



Resource Usage Visibility Enhancements
Feature Guide
Summer 18



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Introduction

In Kimble’s Summer 18 Release, Kimble has introduced enhancements to Gantt functionality that allow you to see constraints and conflicts when scheduling your resources, including:

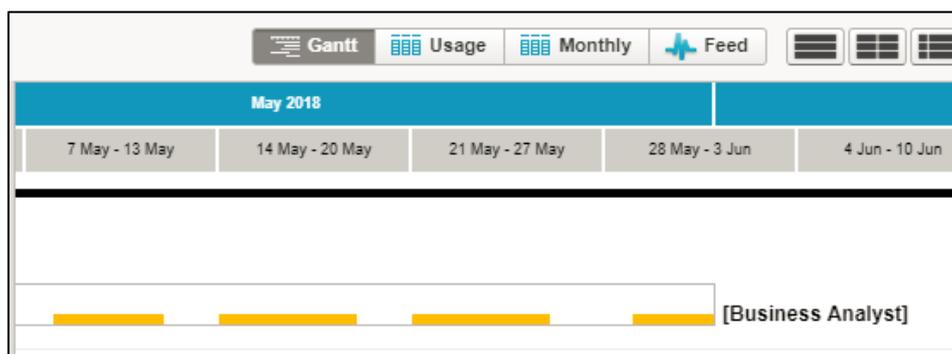
- New icons on Gantt lines indicate that time has been scheduled.
 - Prior to Summer 18, Assignments could be scheduled, with or without a start and end time.
 - In Summer 18 it is now possible to schedule Tasks, making those scheduled days appear with a pin or clock icon on Assignment Gantts (depending on whether the Task has Start and End Times or not). Plan Gantts also now display new icons and pop windows that show over-utilization on the Plan Gantt. For more on these Task Enhancements, see the [Task Enhancements Feature Guide](#).
- New icons appear on Aggregate Gantt lines, detailing whether the Resource is over-utilized on the Assignment being managed, or across all Assignments
- Ability to view a Resource’s other Assignment commitments in a new Utilization Popup on Activity Assignments Gantt screen
- New Usage View on Gantt screens displays number of hours assigned per day, making it easier to see how much a Resource is over-utilized and on which Assignments

Essential Concepts

This guide will cover enhancements that apply to four different types of Gantt screens: Assignments, Assignment Demand, Resource Schedule, and Resource Calendar.

Assignments

On any Resourced Activity – whether it is a Delivery Activity, a Pre-Sales Activity, or an Other Activity, you will manage Assignments through an Assignments Gantt. This Gantt displays all Assignments on the Resourced Activity.



In addition to the new Usage View, the Assignments Gantt screen includes the following Views:

- *Gantt*, which displays all Assignments as bars (dictated by Utilization percentage).
- *Monthly*, which allows you to shape an Assignment by dictating specific Usage amounts for each month.
- *Feed*, which displays the Chatter feed for the Resourced Activity.

Assignment Demand

A resourcing demand is created for each Assignment that has a Generic Resource holding a place for a specific Resource yet to be named. The Assignment Demand screen allow you to view, manage and fulfill these demands.

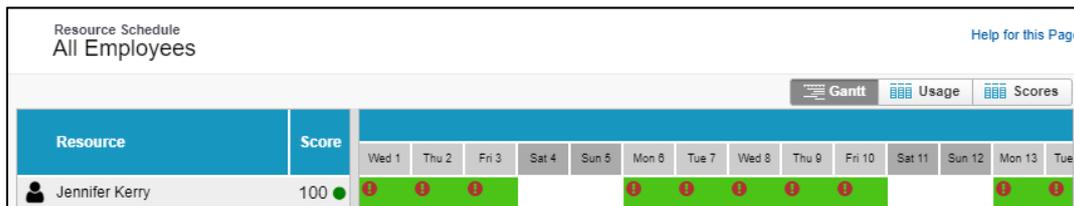


In addition to the new Usage View, the Assignments Gantt screen includes the following Views:

- *Gantt*, which displays all Summary Gantts for Resources that meet the filter criteria, with the ability to drill down to Assignment Gantt lines and Tasks.
- *Scores*, which details the Capability Score of all Resources that meet the filter criteria.
- *Details*, which displays all details of the Assignment Demand.
- *Feed*, which displays Chatter activity for the Assignment Demand.

Resource Schedule

The Resource Schedule view displays a 12-month view of Assignments for all Resources that meet the filter criteria, displaying their availability from the earliest open Tracking Period.

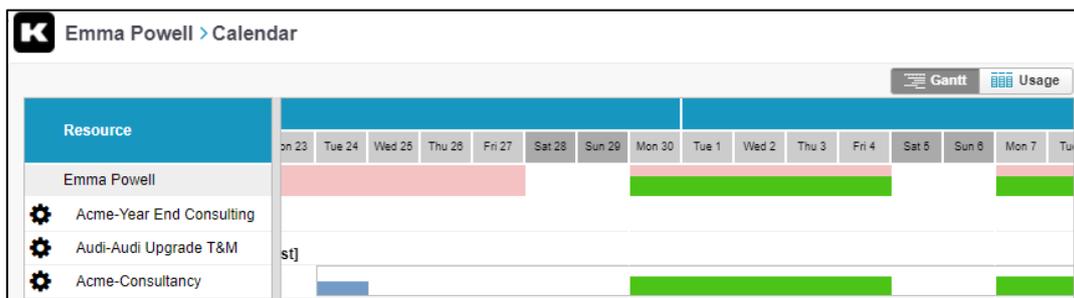


In addition to the new Usage View, the Resource Schedule screen includes the following Views:

- *Gantt*, which displays all Summary Gantts for Resources that meet the filter criteria, with the ability to drill down to Assignment Gantt lines and Tasks.
- *Scores*, which details the Capability Score of all Resources that meet the filter criteria

Resource Calendar

The Resource Calendar view displays a 12-month view of Assignments for a specific Resource, starting from the earliest open Tracking Period.



In addition to the new Usage View, the Resource Calendar screen includes the *Gantt*, which displays all Assignments as bars (dictated by Utilization percentage).

Visibility of Scheduling Conflicts

In Summer 18, Kimble has added a pin icon on Gantt views which joins the existing clock icon in revealing where a Resource has been specially assigned a scheduled day.

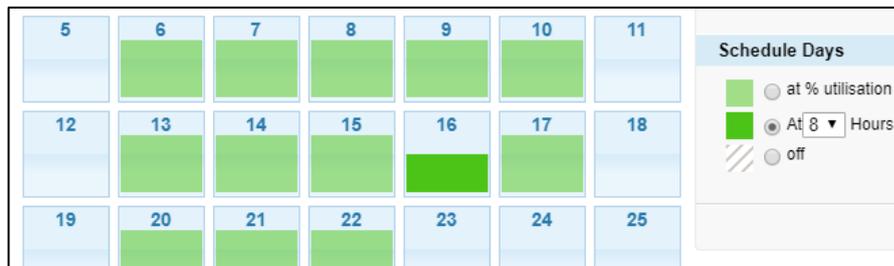
Resource	Primary	ed 2	Thu 3	Fri 4
Ian Jacob	Business	BC	BBC	BBC
Luke Walker		TA	STA	STA

The table below defines when each icon will appear.



Appears when a Resource is scheduled on this day, with no Start and End Time. The pin icon indicates an activity on a specific day – on the Assignment level or the Task level – that has been set aside as significant.

- This can be achieved by scheduling a day in the Assignment Calendar as *At ___ Hours*.



- Or – in Summer 18 – by setting a Task to *Is Scheduled*. See [Task Management Enhancements Feature Guide](#) for more details.

Task - 3.0 Test

Details | Resources | Predecessors | Advanced

Task:

Duration (Days): Effort (Hours):

Start Date: End Date:

Fixed Effort:

Is Scheduled Calendar Show As:

Task Category:

Notes:

External Id: External Id URL:

OK Cancel



Appears when time is scheduled on this day, with Start and End Time.

- This can be achieved by setting a day in the Assignment Calendar as *at a specific time* and defining a *Start Time* and *End Time*. (Controlled by *Scheduled Time Rule* on Edit Resourced Activity.)

- Or – in Summer 18 - by defining Start and End Times for a Task. (Controlled by *Tasks Have Start And End Times* checkbox in conjunction with *Is Scheduled* checkbox on Edit Resourced Activity.) See [Task Management Enhancements Feature Guide](#) for more details.

Visibility of Over Utilization

Two icons indicate where a Resource is over utilized on a given day.

	Indicates number of hours Resource has dedicated to this Assignment exceeds the number of hours available.
	Indicates number of hours Resource has assigned on this day exceeds the number of hours available, across this Assignment and all other Assignments.

The Over Utilization Icons appear:

- On Gantt lines in the Gantt view.



- On the Activity Assignments screen, next to the Resource's Start Date.

Resource Name & Role	Revenue Rate	Start Date	End Date
Activity: #9899			
Andrew Smith	GBP 125.00 / Hour	26/03/2018	04/04/2018
Ian Jacob	GBP 150.00 / Hour	16/04/2018	24/04/2018

- On the [Utilization Pop Up](#).

23/04/2018: Ian Jacob

Required (hrs) **10** Used (hrs) **8** Available (hrs) **0**

Activity Assignments

	Wed 18	Thu 19	Fri 20	Mon 23	Tue 24	Wed 25	Thu 26	Fri 27
BBC-Spec & Design				8	8	8	8	8

Visibility of Conflicting Assignments

In Usage View on the Activity Assignments screen, you can click the Usage cell on a day to view the Utilization Pop Up, which allows you view details of all Activities that are impacting on a Resource's Utilization.

To view the Utilization Pop Up:

- Navigate to an Activity Assignment.
- Click *Usage*.
- Click on a cell.

The screenshot shows the 'Audi Upgrade (E000034) > Assignments' screen. The left sidebar has 'Assignments' selected (1). The main area shows a table of resource assignments. The 'Usage' view is active (2). A grid shows resource usage for various dates. A cell for 'Philip Gillet' on 'Mon 23' is highlighted in red (3).

Resource Name & Role	Revenue Rate	Start Date	End Date
Activity: Audi Upgrade T&M			
Brian Keeling Project Manager	EUR 1,389.47 / Day	26/02/2018	24/04/2018
Emma Powell Business Analyst	EUR 1,056.00 / Day	26/02/2018	20/04/2018
Philip Gillet Technical Consultant	EUR 1,200.00 / Day	26/02/2018	23/03/2018

The Utilization Pop Up is displayed, indicating:

- Required: the usage calculated for this Assignment
- Used: the usage forecast on other Assignments
- Available: the usage available after subtracting what has been forecast as Used
- Date clicked on, highlighted in yellow.
- Over Utilization Icon(s), if the user is over utilized

26/02/2018: Philip Gillet !								
Required (hrs)	8		Used (hrs)	4		Available (hrs)	4	
Activity Assignments	Wed 21	Thu 22	Fri 23	Mon 26	Tue 27	Wed 28	Thu 1	Fri 2
Training and Conferences								
Vacation/PTO								
Audi-Fixed Price Effort%Com...				4	4	4	4	4

K Usage cannot be edited from within the Utilization Pop Up because Kimble automatically calculates Usage on a particular day based many factors, including the Usage Behaviour Rule of the Assignment and any constraints the Resource has on any other days.

Usage View

In Summer 18, Kimble has introduced a new Usage View that appears on Activity Assignments, Assignment Demand, Resource Schedule, and Resource Calendar screens. In surfacing a Resource’s Assignments with the precise amount of effort dedicated on each day to each activity displayed, the Usage View improves visibility, particularly of over-utilization.

Is the Resource slightly over-utilized, which may be perfectly acceptable, or do they have 16 hours of work to complete in one day, which likely will not be possible? This view brings clarity to Assignment Usage and helps Resourcing Managers make important decisions.

Activity Assignment Requests
Star Energy-ERP Implementation - Contingency (Open)

Fulfilment Mode: Candidate Replace

Open Need

Resource	Reve	Mon 9	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14	Sun 15	Mon 16	Tue 17	Wed 18
#Generic - Business Analyst		.8	.8	.8	.8	.8			.8	.8	
Andrew Smith	Primary		19.76	19.76	19.76	19.76			19.76	19.76	.8
Star Energy-Spec & Build			11.81	11.81	11.81	11.81			11.81	11.81	
Star Energy-ERP Implementation - Phase			4	4	4	4			4	4	
Test 1-#9899			4	4	4	4			4	4	
Training and Conferences											
Vacation/PTO											

Blue cells indicate Approved Time

Blue dotted outlines indicate Time is scheduled on this Activity Assignment

Red Cells indicate that the Resource is over utilized across all Assignments

Amber Cells indicate that the Resource is over utilized on a specific Assignment

Grey dotted outlines on the Assignment Demand or Resource Schedule indicate the Resource has Time scheduled on at least one Activity



Usage cannot be edited from within the cells on the Usage View because Kimble automatically calculates Usage on a particular day based many factors, including the Usage Behaviour Rule of the Assignment and any constraints the Resource has on any other days.

To open the Usage View:

1. Navigate to an Aggregate Gantt screen and set appropriate filters if applicable.
2. Click *Usage*.



3. On Resource Schedule and Assignment Demand, click a Resource name to drill down through the Summary Gantt into their individual Assignments.

Resource	Primary	Thu 3	Fri 4	Sat 5	Sun 6	Mon 7	Tue 8
Andrew Smith	Project M	12	12			12	12
▶ Star Energy-ERP Implementation - Phase		4	4			4	4
BBC-Risk Consulting							
▶ Audi-Digital Services Plan		8	8			8	8