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Introduction

From Summer 20, Kimble has introduced Automated Resource Matching, enabling you to determine the best available resource(s) for an assignment based on role, skills required, and availability, with no manual effort.

You define when Automated Resource Matching is triggered, then Kimble will either:

- assign a single resource automatically, with no further effort, or
- nominate qualified Resources as candidates.

Automated Resource Matching can be used to resource “commodity” assignments automatically. For example, you might wish to instantly assign 10 available QA Testers with the right skills to a project, where prior to Summer 20 you would have spent time selecting from the 36 available.

Where you wish to retain some discretion, Automated Resource Matching will return a selected number of Candidates which meet your criteria, so that you can swiftly pick an appropriate Resource. Prior to Summer 20 you would have to have navigated the Assignment Demand or Assignment Searches screens, and individually nominated suitable Resources as candidates.

A new Review Candidates pop-up window enables you to swiftly compare and contrast, then Accept or Reject Candidates.

You can configure Automated Resource Matching, including:

- Whether Resource Matching is triggered automatically on creation of an Assignment Demand, or whether it is done manually.
- Whether a matching Resource is automatically assigned, or whether a configurable number of Candidates is returned.
- Which Assignment Demand and which Resources are included in Automated Resource Matching.
  For example, you could automatically assign QA Testers but not Project Managers, or exclude specific Resources who should not be part of this automated process, such as the Test Manager.
- Which filters are used. Role, Business Unit, Capabilities, Grade and Location are available by default, as are any custom filters you may use on Assignment Demand.

Essential Concepts

Assignment Demand

A resourcing demand is created for each Assignment where a placeholder Resource that represents demand (e.g. a Generic Resource), has been assigned to an Activity. These Resources can be assigned when creating the assignment, or by replacing a Specific Resource on an assignment to create a new Demand. The Assignment Demand screen allows you to select an Activity Assignment and search for the appropriate Resource to fill that Assignment using filters (including Capabilities). Often this will be used to fill open
demand for a Resource where a Generic Resource is acting as a placeholder. You can select a Resource to replace the Generic Resource and fill that open demand, or you can propose multiple Candidates.

**Resource**

Resources perform roles on activities related to Delivery Engagements, Pre-Sales Activities or Other Activities.

**Generic Resource**

Generic Resources are used to record demand for a resource of a given profile.

**Availability Scoring**

Availability Scoring in Kimble ranks Resources by their Availability match to the specified Assignment or Date. Availability Scores convey a Resource’s fit for the Assignment calculated on a day-by-day basis, and based on their assignment to other Activities. From Summer 20, Availability Scoring is used in Automated Resource Matching to only match available Resources.

**Capabilities**

Capabilities can be profiled for both Resources (what Capabilities they have) and Assignments (what Capabilities are needed to fulfil the demand for an Assignment). Specifying required Capabilities for an Assignment allows Resource Managers to know what Capabilities will be needed to successfully carry out an Assignment, and to determine which Resource is best qualified to meet those requirements when replacing a Generic Resource or proposing Candidates on the Assignment Demand screen. In Summer 20, Capabilities are used in Automated Resource Matching, to only match Resources with the relevant Capabilities.

For more on managing Capabilities see [Capability Management Enhancements (Winter 18, 1.26)](#)

**Assignment Classes**

Assignment Classes are used on Summary Ganttts (Assignment Demand and Resource Schedule) to represent the type of Assignment a Resource is dedicated to, differentiating in a visually dynamic way between Resourced Activity Types, Assignment Probabilities, and Unavailability due to Other Activities.

Common Assignment Classes include:

- Available
- Unavailable
- Firm Delivery
• Working at Risk
• Probable Delivery

These Assignment Classes appear on Summary Gantt screens as different colors, which are defined in the legend at the bottom right of the Summary Gantt screen.

You can exclude Assignment Classes from Availability Scoring when using Automated Resource Matching. (New for Summer 20.)

Assignment Modelling

Assignment Modelling enables 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.

From Summer 20, Automated Resource Matching can be triggered for Model Assignments once the Model Assignment is Activated. See Assignment Modelling (Winter 20) for more details.

Resource Matching Rules

Search Criteria define the attributes of the Generic Resource which will be used when searching for Resources to match an Assignment Demand.
Where fields are specified on the Demand Assignment, Resources are considered a match as follows:

- Assignment Role: Matched to any Role held by the Resource
- Assignment Location: Matched to the Resource’s location
- Generic Resource Business Unit: Matched to the Resource’s Business Unit
- Generic Resource Secondary Business Unit: Matched to the Resource’s Secondary Business Unit
- Generic Resource Grade: Matched to the Resource’s Grade

The Resource Grade must be an exact match. Resources of higher or lower Grades will not be matched.

If Required Capabilities are configured against the demand assignment, Resources must hold them all at least at the minimum required rating, with any that have an expiry date set to expire after the Start Date of the Assignment.

An org-wide setting: **Exclude Resources from Automated Match where required capability has expired** can be toggled off, if you wish to Auto-Match Resources whoseCapabilities will have expired on the Start Date of the Assignment.

Resources must meet at least the availability requirements at the aggregated weekly level, (e.g. if 1 day is required in a week, they must have an availability score of 20 or greater in that week).

Resources meeting the above requirements are then screened and must meet the availability requirements at the daily level (e.g. if 1 day is required in a week, they must have an availability score of 100 on that day).

The org-wide setting: **Minimum Availability Score required in order to match during Automated Resourcing matching search** can be configured to lower the availability requirements.

Changing **Minimum Availability Score required in order to match during Automated Resourcing matching search** from 100 to 50 would result in Resources with at least half a day available that week meeting the initial screening requirements in the above example, then Resources with at least half a day availability on the relevant day being matched.

**Triggering Automated Resource Matching**

Depending on the configuration of the relevant Generic Resource, you can trigger Automated Resource Matching automatically on the creation of a new Assignment Demand or manually through the User Interface.
Automatic Triggering

Where a Generic Resource has been configured to trigger Automated Resource Matching automatically, this happens on the creation of any new Assignment Demand.

Automatic Triggering is run from an Event Class, and may be configured further, see Activating the Event Classes for details.

Manual Triggering

Manual triggering allows you to choose when Automated Resource Matching takes place, allowing you to first refine the Demand.

For example you may choose to configure a Generic Technical Architect Resource which can be assigned to any project, you would then refine the required Capabilities for that specific project, and only then run Automated Resource Matching.

To manually trigger Automated Resource Matching:

1. Navigate to the relevant Engagement (or, if looking to trigger for the Bid Team, navigate to the Proposal).
2. Click Activity >> Assignments. (or Manage Bid Team >> Assignments)
3. Click the cog icon next to the relevant Assignment.
   Refine the Assignment Demand details (such as Capabilities, Manual Profiling) at this stage if required.
4. Click the Auto Match Demand Assignment icon:

   ![Cog icon changing to spinning icon](image)

The cog changes to a spinning icon while Automated Resource Matching triggers.

Automated Resource Matching Statuses

Once Automated Resource Matching has been triggered, the Status is surfaced via:

- Charms against the Assignment on the Activity Assignments/Bid Team pages:
Charms on the Engagement Dashboard:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Charm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Automated Resource Matching has been triggered, Kimble is searching for suitable Resources.</td>
<td><img src="image" alt="Charms" /></td>
</tr>
<tr>
<td>Auto Match has Assigned</td>
<td>Where the Generic Resource has been configured to be Replaced, and a suitable Specific Resource has been automatically Assigned.</td>
<td><img src="image" alt="Charms" /></td>
</tr>
<tr>
<td>Resources</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candidates Found for Review</td>
<td>Where the Generic Resource has been configured to Return Candidates, and one or (where configured) more suitable Resources have been found and are ready for review. Once a Candidate is accepted, this Charm is no longer displayed.</td>
<td><img src="image" alt="Charms" /></td>
</tr>
<tr>
<td>No Auto-Matches Found for Demand</td>
<td>No suitable Resources were found.</td>
<td><img src="image" alt="Charms" /></td>
</tr>
</tbody>
</table>
Review Candidates

From Summer 20, a new pop-up window enables you to compare and contrast proposed Candidates and accept or reject them.

The Review Candidates pop-up can be used where Candidates have been proposed both manually, and via Automated Resource Matching.

To Review Candidates:

1. Navigate to the relevant Engagement (or Proposal for Pre-Sales Assignments).
2. Click Activity >> Assignments. (or Manage Bid Team >> Assignments)
3. Click the cog icon next to the relevant Assignment.
4. Click the Review Candidates icon:

The Review Candidates pop-up is displayed.

<table>
<thead>
<tr>
<th>Details</th>
<th>1Generic - Project M...</th>
<th>Delbert Young</th>
<th>Kirk Roy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Project Manager</td>
<td>Project Manager</td>
<td>Project Manager</td>
</tr>
<tr>
<td>Location</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Grade</td>
<td>-</td>
<td>Junior Consultant</td>
<td>Principal Consultant</td>
</tr>
<tr>
<td>Revenue Rate (Day)</td>
<td>GBP 1,000.00</td>
<td>GBP 1,000.00</td>
<td>GBP 1,000.00</td>
</tr>
<tr>
<td>Cost Rate (Day)</td>
<td>GBP 350.00</td>
<td>GBP 500.00</td>
<td>GBP 484.32</td>
</tr>
<tr>
<td>Margin</td>
<td>65</td>
<td>44</td>
<td>51.57</td>
</tr>
<tr>
<td>Start Date</td>
<td>07/06/2021</td>
<td>07/06/2021</td>
<td>07/06/2021</td>
</tr>
<tr>
<td>End Date</td>
<td>18/06/2021</td>
<td>18/06/2021</td>
<td>18/06/2021</td>
</tr>
<tr>
<td>Utilisation</td>
<td>50</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>Effort (Day)</td>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Assigned Until</td>
<td>-</td>
<td>31/05/2020</td>
<td></td>
</tr>
</tbody>
</table>

5. Review the Candidate details, then click the green thumbs up icon to accept a Candidate or the red thumbs down icon to reject them. Accepting a Candidate replaces the Generic Resource and automatically rejects all others.
Clicking the name of a Candidate displays further details about them in a Resource Hover Pop-Up.

Additional Resource-specific Fields can be displayed in the Resource Hover pop-up.

To display additional Fields, add them to the ResourceHoverDetails Fieldset, or have your Kimble System Administrator contact Kimble for assistance.

Note that Revenue Rate and Margin comparisons will appear only for Assignments on T&M projects.

Configuring Automated Resource Matching
Kimble Config Settings

To enable Automated Resource Matching in your org:

1. Navigate to Reference Data >> Kimble Config
2. Toggle on Enable Automated Resource Matching to Assignment Demand.
3. Toggle on Enable Resource Usage Analysis (required for Auto-Resourcing and Resource Availability Scoring features)
4. Set the Number of Months for which Resource Usage Analysis is derived. This setting defines how far into the future Resource Usage Analysis is carried out by Kimble. By default it is set to 24, allowing you to run Automated Resource Matching on Assignments that go up to 2 years into the future.
5. Set the Minimum Availability Score required in order to match during Automated Resourcing matching search. By default this is set to 100, meaning the Resource must be available for the full Assignment. Reducing the score will allow you to match Resources who mostly fit. More on Availability Scoring can be found in the Availability Matching Feature Guide.
6. Set the Default Number of Resources suggested as Candidates by Automated Resource matching search.
By default this is set to 1, but can be increased should you wish, for example, to have 3 suitable candidates suggested.

Activating the Event Classes

Two Event Classes must be activated to enable automatically trigger Automated Resource Matching on the creation of, or substantial change of an Assignment Demand.

We recommend that your Kimble System Administrator contact Kimble to review whether these criteria meet your requirements.

Event Classes may be further configured as part of a Professional Services Engagement.

To activate the Event Classes:

1. Navigate to the Event Classes tab.
2. Click Auto Match Demand.
3. Check the Active? checkbox.
4. Click Save.
5. Repeat the above steps for Event Class: Auto Match Demand - Resubmit.

Resource Settings

Settings on the Resource allow you to:

- Define which Generic Resources will use Automated Resource Matching, whether the Matching is triggered manually or automatically, and whether the Generic Resource is replaced, or Candidates are suggested.
- Exclude specific Resources who you do not wish to be included in Automated Resource Matching.

Configuring Generic Resources for Automated Resource Matching

You can configure each Generic Resource to define when Automated Resource Matching is triggered (automatically, manually, or never), and whether the Generic Resource is automatically replaced or, if Candidates are returned, allowing you to pick from suitable options.

To configure a Generic Resource for Automated Resource Matching, the field: Auto Matching Fulfilment Mode must be added to the Resource Page Layout.

To configure a Generic Resource for Automated Resource Matching:

1. Navigate to the relevant Generic Resource.
2. Click Maintain Resource.
3. Select the relevant Auto Matching Fulfilment Mode:
o Manual (Auto Match Off)
  Automated Resource Matching is not used for this Generic Resource.

o Candidate (Automatically Triggered)
  This Generic Resource will automatically return Candidates.

o Replace (Automatically Triggered)
  This Generic Resource will automatically be replaced by a suitable specific Resource.

o Candidate (Manually Triggered)
  This Generic Resource will return Candidates when you manually trigger Automated Resource Matching.

o Replace (Manually Triggered)
  This Generic Resource will be replaced by a suitable specific Resource when you manually trigger Automated Resource Matching.

4. To return a number of Candidates different to the default number in the “Default Number of Resources suggested as Candidates by Automated Resource matching search”, enter a value in the Auto Matching Number of Candidates field.

The Auto Matching Number of Candidates field must also be added to the Resource page layout.

5. Click Save.

Excluding a specific Resource from Automated Resource Matching

You may exclude specific Resources from Automated Resource Matching. For example you might have a QA Test Team Manager who could potentially step onto a project if circumstances demand it, but who you would not want to be assigned automatically.

To exclude a specific Resource from Automated Resource Matching:

1. Navigate to the relevant Resource record.
2. Check the Exclude from Auto Matching checkbox.
3. Click Save.
Assignment Classes

By default, all Assignment Classes are marked **Include In Auto Match Score Pct**. This means that all assignments count as utilisation when calculating the available utilisation in a particular period.

You may configure some “softer” Assignment Classes to be excluded from this calculation. For example, you could ignore Possible Assignments, or Pre-Sales, if you would always prefer to assign Resources to Firm customer work instead.

- It is recommended that **Include In Auto Match Score Pct** is relaxed only for classifications which represent activity that can be dropped if the Resource is auto-matched to an Assignment.
- It is also strongly recommended that **Include In Auto Match Score Pct** must be set against Candidate assignments, as otherwise the same Resource can potentially be matched as a Candidate to multiple assignments at the same time.

To set an Assignment Classification as not included in Auto Match Score Pct, or for further assistance with your Assignment Classifications, please have your Kimble System Administrator contact Kimble.

Search Criteria

On upgrade to Summer 20, Kimble creates a default set of Automated Resource Search Criteria based on the currently configured search fields available on the Assignment Demand page.

These new Search Criterion can be varied independently from those applied during manual resourcing.

To vary your Search Criterion, please have your Kimble System Administrator contact Kimble.
The below checklist lists the configuration steps for Automated Resource Matching, and highlights which are advanced optional configuration, where you will be required to contact Kimble to make changes.

<table>
<thead>
<tr>
<th>Configuration Step</th>
<th>Advanced/Optional (Contact Kimble)</th>
<th>Notes</th>
<th>Check</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kimble Config &gt;&gt; Toggle on Enable Automated Resource Matching to Assignment Demand.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kimble Config &gt;&gt; Toggle on Enable Resource Usage Analysis (required for Auto-Resourcing and Resource Availability Scoring features)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kimble Config &gt;&gt; Set the Number of Months for which Resource Usage Analysis is derived.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kimble Config &gt;&gt; Set the Minimum Availability Score required in order to match during Automated Resourcing matching search.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kimble Config &gt;&gt; Set the Default Number of Resources suggested as Candidates by Automated Resource matching search.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activate the Event Classes:</td>
<td>Contact Kimble to ensure these criteria meet your requirements</td>
<td>Required only where you wish to automatically trigger Automated Resource Matching.</td>
<td></td>
</tr>
<tr>
<td>• Auto Match Demand</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Auto Match Demand - Resubmit</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
If you want to return a number of Candidates different to the default number in the “Default Number of Resources suggested as Candidates by Automated Resource matching search”, add field; **Auto Matching Number of Candidates**. |  
| Exclude specific Resources from Automated Resource Matching | Field: **Exclude from Auto Matching** field must be added to the Resource Page Layout. |  
| Exclude “soft” Assignment Classes from the Auto Match Availability Scoring | Please contact Kimble for assistance. |  
| Search Criteria | Please contact Kimble for assistance. |  