



Assignment Modelling
Feature Guide
Winter 20



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Assignment Modelling (Winter 20)

This guide was last updated for the Winter 20 release.

Introduction

In the Winter 20 release, Kimble has introduced the ability to model multiple Assignments during Proposal development. Previously, when forecasting work for a Proposal, you had to create each Assignment individually - for example creating 10 identical Assignments for 10 developers, each at 100% utilisation.

The Assignment Modelling enhancements enable you to:

- Create a model Assignment that can generate multiple draft child Assignments. For example, a single model Assignment would represent 10 developers each at 100% utilisation. When ready, you would generate the 10 individual Assignments.
- Edit the draft Assignments to create any necessary individual differences. For example, if 2 of the developers were not needed for the first two weeks of the project, you would amend accordingly.
- Create more detailed models and edit the draft Assignments using the new Manual Profiling feature.
- Activate the draft Assignments to create Open Demand.

Essential Concepts

Manual Profiling

Manual Profiling enables you to edit the Usage view of the Assignment Search and Activity Assignment pages. Using Manual Profiling, you can control your Assignment Usage Forecast by entering the exact number of hours or days that you want an Assignment to take per day, week, or month. When using Manual Profiling, you are defining the Usage and the Start and End dates, therefore features like Usage Preservation, Reforecasting, and Rebalancing are disabled.

Model Assignment

A Model Assignment is a way of representing and drafting multiple identical Assignments when creating a Proposal. From the Model Assignment, you generate draft child Assignments that you can then activate to create Open Demand.

Draft Assignments

When you apply a Model Assignment, it generates Draft Assignments on a Proposal. You can edit these individually or change the model and reapply the changes to all Draft Assignments. When you are ready to start filling demand, you can activate the Draft Assignments to create Open Demand.

Model Assignment Life-cycle

A Model Assignment progresses through the following stages:

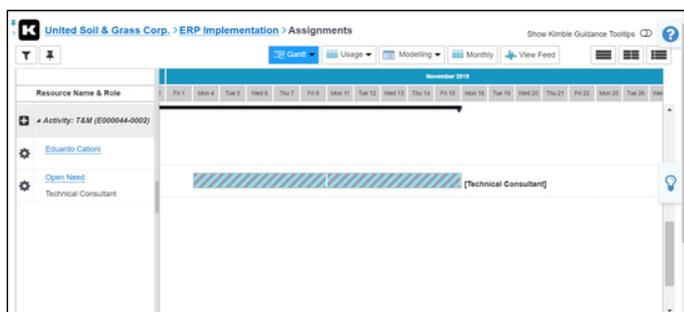
1. Model Assignment
The model represents multiple other Assignments. You can edit this model and any Assignments that you create from it inherit the properties.
2. Draft Assignment
The child Assignments of a model are created in draft form. You can edit each Draft Assignment individually if the actual Demand needs are different from the Model Assignment. While the Assignments are in the draft stage, you can delete them and regenerate new Draft Assignments for the model. This means that if any major changes occur that affect all Draft Assignments, it could be easier to revert them all, edit the Model Assignment, and then regenerate them from it.
3. Activated Assignments
When you are ready to begin fulfilling Demand for the Assignments, you can activate them. After activation, you can no longer revert the Assignments, and the Model Assignment disappears. The Assignments now become Open Demand.

Modelling Assignments

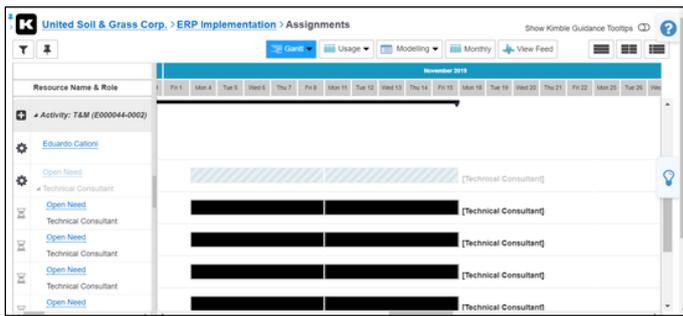
Model Assignments enable you to create a single Assignment model for multiple Generic Resources. From the model Assignment, you create draft Assignments for each Generic Resource and can edit them to further tailor the Assignments to the Proposal. You can also profile a Model Assignment to reflect different start and end dates of the child Assignments. When the Draft Assignments are ready, you can activate them so that the demand can be filled.

You can clone a model Assignment at any stage and it will only clone the model. It will not generate children, even if the model you are cloning has children generated.

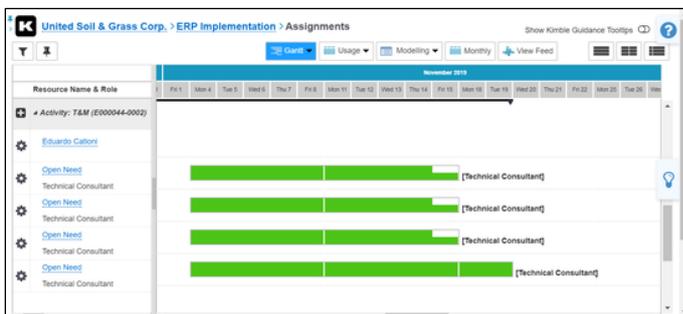
A Model Assignment for four Open Need generic Assignments:



The Model Assignment with draft child Assignments generated:



The child Assignments edited and activated.



Enabling Assignment Modelling

Before using the Assignment Modelling function, you must enable it for the Resource Type and the Resourced Activity that are to be used.

Use Resource Types to define when Model Assignments can be used. Typically, you would only define Generic Resources that are fulfilled multiple times on a project as allowing Model Assignments.

You can enable Assignment Modelling on Resourced Activities when creating new ones or retrospectively by editing an existing one.

On the Resource Type

To enable Assignment modelling on a Resource Type:

1. Navigate to the **Resource Types** tab.
2. Click the name of the Resource Type to display the Resource Type page.

3. In the top right-hand corner of the Resource Type card, click the burger menu and select **Edit Resource Type** to display the Resource Type page.

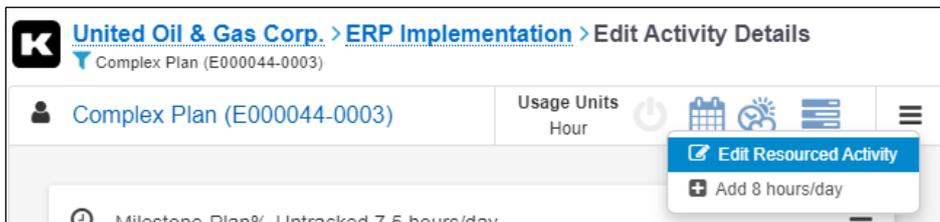


4. Check the **Can Model Assignments** checkbox.
5. Click **Save**.

On the Resourced Activity

To enable Assignment modelling on a Resourced Activity:

1. Navigate to the Delivery Engagement that contains the Activity.
2. In the menu on the left-hand side, point to **Activity > Edit Activity Details** and select the required Activity.
3. In the top right-hand corner of the Activity card, click the burger menu and select **Edit Resourced Activity** to display the Edit Resourced Activity window.



4. In the Usage Forecasting and Tracking section, select the **Allow Model Assignments** checkbox.
5. Click **Save**.

Creating Model Assignments

Proposal Scope screen

To create a model Assignment from the Proposal Modeller:

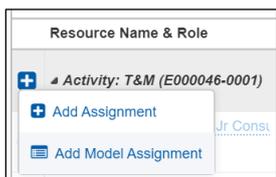
1. Navigate to the Proposal Scope screen for the Proposal containing the element for which you want to model Assignments.
2. Click the burger menu in the required Element card and select **Configure Element** to display the Edit Delivery Element window.
3. In the Assignments tab, select the required **Usage Forecast Mode**.
4. In the Resource table, point to **Add Assignment** and select **Add Model Assignment**.
5. Select the **Resource** from the Resource Lookup.
A new column, Num of Assignments, is added to the table.

6. In the **Num of Assignments** field, enter the number of Assignments the model represents.
For example, if you are modelling a demand for five Resources, enter 5.
7. Complete the rest of the Assignment details.
8. Click **Save** or **Save and Close**.
9. If required, update the Assignment's Capability Profile.
All Draft Assignments are created with the same Capability Profile.

Activity Assignments screen

To create a model Assignment from the Activity Assignments screen:

1. Navigate to the Activity Assignments screen for the relevant Engagement:
 1. Navigate to the Engagement Dashboard for the Engagement containing the Element for which you want to generate Assignments.
 2. In the menu on the left-hand side, point to **Activity** and select **Assignments**.
2. For the required Activity, point to the plus icon (+) and click **Add Model Assignment**.



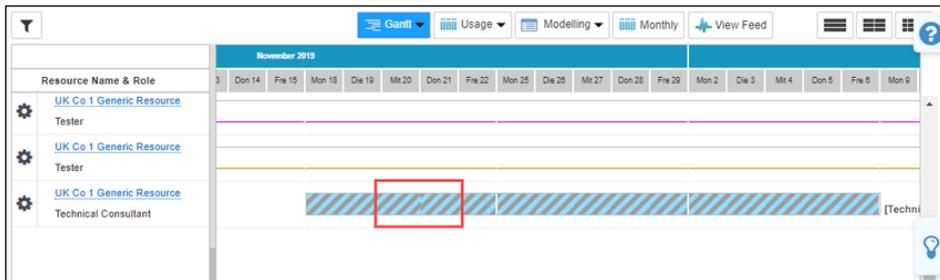
3. In the add Assignment window, select the appropriate **Resource** to populate the rest of the fields.
4. In the **Num of Assignments** field, enter the number of Assignments the model represents.
For example, if you are modelling a demand for five Resources, enter 5.
5. Complete the remaining fields as required.
6. Click **Save** or **Save and New**.

Manually Profiling Model Assignments

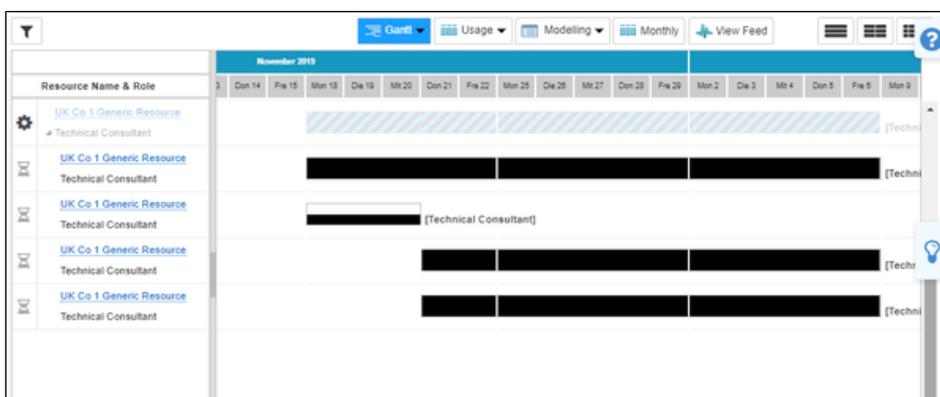
Providing that the Activity Assignment that you are modelling has a Usage Behaviour that permits Manual Profiling, you can Manually Profile your Model Assignments and the draft child Assignments you create from them.

Profiling the model enables you to create Draft Assignments based on the profile and the Usage Behaviour specified for the Model Assignment. These Draft Assignments are unprofiled and of varying lengths.

Model Assignment Gantt bar indicates where the changes occur by altering the pattern:

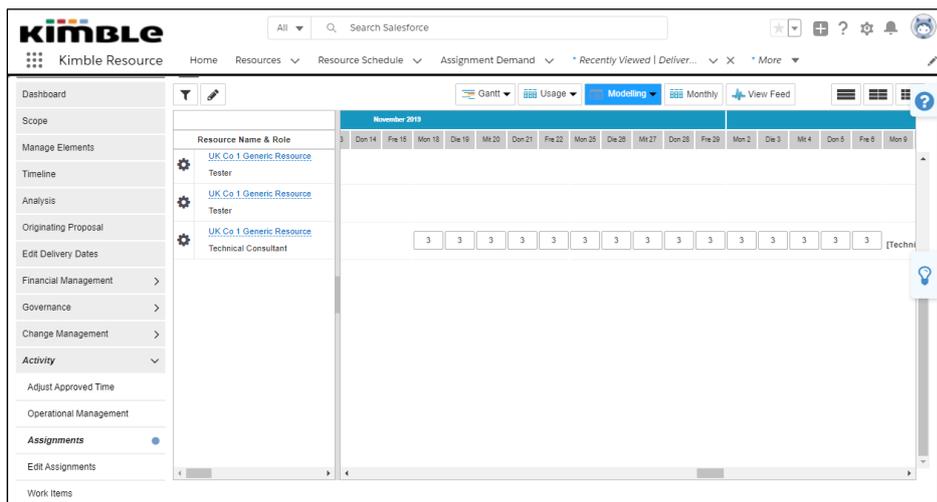


The Draft Assignments are created accordingly.



Number of Assignments

To change the number of child Assignments to create for a period (day, week, month), use the **Modelling** view.



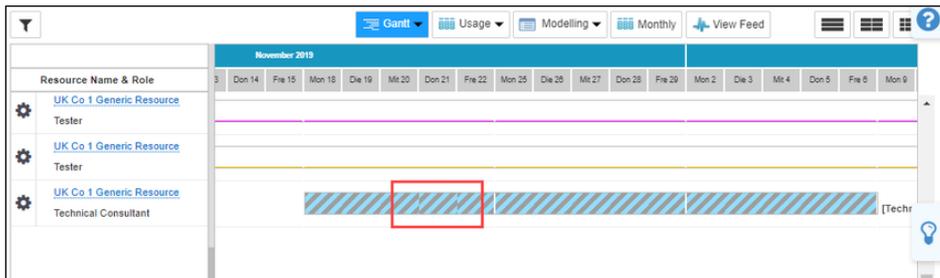
1. From the Modelling drop-down list, select the period for which you want to profile the Model Assignment.
2. Click the **Edit** (✎) button.

3. Update the cell values.

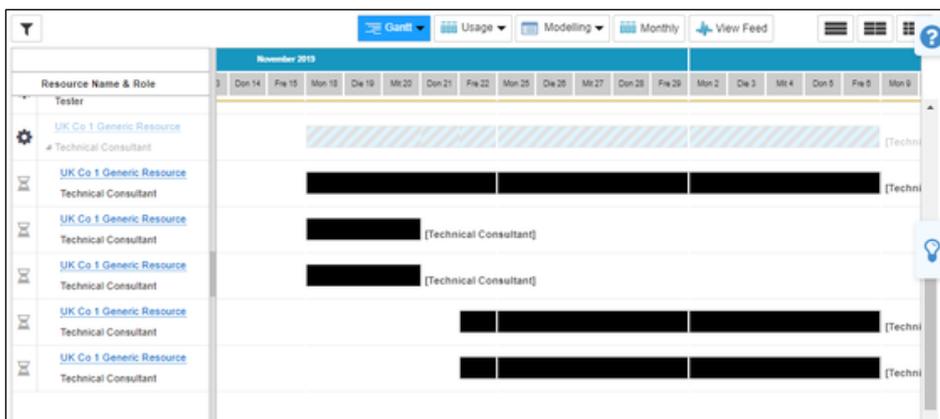


4. Click **Save**.

If you have modelled a different number of Assignments for different periods, the Model Assignment Gantt bar indicates where the changes occur by altering the pattern:



The Draft Assignments are created accordingly:



Manually Profiling Draft Assignments

You can Manually Profile the Draft Assignments to change the hours or days required per period, or reduce or extend the Assignment. Do this by selecting the period for which you want to profile the Assignment from the Usage drop-down list.

If you revert to the Model Assignment, any changes you make here are lost.

Generating Draft Assignments from the model

You can generate and edit Draft Assignments from the Model Assignment on the Proposal Scope screen or on the Assignments screen. If required, you can edit the draft Assignments individually before activating them to create open demand.

Proposal Scope screen

The Assignment percentage is not generated for child Assignments when in the Expected Usage Forecast Mode. You add this manually, to enable you to control how the Assignment is broken down between Resources.

To generate draft Assignments in the Proposal Scope (Edit Delivery Element) screen:

1. Navigate to the Proposal Scope screen for the Proposal containing the Element for which you want to generate Assignments.
2. Click the burger menu in the required Element card and select **Configure Element** to display the Edit Delivery Element window.
3. In the left-hand column of the modelled Assignment row, click  to apply the model Assignment and generate the child Assignments.
4. In the confirmation message that appears, click **OK**.
5. Click **Save and Close** to list the draft Assignments the model Assignment and lock the model Assignment.

Activity Assignments screen

To generate draft Assignments in the Assignments screen:

1. Navigate to the Engagement Dashboard for the Engagement containing the Element for which you want to generate Assignments.
2. In the menu on the left-hand side, point to **Activity** and select **Assignments**.
3. From the  menu for the model Assignment, select  to apply the model Assignment and generate child Assignments.
This locks the model Assignment. If you want to edit the model Assignment, you need to remove the draft Assignments first (see below).

Editing and resetting draft Assignments

You can edit the draft Assignments individually or you can delete them, edit the model, and then reapply the model to create a new set of identical draft Assignments.

If you change the draft Assignments individually but then need to revert them, you can reset them to the Model Assignment's specification.

Removing or resetting Assignments

In the Edit Delivery Element window, the options for reverting and removing child draft Assignments are in the left-hand column of the Resource table in the Assignments tab. In the Assignments screen, they are available from the Actions menu () for the original Model Assignment.

To remove all draft Assignments for a model, click  and then click **OK** when prompted.

To reapply the model or to revert all existing draft Assignments to the original model specification, click  and then click **OK** when prompted.

Activating draft Assignments

To create Assignment Demand for a Model Assignment's draft child Assignments, you must activate the Assignment.

In the Edit Delivery Element window, the option for activating modelled Assignments is in the left-hand column of the Resource table in the Assignments tab. In the Assignments screen, it is available from the Actions menu () for the original Model Assignment.

To activate all draft Assignments for a model, click the **Activate Model Assignments** toggle () and then click **OK** when prompted.

Activating the draft Assignments removes the model Assignment. If you change the newly activated Assignments after this point, you can no longer revert them.

Creating Model Assignment Templates

You can add Model Assignments Templates to Products so that when the Product is used, it automatically creates the Model Assignment.

To create a Model Assignment Template:

1. Navigate to the Product.
2. In the left-hand menu, click **Activity Assignment Templates**.
3. In the Activity Assignment Templates screen, click **New Model Assignment Template**.
4. Complete the mandatory fields, and any other fields as required.
5. Click **Save**.
Creating an Element with this Product automatically creates a Model Assignment as defined.