sheet Lines](#)
- [Using Filters in the Enter Time Page](#)
- [Releasing Time Sheets](#)
- [Cancelling Time Sheets](#)

Enter Time

Resource: **John Smith** Period: **06/16/03 - 06/30/03** Time Sheet #: **1**
 Status: **Active** Description: johnsmith - 06/16/03 - 06/30/03

Notes Transaction History Approval Details

Time Sheet Details

All Times are in Hours

Work Item Type	Work Item Description	Work Item Set Description	Current Budget To Date	Actuals To Date	Details	Period Total	Mon 6/16	Tue 6/17	Wed 6/18	Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22
<input type="checkbox"/> Request			0			0							
<input type="checkbox"/> Request			0			0							
<input type="checkbox"/> Request			0			0							
Totals:							0	0	0	0	0	0	0

 New Lines:

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

Figure 1-10 Sample Enter Time Page

Creating a New Time Sheet

To create a new Time Sheet:

1. Log onto the Kintana interface.
2. Select **CREATE -> TIME SHEET** or **TIME -> TIME SHEETS -> CREATE A TIME SHEET** from the navigation bar. The Create Time Sheet page opens.

Create Time Sheet

*Time Period:

*Resource:

*Description:

3. Enter the the specific TIME PERIOD, the RESOURCE (usually yourself unless you have delegation authority to create other users' Time Sheets), and the Time Sheet DESCRIPTION.



Note

The TIME PERIOD may vary depending on your individual Time Management setting.

4. Click **CREATE**. The ENTER TIME page opens.

Enter Time

Resource: **John Smith** Period: **06/16/03 - 06/30/03** Time Sheet #: **1**
 Status: **Active** Description:

Time Sheet Details

All Times are in Hours

Work Item Type	Work Item Description	Work Item Set	Current Budget	Actuals To Date	Details	Period Total	Mon 6/16	Tue 6/17	Wed 6/18	Thu 6/19	Fri 6/20	Sat 6/21	Sun 6/22	
<input type="checkbox"/> Request	<input type="text"/>	<input type="text"/>			<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>	0								
<input type="checkbox"/> Request	<input type="text"/>	<input type="text"/>			<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>	0								
<input type="checkbox"/> Request	<input type="text"/>	<input type="text"/>			<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>	0								
<input type="button" value="Remove Lines"/> <input type="button" value="Reset to Saved"/> New Lines: <input type="text" value="0"/> <input type="button" value="Add"/> Totals: <table style="display: inline-table; border: none;"> <tr> <td style="text-align: right;">0</td><td style="text-align: right;">0</td><td style="text-align: right;">0</td><td style="text-align: right;">0</td><td style="text-align: right;">0</td><td style="text-align: right;">0</td><td style="text-align: right;">0</td><td style="text-align: right;">0</td> </tr> </table>							0	0	0	0	0	0	0	0
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

5. Navigate to a blank row at the top of the TIME SHEET DETAILS section. To add additional blank rows, enter the number of blank lines you want to add in the NEW LINES field and click **ADD**. This adds the specified number of new rows to the TIME SHEET DETAILS section.

- o **REQUEST** - A list of open Requests in Kintana Create, identified by the Request Numbers.
- o **PACKAGE** - A list of open Packages in Kintana Deliver, identified by the Package Numbers.
- o **TASK** - A list of Project Tasks in Kintana Drive, identified by the Task Names.
- o **PROJECT** - A list of open Master Projects or Subprojects in Kintana Drive, identified by the Project Names.

- o **Misc** - A list of miscellaneous Work Items set by your company.

This narrows down the available list of Work Items. You can use the WORK ITEM FILTERS section to further narrow the list. This is useful if you do not know the exact Work Item for which you are creating a Time Sheet line.

6. Select a Work Item by clicking on the Work Item column's auto-complete list. The following information-only columns are automatically updated.

- WORK ITEM SET - displays the context of the Work Item you have identified.
 - o For Request Work Items, this column shows the specific Request Type
 - o For Package Work Items, this column shows the Workflow used by the Package
 - o For Project and Task Work Items, this column shows the Master Project
- WORK ITEM DESCRIPTION - displays the value in the DESCRIPTION field for the given Work Item, truncated to 50 characters. Holding the cursor over the text displays the full Description.
- CURRENT BUDGET - displays the current total budgeted hours for all Resources for this Work Item as specified on the Work Allocation for this item, if the Work Allocation exists.
- ACTUALS TO DATE - If work has already been performed and time entered against the specific Work Item, this non-updateable field will display the total amount entered across all Resources and all time periods on non-cancelled Time Sheets.

7. Enter your time worked.

 Note

The values entered into the time sheet may be different depending on your Resource settings. Kintana's Time Management Solution can be configured to accept time values in:


- hours per day
- hours per period
- percent per period

In this example, the time is specified in hours per day. For the given period, the ENTER TIME page has a column for every day. For each day, you can enter the time worked in hours, to the tenth of an hour. You can navigate to different days in the period using the navigation arrows at the top of the period section. If a field is blank in this section, it is assumed to be 0. You can also enter negative numbers in this section.



Contact your Kintana Administrator for more information on Resource Time Sheet settings.

The PERIOD TOTAL field is calculated. This shows the total for all the daily entries for the Time Sheet line.

1. Enter any additional Details. You can enter detailed information regarding the new Time Sheet line by clicking the various available icons.

- o  (Activity Details) - Rather than entering time information at the totals for specific days, for each Time Sheet line, you can break down the daily time worked into pre-defined activities. This can be useful for activity reporting and future estimation of work.

To enter activity detailed time information in this screen, enter the appropriate time worked for each activity for each day. You can navigate to different days using the navigation arrows at the top of the screen. If you enter values in the daily fields in the main Enter Time form, any existing activity detail information will be erased for the specific day for the specific line.

- o  (Note) - You can enter free form notes for the specific Time Sheet.
- o  (Charge Code) - Add additional Charge Codes to the Time Sheet.

2. In the WORK ITEM FILTERS section, you can limit the values for the Work Items by entering information in the GENERAL FILTERS, REQUEST FILTERS, PACKAGE FILTERS and PROJECT FILTERS fields. See [“Using Filters in the Enter](#)

Time Page” on page 34 for more detailed information about limiting values for Work Items.

3. Click **SAVE**.

A new Time Sheet has been created.

Viewing/Updating the Time Sheet Header Information

After creating a Time Sheet, you can view and update various details of the Time Sheet using the buttons at the top of the Enter Time page.



Figure 1-11 Time Sheet Page Detail Buttons

- **NOTES** - You can enter free form notes for the specific Time Sheet.

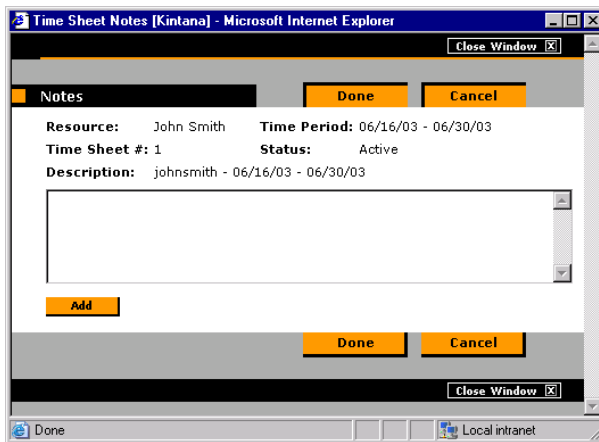


Figure 1-12 Time Sheet Notes Page

- **TRANSACTION HISTORY** - This page shows the status history of the Time Sheet: when it was released, approved or rejected, frozen, and closed. For each status change, it also shows the user who performed the action.

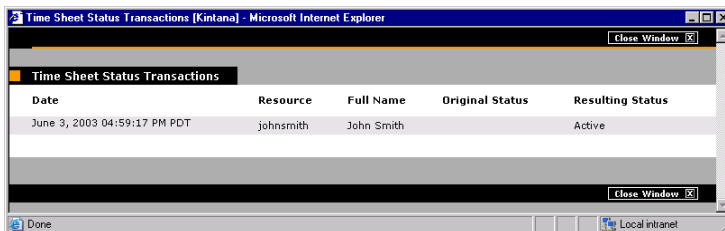


Figure 1-13 Time Sheet Transaction History Page

- **APPROVAL DETAILS** - You can view the approver or approval group for the specific Time Sheet. This value controls who can approve the Time Sheet once it has been released.

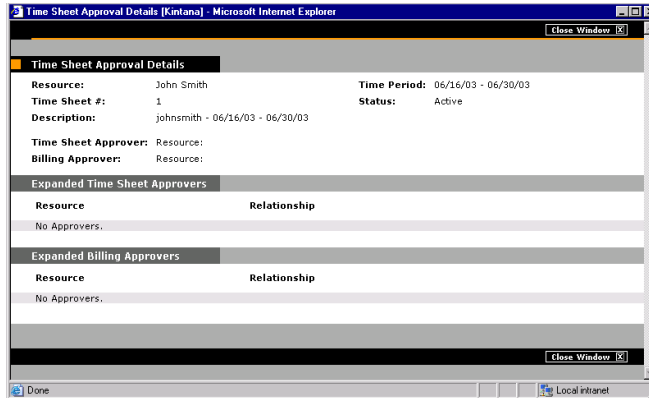


Figure 1-14 Time Sheet Approval Details Page

Searching for Existing Time Sheets

In addition to creating new Time Sheets, you can view and update existing Time Sheets.

To locate and open an existing Time Sheet:

1. Log onto the Kintana interface.
2. Select **SEARCH -> TIME SHEETS** from the navigation bar. The SEARCH TIME SHEETS page opens.

Search Time Sheets

Search Information

Search
Cancel

Period Type:

Time Period:

Resource:

Status:

Description:

Include Frozen and Closed? Yes No

Clear Fields

Result Display Options

Sort By: Ascending Descending

*Maximum Lines Displayed:

Search

Cancel

3. Enter search criteria in the SEARCH INFORMATION section. You can search using any of the criteria described in [Table 1-2](#):

Table 1-2. Search Time Sheets Parameters

Parameter	Description
PERIOD TYPE	Limit Time Sheets to those of a specific period type.
TIME PERIOD	Limit Time Sheets to those of a specific time period.
RESOURCE	Limit Time Sheets for a specific user.
STATUS	Limit Time Sheets to those of a specific status (Active, Released, or Rejected).
DESCRIPTION	Limit to Time Sheets that contain a specific text string in its description.
INCLUDE FROZEN AND CLOSED?	Include Frozen/Closed Time Sheets as well as active Time Sheets.

4. Click **SEARCH**. The results are displayed on the TIME SHEET SEARCH RESULTS page.

Time Sheet Search Results Showing 1 Results

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

Showing 1 Results

Export Data to Excel

5. Click the hyperlinked TIME SHEET # and TIME PERIOD to open the Time Sheet.

Enter Time

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

[Notes](#) [Transaction History](#) [Approval Details](#) [Cancel Time Sheet](#)

Time Sheet Details

All Times are in Hours

Work Item Type	Work Item Description	Work Item Set	Current Budget To Date	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"/> Task	Asses...	Sales ...	Sales Se...	0.0	0.0								
<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

Updating Existing Time Sheet Lines

To update an existing Time Sheet line:

1. Locate and open the Time Sheet. See *“Searching for Existing Time Sheets”* on page 31 for instructions.

Enter Time

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

[Notes](#) [Transaction History](#) [Approval Details](#) [Cancel Time Sheet](#)

Time Sheet Details

All Times are in Hours

Work Item Type	Work Item Description	Work Item Set	Current Budget To Date	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"/> Task	Asses...	Sales ...	Sales Se...	0.0	0.0								
<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

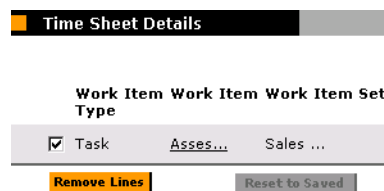
Master Project: Project Assigned Resource: Master Projects Only? Yes No

2. Update any desired fields.
3. Click **SAVE**.

Deleting Existing Time Sheet Lines

To delete existing Time Sheet lines:

1. Locate and open the Time Sheet. See [“Searching for Existing Time Sheets”](#) on page 31 for instructions.
2. Select the check box next to the WORK ITEM TYPE (as shown in the figure below) that corresponds to the Time Sheet line you want to delete



3. Click **REMOVE LINES**. The Time Sheet line is deleted.

Using Filters in the Enter Time Page

When selecting a value for the WORK ITEM field from a list of values, it is important to filter the list to a manageable number. To do this, enter values in the WORK ITEM FILTERS section to limit the values displayed. The WORK ITEM field limits the list to any fields in the section with values entered for them. The various kinds of filters are listed below:

- [General Filters](#)
- [Request Filters](#)
- [Package Filters](#)
- [Project Filters](#)



Note

The Work Item Filters are configurable. The Filters described below may be different for your installation.

General Filters

- MODIFIED IN LAST X DAYS - Limit the list of Work Items to those that have been modified in the specified number of days.
- CREATED IN LAST X DAYS - Limit the list of Work Items to those that have been created in the specified number of days.
- INCLUDE CLOSED? - Determines whether to include closed Work Items in the list of returned Work Items.

Request Filters

- REQUEST TYPE - Limit the list of Requests to those with a specified set of Request Types.
- REQUEST ASSIGNED TO - Limit the list of Requests to those assigned to a specified set of Users.
- REQUEST ASSIGNED GROUP - Limit the list of Requests to those with the Assigned Group field value in a specified set of Security Groups.

Package Filters

- PACKAGE WORKFLOWS - Limit the list of Packages to those with a specified set of Workflows.
- PACKAGE ASSIGNED GROUP - Limit the list of Packages to those with the Assigned Group field value in a specified set of Security Groups.
- PACKAGE ASSIGNED TO - Limit the list of Packages to Packages assigned to a specified set of Users.

Project Filters

- MASTER PROJECT - Limit the list of Tasks or Subprojects to a specified set of Master Projects.
- PROJECT ASSIGNED RESOURCE - Limit the list of Tasks to those with an Assigned Resource in a specified list of Users.
- MASTER PROJECTS ONLY? - Determines whether or not to query Subprojects.
- PROJECT MANAGER - Limit the list of Tasks to those with a Project Manager identified in a specific list of Project Managers. Limit the list of Projects/Subprojects with a Project Manager in the specified list of Project Managers.

Releasing Time Sheets

Once you are finished entering Time Sheet information, you can release it to the review and approval cycle by clicking the **SUBMIT** button. This action saves any changes and sets the Time Sheet to a status of **RELEASED**. You can still update the Time Sheet when it is in the **RELEASED** state. If new changes are made, it will revert back to the Active state upon save and will need to be re-released.

Cancelling Time Sheets

Only **ACTIVE** Time Sheets can be cancelled or released. Cancelled Time Sheets are moved to **CANCELLED** status and cannot be reopened or updated.

Reviewing and Approving Time Sheets

Managers and Auditors can review Released Time Sheets and either Approve or Reject them in the Approve Time page. Each row in the Time Sheet Approval Details section is a unique Time Sheet ready for approval. Note that there can be multiple Time Sheets per Resource for a given time period. To approve Time Sheets, Managers perform the following actions:

- *Searching for Existing Time Sheets to Review/Approve*
- *Reviewing Time Sheets*
- *Approving or Rejecting Time Sheets*

Searching for Existing Time Sheets to Review/Approve

To review and eventually approve Time Sheets, you first need to search for Time Sheets ready for approval.

To locate Time Sheets that are ready for approval:

1. Log onto the Kintana interface.
2. Select **TIME -> TIME SHEETS -> APPROVE TIME SHEETS** from the navigation bar. The Approve Time page opens.

Approve Time

Search Information Search Cancel

*Period Type:

*Time Period:

Resource:

Manager:

Resource Group:

Time Sheet Status:

Include Frozen and Closed? Yes No Clear Fields

Result Display Options

Sort By: Ascending Descending

*Maximum Lines Displayed:

Search Cancel

- Enter search criteria in the SEARCH INFORMATION section. You can search using any of the criteria described in [Table 1-3](#):

Table 1-3. Approve Time Parameters

Parameter	Description
PERIOD TYPE	Limit Time Sheets to those of a specific period type.
TIME PERIOD	Limit Time Sheets to those of a specific time period.
RESOURCE	Limit Time Sheets for a specific user.
MANAGER	Limit Time Sheets to those of a user with a specific manager.
RESOURCE GROUP	Limit Time Sheets to those of a particular Security Group with Time Management enabled.
TIME SHEET STATUS	Limit Time Sheets to those of a specific status (ACTIVE , RELEASED , APPROVED , FROZEN , CLOSED , CANCELLED , or REJECTED).
INCLUDE FROZEN AND CLOSED?	Include Frozen/Closed Time Sheets as well as active Time Sheets.

- Click **SEARCH**. The TIME SHEET APPROVAL DETAILS page opens.

Time Sheet Approval Details Showing 1 Results

All Times are in Hours

Resource	Time Sheet #	Manager	Status	Total Charge (\$)	Period Totals	Sun 6/1	Mon 6/2	Tue 6/3	Wed 6/4	Thu 6/5	Fri 6/6	Sat 6/7	Notes
<input type="checkbox"/>	John Smith	1 - johnsmith - 06/01/03 - 06/1...	Released	400	20	5.0	7.0	8.0					<input type="text"/>
Totals:				400	20	5	7	8	0	0	0	0	

The TIME SHEET APPROVAL DETAILS page cannot be used to search for Time Sheets where the user does not have the authority to approve the specific Time Sheet.

Reviewing Time Sheets

Once you have located and opened the appropriate Time Sheets, review their details and then either approve or reject the Time Sheets. You can review the following details.

- RESOURCE - The Resource/User assigned to the Time Sheet.
- TIME SHEET # - This sequence number for the Time Sheet. This will usually be '1' unless there are multiple Time Sheets for the specific Resource for the same time period. You can select the hyperlink here to get a view-only picture of the Time Sheet details.
- MANAGER - The Manager for the Resource as defined in the system.
- STATUS - The current status of the Time Sheet, usually **RELEASED** or **REJECTED**. Any Time Sheets in the **OPEN** state will not be shown.
- TOTAL CHARGE (\$) - A field which adds up all time entered on the Time Sheet multiplied by the adjusted hourly rates (based on source rates, defined discounts, and any override rate rules).
- PERIOD TOTALS - The total hours entered on the Time Sheet.
- (DAILY INFORMATION) - The total hours entered for every day in the given time period. You can navigate to different days in the period using the scroll bar at the bottom of the section.
- NOTES - You can view detailed information regarding the Time Sheet and the individual lines on the Time Sheet. Only Time Sheet Notes are shown here, as opposed to Notes for Work Allocations.

Approving or Rejecting Time Sheets

Once you have reviewed a Time Sheet, you can either approve it or reject it. This is performed in the TIME SHEET APPROVAL DETAILS page.

Time Sheet Approval Details														
Showing 1 Results														
Resource	Time Sheet #	Manager	Status	Total Charge (\$)	Period Totals	All Times are in Hours							Notes	
						Sun 6/1	Mon 6/2	Tue 6/3	Wed 6/4	Thu 6/5	Fri 6/6	Sat 6/7		
<input type="checkbox"/>	John Smith	1 - johnsmith - 06/01/03 - 06/1...	Released	400	20	5.0	7.0	8.0						
Totals:				400	20	5	7	8	0	0	0	0		

To approve a Time Sheet:

1. Locate, open and review the Time Sheet. See [“Searching for Existing Time Sheets to Freeze/Close”](#) on page 40 for details.
2. Check the box to the left of the Resource.
3. Click **APPROVE**.

To reject a Time Sheet:

1. Locate, open and review the Time Sheet. See [“Searching for Existing Time Sheets to Freeze/Close”](#) on page 40 for details.
2. Check the box to the left of the Resource.
3. Click **REJECT**.

When a Time Sheet is rejected, it is automatically routed back to the Resource for review and re-submission.

Freezing and Closing Time Sheets

After a Time Sheet is approved, it can still be updated by the original Resource and then go through a re-approval cycle. This situation can happen if the Resource submitted the Time Sheet prematurely and needs to add additional time to it. At some point, the Time Sheet needs to be frozen so no more changes can be made to it. This is required so that the information can be processed for billing and other similar actions.

Using the Close Time Sheets page, Managers and auditors can review approved Time Sheets and freeze them. Once any external actions are performed (such as billing and other charge backs) the Time Sheet can be closed. Each row in the Time Sheet Closure Details page is a unique Time

Sheet ready for freezing or closure. There can be multiple Time Sheets per Resource for a given time period.

The following sections provide instructions for:

- [Searching for Existing Time Sheets to Freeze/Close](#)
- [Reviewing Time Sheets to Freeze/Close](#)
- [Freezing and Closing Time Sheets](#)

Searching for Existing Time Sheets to Freeze/Close

To review and eventually approve Time Sheets, you first need to search for Time Sheets ready for freezing or closure.

To locate Time Sheets ready for freezing or closure:

1. Log onto the Kintana interface.
2. Select **TIME -> TIME SHEETS -> CLOSE TIME SHEETS** from the navigation bar. The CLOSE TIME SHEETS page opens.

3. Enter search criteria in the SEARCH INFORMATION section. You can search based on any of the following criteria described in [Table 1-4](#):

Table 1-4. Close Time Sheets Parameters

Parameter	Description
PERIOD TYPE	Limit Time Sheets to those of a specific period type.

Table 1-4. Close Time Sheets Parameters

Parameter	Description
TIME PERIOD	Limit Time Sheets to those of a specific time period.
RESOURCE	Limit Time Sheets for a specific user.
MANAGER	Limit Time Sheets to those of a user with a specific manager.
RESOURCE GROUP	Limit Time Sheets to those of a particular Security Group with Time Management enabled.
TIME SHEET STATUS	Limit Time Sheets to those of a specific status (ACTIVE , RELEASED , APPROVED , FROZEN , CLOSED , CANCELLED , or REJECTED).
INCLUDE CLOSED?	Include Closed Time Sheets as well as active Time Sheets.

4. Click **SEARCH**. The TIME SHEETS CLOSURE DETAILS page opens.

Time Sheet Closure Details										Showing 1 Results							
										All Times are in Hours							
Resource	Time Sheet #	Manager	Status	Total Charge (\$)	Period Totals	Sun 6/1	Mon 6/2	Tue 6/3	Wed 6/4	Thu 6/5	Fri 6/6	Sat 6/7	Notes				
<input type="checkbox"/>	John Smith	1 - johnsmith - 06/01/03 - 06/1...	Approved	400	20	5.0	7.0	8.0									
Totals:				400	20	5	7	8	0	0	0	0					
<input type="button" value="Check All"/> <input type="button" value="Clear All"/> <input type="button" value="Freeze"/> <input type="button" value="Close"/>										<input type="button" value="Done"/>							

This search will only locate Time Sheets where the user has the authority to freeze or close the specific Time Sheet.

Reviewing Time Sheets to Freeze/Close

Once you have located the appropriate Time Sheets, review their details and then either freeze or close them. You can review the following details.

- **RESOURCE** - The Resource/User assigned to the Time Sheet.
- **TIME SHEET #** - This sequence number for the Time Sheet. This will usually be '1' unless there are multiple Time Sheets for the specific Resource for the same time period. You can select the hyperlink here to get a view-only picture of the Time Sheet details.
- **MANAGER** - The Manager for the Resource as defined in the system.
- **STATUS** - The current status of the Time Sheet, usually **RELEASED** or **REJECTED**. Any Time Sheets in the **OPEN** state will not be shown.

- **TOTAL CHARGE (\$)** - A field which adds up all time entered on the Time Sheet multiplied by the adjusted hourly rates (based on source rates, defined discounts, and any override rate rules).
- **PERIOD TOTALS** - The total hours entered on the Time Sheet.
- **(DAILY INFORMATION)** - The total hours entered for every day in the given time period. You can navigate to different days in the period using the scroll bar at the bottom of the section.
- **NOTES** - You can view detailed information regarding the Time Sheet and the individual lines on the Time Sheet.

Freezing and Closing Time Sheets

Once you have reviewed a Time Sheet in the TIME SHEET CLOSURE DETAILS page, you can either freeze it or close it.

Time Sheet Closure Details										Showing 1 Results						
										All Times are in Hours						
Resource	Time Sheet #	Manager	Status	Total Charge (\$)	Period Totals	Sun 6/1	Mon 6/2	Tue 6/3	Wed 6/4	Thu 6/5	Fri 6/6	Sat 6/7	Notes			
<input type="checkbox"/>	John Smith	1 - johnsmith - 06/01/03 - 06/1...	Approved	400	20	5.0	7.0	8.0								
Totals:				400	20	5	7	8	0	0	0	0				

To freeze a Time Sheet:

1. Check the box to the left of the Resource.
2. Click **FREEZE**.

To close a Time Sheet:

1. Check the box to the left of the Resource.
2. Click **CLOSE**.

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 1-5* lists and describes the available Time Management portlets. Detailed descriptions of each portlet are provided in the sections following the table.

Table 1-5. 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.
My Work Items	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.
TMG - Resource Group Total by Work Item	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.
TMG - Resource Group Totals	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.
TMG - Resource Totals	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.

Table 1-5. Kintana Time Management Portlets

Kintana Time Management Portlet	Description
TMG - Total Hrs by Work Item	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).
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	

Showing 1 to 3 of 3 : Maximize

Figure 1-15 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

Showing 1 to 2 of 2 : Maximize

Figure 1-16 My Time Sheets portlet

My Work Items Portlet

The My Work Items portlet is similar to the My Requests and My Packages portlets and 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:

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

Showing 1 to 1 of 1 : Maximize

Figure 1-17 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
- 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

Showing 1 to 5 of 5 : Maximize

Figure 1-18 TMG - Resource Group Total by Work Item Portlet Parameters

Table 1-6. TMG - Resource Group Total by Work Item Portlet Parameters

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.
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.

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

Figure 1-19 TMG - Resource Group Totals Portlet Parameters

Table 1-7. TMG - Resource Group Totals Portlet Parameters

Parameter	Description
Resource Groups	Limit the results to a set of Resource Groups.

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
- 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 1-20 TMG - Resource Totals Portlet Parameters

Table 1-8. 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.

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
- 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

Showing 1 to 5 of 13 : Maximize

Figure 1-21 TMG - Total Hours By Work Item Portlet Parameters

Table 1-9. 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.
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.

Table 1-9. TMG - Total Hours By Work Item Portlet Parameters

Actuals to Date Over (Hrs)	Only show with Actuals to Date over a specific number of hours.
----------------------------	---

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	

Showing 1 to 4 of 4 : Maximize

Figure 1-22 TMG - Work Allocation Details Portlet Parameters

Table 1-10. TMG - Work Allocation Details Portlet Parameters

Parameters	Description
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Table 1-10. TMG - Work Allocation Details Portlet Parameters

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.
Actual/Budget Over	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. Note: When this parameter is used, Allocations with 0 Current Budget are ignored.
Budget Over (Hrs)	Only show Allocations with Current Budgets over a specific number of hours. Use this parameter to see just the larger items.

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
- 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 1-23 TMG - Work Item Set Budgets and Actuals Portlet Parameters

Table 1-11. 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.

Table 1-11. TMG - Work Item Set Budgets and Actuals Portlet Parameters

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.

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 listed below, this section lists and describes the screen parameters.

- [*TMG - Time Sheet Details Report*](#)
- [*TMG - Time Sheet Summary Report*](#)
- [*TMG - Actual Time Summary Report*](#)
- [*TMG - Actual Time/Cost Summary Report*](#)
- [*TMG - Work Allocation Details Report*](#)

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

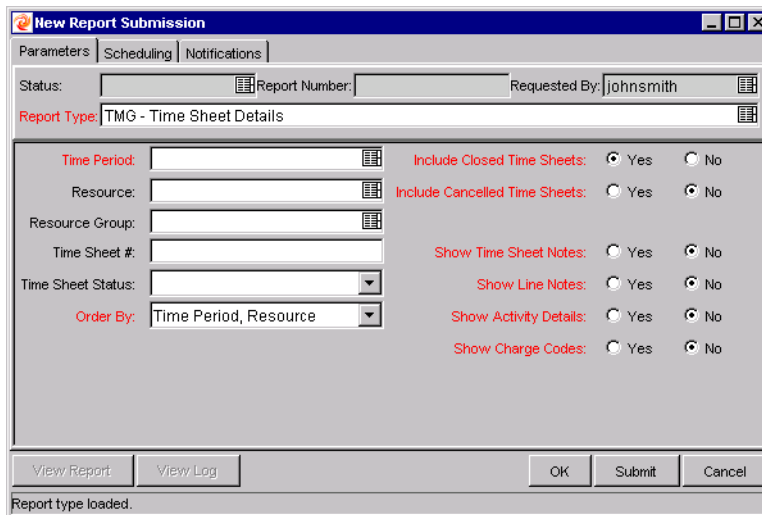


Figure 1-24 TMG - Time Sheet Details Report Parameters

Table 1-12. 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.

Table 1-12. TMG - Time Sheet Details Report Parameters

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.
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 given time period. This report is similar to the Actual Time Summary report except that it shows Work Allocation budget information.

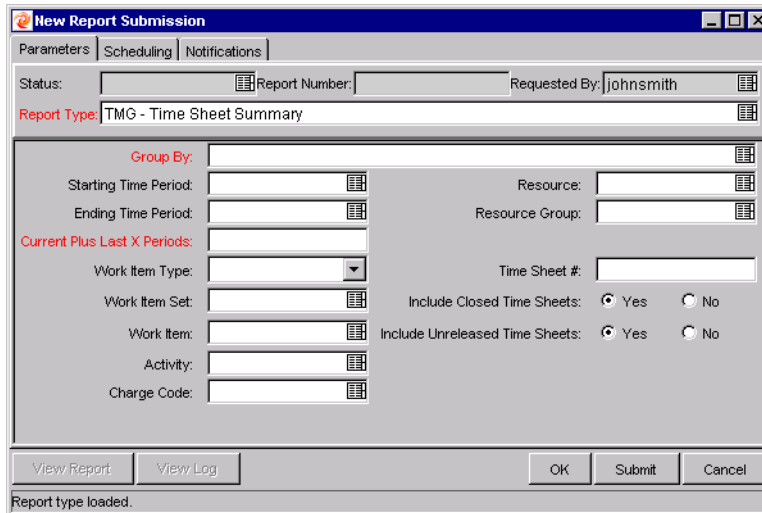


Figure 1-25 TMG - Time Sheet Summary Report Parameters

Table 1-13. 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.
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.

Table 1-13. TMG - Time Sheet Summary Report Parameters

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.

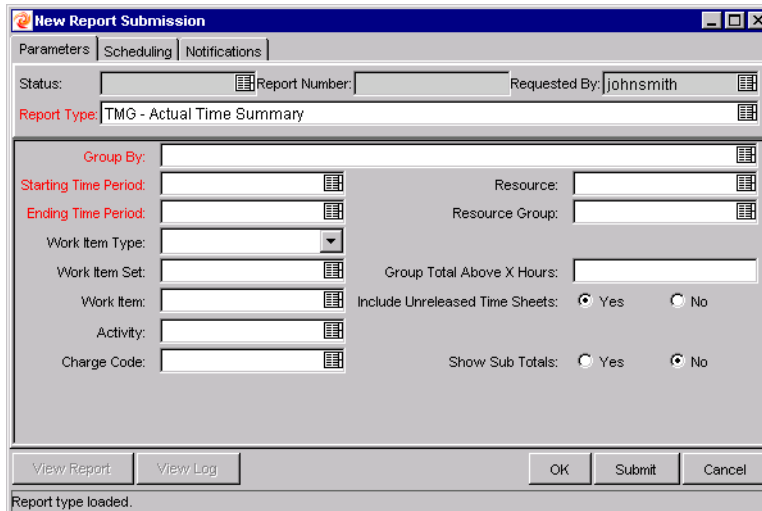


Figure 1-26 TMG - Actual Time Summary Report Parameters

Table 1-14. 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.
RESOURCE GROUP	Only show Time Sheets for Resources in a set of Resource Groups.

Table 1-14. TMG - Actual Time Summary Report Parameters

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.

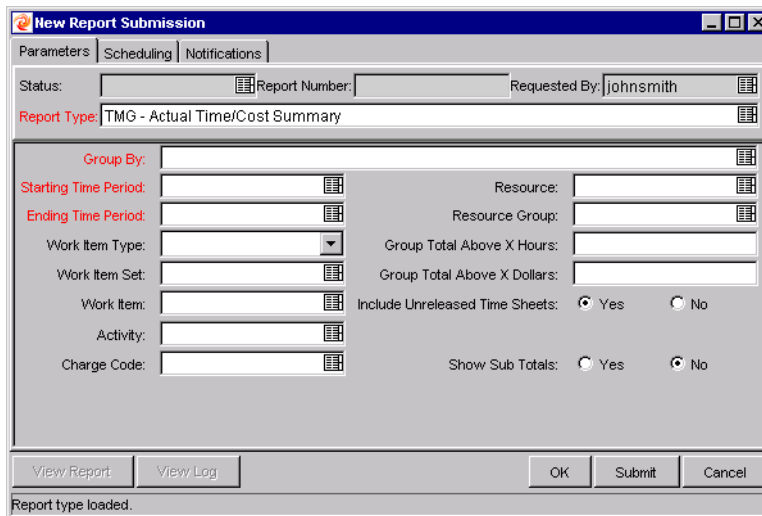


Figure 1-27 TMG - Actual Time/Cost Summary Report Parameters

Table 1-15. 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).
STARTING TIME PERIOD	Only show time entered on Time Sheets on or after a specific time period.

Table 1-15. TMG - Actual Time/Cost Summary Report Parameters

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 Report

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 proper Access Grant).

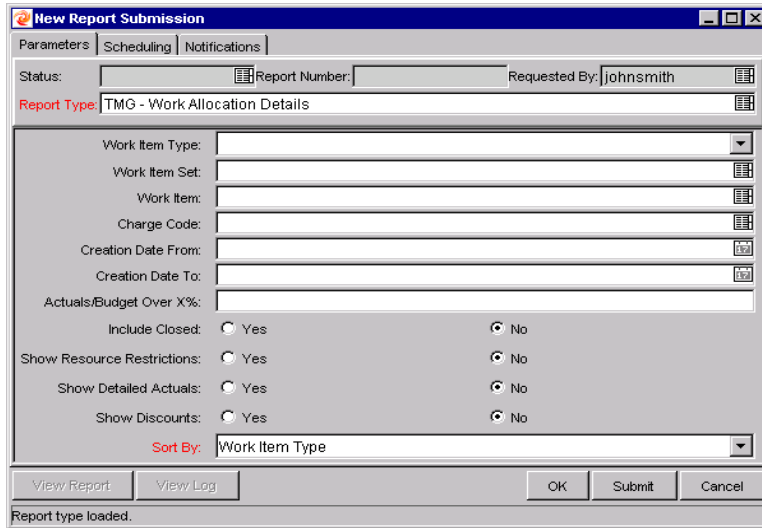


Figure 1-28 TMG - Work Allocation Details Report Parameters

Table 1-16. 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 1-16. 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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