# Creating a New Resource Portfolio in Planview

NOTE: Proposal Managers Leads only. Read only access on a case by case basis (work grants required) for Proposal Managers.

NOTE: Maintenance of data is acceptable but additions or deletions are only done by the PMO.

**Planview Conventions and General Information** 

**Document Conventions** 

**Get Started** 

**New Resource Portfolio** 

Advanced Options

**Portfolio View** 

# 1. Planview Conventions and General Information

- 1.1. <u>Unless otherwise indicated, mouse clicks (single or double) are done using the **left** <u>mouse button.</u></u>
- 1.2. Register for the Planview Customer Success Center here.

Figure PVD1. General Planview user interface functionalities.

	Banner	Applications	Business Technolog	gy Information In	vestments	Explorer Administra	ation + New	Q Search	•0
:	Portfolio My Applicat	ions Context ba	r Tile	Menu ba	ar		New menu	Search bar	pplications menu
	7	1.	<b>C</b> <sup>+</sup>	.÷Ξ	72				My account menu
P	Portfolio Manager	App Complexity Assessment	App Deployment Distribution	App Usage vs Complexity	App Deployment Lifecycles by	App Cost Details	More	bon	
7	Applications	III App Usage	e Details	- Column	set picker		Refresh	Enter text to filter grid	¥ \$
T	Add Filter 🗸	IT Owner: Current User	OR Business Owner: Cu	rrent User	Filter bar				Export data
	▲Name				Number of Users		Supported Org Count	Application Consumer Coun	
:	CRM-Customer F	Portal				2,000		5	Settings
	Customer History	/ System			78		3		
:	Customer Info Center System			112			2		
e-Commerce Secure Cloud					45		5		
:	General Ledger				100		2		
NextGen Customer Insights Platform					50		7		
:	PPM							1	

1.3. Access the **Preferences** dialog box by clicking the head and shoulders icon in the upper right corner of the **My Overview** screen menu bar.

NOTE: Preferences remain set once initially selected unless they are changed later.

- 1.3.1. Click General on the left side of the Preferences dialog box and click the down caret next to Timescale on the right side, then click Months to select that preference from the listed options in the dropdown box.
- 1.3.2. Click **Resources** on the left side of the **Preferences** dialog box and click the down caret next to **Timescale** on the right side, then click <u>Months</u> to select that preference from the listed options in the dropdown box.
- 1.3.3. Click Financial and Investment Planning on the left side of the Preferences dialog box and click the down caret next to Currency Scale on the right side, then click Standard to select that preference from the listed options in the dropdown box.
- 1.3.4. Also in the Financial and Investment Planning menu of the Preferences dialog box click the down caret next to Currency Decimal Precision on the right side, then click zero [0] to select that preference from the listed options in the dropdown box. See figures PVD2, PVD3, (and) PVD4.

Figure PVD2. Preferences / General.

erencea		
General	Duration Unit:	Days
	Effort Unit:	Days
Resources	Timescale:	Months
	Decimal Precision for Effort and Duration:	1
Financial and Investment Planning	Date and Time Display:	Do not show time
	Date and Duration:	Recalculate duration when entering finish date
	Leaf Level Requirement Assignment Type:	Allocation
	Select Language for Email Notifications:	English
	Display if Resource Image is Unavailable:	Resource Name
	Calendar Week Starting Day:	Sunday

Figure PVD3. Preferences / Resources.

Preferences	
General	Timescale: Months
Resources	
Financial and Investment Planning	

Figure PVD4. Preferences / Financial and Investment Planning.

eferences		
General	Currency Scale:	Standard 1
	Currency Decimal Precision:	0 7
Resources	Effort Unit - Financial Planning:	Days
Financial and Investment Planning	Show Currency Symbol:	

- 1.4. Only a Project Manager, Project Manager Lead, Proposal Manager, Proposal Manager Lead, or Planview Admin associated with a project can view and/or edit that project. Portfolio Managers can view the entire portfolio.
- 1.5. Planview is a browser-based tool running in a browser window (or windows). As such it does not install in the user's local PC and is available from anywhere the user is able to securely access the internet.
- 1.6. Because Planview is a browser-based tool running in a browser window (or windows), <u>do not</u> use the browser close icon to exit the tool. Use <u>only</u> the Planview Close icon (the X in the upper right corner of the toolbar) when in the Work and Resource Management screen (or) the Close & Complete icon in the Financial Planning Details screen to stop working in Planview. Work is not saved if the browser session itself is closed instead. See figures PVD5 (and) PVD6.

Figure PVD5. Work and Resource Management screen showing the Application Close icon in green and the browser close icon in red (partial screen capture only- the actual Planview screen displays additional information).

					Browser C	lose		×
= clo	se							
						2	. >	<
					Applic	cation	Clo	ose
7	- Schedule	🔻 No Filters 🔻	Enter text t	o filter grid	© •	×	$\downarrow$	•
lag	Milestone Type	Predecessors	Successors	Constraint Type	Constraint Date	Progre	ess Re	qui

Figure PVD6. Financial Planning Details screen showing the Close & Complete icon in green, the Application Close icon in yellow, and the browser close icon in red (partial screen capture only- the actual Planview screen displays additional information).

			Browser C	Close
			é	2 × *
		Version Actuals/For	Close ecast Versio	& Complete n (forecast) ▼
1	Enter text to filter	grid	© *	≁ ± •
	12	-		1

- 1.7. In Planview the grouped icons to the right of some data selection fields (1) launch (from left to right) text search functionality, a list of bookmarks and recent selections from which to choose, and the data picker functionality. The data picker displays a directory of personnel and/or assignable resources with the appropriate Planview role assignments in cascading dropdown list form. See figure PVD7.
- 1.8. The down caret often mentioned in this document is the downward-facing chevron (2) next to some Planview data selection fields. When clicked these carets reveal drop-down lists of selectable options. See figure PVD7.
- 1.9. The Planview screen shots with hollow yellow arrows (3) have been horizontally and/or vertically compressed in the screen captures to aid readability. The actual screens are either wider, taller, or both. See figure PVD7.

Figure PVD7. Data picker icons, down caret, and screen alteration arrow (horizontally compressed screen capture. The actual Planview screen is wider).

New Work					
					Continue Close
Basic Info				Required Fields	
Function	Test Data (L4)		Q 🛛 🖂	1	
Project Name	Test Project				l
Work ID	1000473				> 3
Internal Priority	Low 🔽 2				-
Project Category	Study / Pilot / POC	☑ 2			
Attributes					Required Fields
Pro	oposal Manager Lead	Bill Walton		Q 🖉 📼	1
					Continue Close

- 1.10. In data entry and selection dialog boxes, required data entry fields are indicated by a red vertical line (rule line) next to them. Another graphical reminder of this appears at the upper right of many screens where data entry fields in which required information must be entered appear. See figure PV1 (above).
- 1.11. Data entry dialog boxes that are required data entry fields with no known values must be populated with a (zero [0]).
- Do not enter decimals in currency data entry dialog boxes. Round up instead.
   Example: Round \$43.51 up to \$44.
- 1.13. All currency values must be converted to US Dollar values in currency data entry dialog boxes. The currency converter approved for use by Huntsman Corporation LLC personnel is located at <u>https://www.xe.com/</u>. It can be accessed from the Tools menu on <u>The Hub</u>.
- 1.14. Enter only whole numbers in currency data entry dialog boxes. Commas are not necessary when entering currency amounts- Planview will add them.
- 1.15. For data entry fields populated with dates, the calendar launch icon next to the data selection field can be used to open the calendar-based date selection tool to select dates. It is also possible to enter dates in these fields manually. If dates are entered without zeroes in front of single digit days or months Planview will correct them. Two-digit years will also be corrected to four-digit years.

- 1.16. If a workflow process step is left incomplete or data is entered erroneously or left unsaved the error triggers both an open Planview action item and an email message to the user.
- 1.17. All project documentation is to be uploaded to and maintained in the Hub Space for the project.
- 1.18. This document lists the Planview procedures in sequential order. It is important to understand that at several points during the Demand Intake workflow delays of several days, weeks, and even several months can occur between some of the workflow procedures- especially those later in the workflow.
- 1.19. A comprehensive glossary is available <u>here</u>.

## Back to top

# 2. Document Conventions

## 2.1. <u>This is a Section (or)</u> Sub-section <u>name</u>

## 2.2. This is a data field (or) screen name

- 2.3. Click here when in a box
- 2.4. (Insert the variable [or] response here)
- 2.5. NOTE: Notes look like this.

# 3. Get Started

- 3.1. Open and login to Planview.
- 3.2. The **My Overview** screen is displayed.
- 3.3. Click on the **Resources** hyperlink in the menu bar at the top of the page. See figure PNP1.

Figure PNP1. Resources hyperlink in Menu Bar.

∇ Planvi Enter	iew prise One	My Overview	Work	Resources	more▼			
O Active Lifecy	vcle Steps	O Favorite Projects	My	O Active Change Requests	O My Active Issues	O My Active Risk	s MY24 - My Assignments	more
ly <mark>Activ</mark> e	Lifecycle	Steps						
Status	Lifecycle	Step	Entity	Туре	View Lifecy	le	User Responsible	Lifecycle Role
No data to d	display							
RPM Tile:	T105 - My F	Nanview > Active Li	ecycle S	teps				

3.4. The **Resources Menu** is displayed. See figure PNP2.

#### Figure PNP2. Resources Menu.

Resources Menu		
Show	Select Recently Visited Portfolios	
Resource Portfolios	You do not have access to any portfolios. Click + New to create one.	
+ New Resource Portfolio		
	See All Resource Portfolios (0)	

3.5. Click +New Resource Portfolio in the left **Show** column to open the **New Resource Portfolio** screen. See figure PNP3.

Figure PNP3. +New Resource Portfolio in the Work Menu.

Resources Menu		
Show	Select Recently Visited Portfolios   Action	
Resource Portfolios	You do not have access to any portfolios. Click + New to create one.	
+ New Resource Portfolio		
	See All Resource Portfolios (0)	

## 3.6. The **New Resource Portfolio** screen is displayed. See figure PNP4.

Figure PNP4. New Resource Portfolio screen (modified horizontally compressed screen capture- the actual Planview screen is wider).

V Planview Enterprise One My Overview	Work Resources more v	+New Q Search
← New Resource Portfolio		
New Resource Portfolio		Required Fields
Resources		~
Name	New Portfolio	
Exclude Resources whose Employment End Date has passed		
Description		
Advanced Options		
Click optional attribute categories you want portfolio to include.	Country Location Providing Operatization Resource Role Resource Types Yender	
		Save Cancel

### Back to Top

# 4. <u>New Resource Portfolio</u>

4.1. Click the Select Resources icon next to the **Resources** data selection box to launch the **Hierarchy** data picker screen. See figure PNP5.

Figure PNP5. Select Resources icon (partial screen capture only).

V Planview Enterprise One My Overv	riew Work Resources more▼
$\leftarrow ~~ {\rm New  Resource  Portfolio}$	
New Resource Portfolio	
Resourc	.es
Nar	ne New Portfolio
Exclude Resources who Employment End Date has pass	ed
Descripti	on //

4.2. The **Hierarchy** data picker screen is displayed. See figure PNP6 and PNP7.

Figure PNP6. Hierarchy data picker screen.

🔞 Data Picker - Google Chrome		
https://huntsmanit.pvcloud.com/planview/DataPicker/DataPicker.aspx?popu	up=1&back=close	୍
		×
Hierarchy Search Bookmarks Recently Selected	Selections	
- Top	Jump To A B C D E F G H I J K L M N O P Q R S	T U V W X Y Z 0-9
Enterprise: Huntsman	Description ↓	
Division: Archive Resource Area	Archive Resource Area	🚠 🗔
- Division: Corporate	🗆 📕 🚞 Corporate	÷. 🖪
<ul> <li>Function: IT</li> <li>Tower: Business Relations &amp; Application Management</li> <li>Tower: Governance &amp; Controls</li> <li>Tower: Manufacturing &amp; Engineering COE</li> <li>Tower: Service &amp; Operations</li> </ul>		«< < > >>
		Cancel OK

### NOTE: The options listed in the Hierarchy data picker screen will differ based on user

#### permissions.

Figure PNP7. Hierarchy data picker data screen (partial screen capture of right data column only).

	×
Jump To	A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0-9
Description 1	
🗆 🔲 🖿 Application Development	赤鸣
🗆 🔲 🖿 BRAM	
🔲 🔲 🖿 Business Intelligence	
🗏 🔲 🛅 Corporate Functions	
🛛 🔲 🚞 Hire to Retire	
🛛 🔲 🚞 Order to Cash	
🗏 🔲 🎽 Plan to Produce - Maintain to Settle	
🛛 🔲 🚞 Procure to Pay	
SAP Maintenance and Configuration	
	(< < > >))
	Cancel OK

- 4.3. Click the check box next to each **Team** to add the selected **Team** to the Portfolio.
- 4.4. When the desired **Teams** are selected click OK in the lower right corner of the **Hierarchy** data picker screen. See figure PNP9.

Figure PNP9. Teams selected and OK button highlighted.

	the E
	A E
	A D
	÷ E
<< <	> >>

4.5. After clicking OK in the **Hierarchy** data picker screen the selected **Teams** appear in the **Resources** data block on the **New Resource Portfolio** screen. See figure PNP10.

Cancel

Figure PNP10. Selected team members now listed in Resources (partial screen capture only).

Resources	Application Development BRAM Business Intelligence Corporate Functions SAP Maintenance and Configuration	
Name		
ces whose as passed		
escription		

4.6. Click in the **Name** data entry field to enter (the name of the Resource Portfolio).

NOTE: The name of the Resource Portfolio should include reference to the project for which it is being created.

- 4.7. Click the checkbox next to Exclude Resources whose Employment End Date has passed to apply that parameter to the Portfolio.
- 4.8. Click in the **Description** data entry field to enter (<u>a description of the New Resource</u> <u>Portfolio</u>).

NOTE: The description entered here should include the name of the project for which the portfolio is being created. See figure PNP11.

Figure PNP11. Completed New Resource Portfolio section (partial screen capture only).

>		
Resources	Application Development BRAM Business Intelligence Corporate Functions SAP Maintenance and Configuration	9
Name	Sample Portfolio- Procedural Documentation Only	
rces whose has passed		
Description	This portfolio was created to capture the procedure used to create a Resource Portfolio. It is not real- it is Memorex.	

### Back to Top

# 5. Advanced Options

NOTE: Advanced Options enable the user to apply selection parameters to the Portfolio allowing narrowed down resource selections. See figure PNP12.

Figure PNP12. Advanced Options (partial screen shot only).

Advanced Options		
Click optional attribute categories you	Country	
want portfolio to include.	Location	
	Providing Organization	
	Region	
	Resource Role	
	Resource Types	
	Vendor	

## 5.1. Country

- 5.1.1. Click the **Country** advanced option hyperlink in the **Advanced Options** data block to open the Hierarchy data picker screen listing attribute options for a **Country** restriction.
- 5.1.2. Click the checkbox to the left of each **Country** to be included in the Portfolio.
- 5.1.3. When Country selections are complete click OK in the lower right corner of
  Hierarchy data picker screen the screen to save the Country attribute selections.
  See figure PNP13.

Figure PNP13. Completed Country selections with OK highlighted.

Jump To		A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0-9
	Description 1	
	Argentina	
	Australia	
	Belgium	
	Brazil	
	China	
	Colombia	
	Czech Republic	
	Germany	ri D
	Guatemala	
	Hungary	
	India	
	Indonesia	
	Malaysia	
	Mexico	- <b>1</b>
	Netherlands	
	Singapore	
	Switzerland	
		<< > >>
		Cancel OK

5.1.4. The selected **Country** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP14.

NOTE: As advanced option attributes are added the data block in which they are displayed will require scrolling to view all attributes selected.

Figure PNP14. Selected countries in the data block to the right of the advanced options hyperlinks (partial screen capture only).

lick optional attribute categories you	Country	Country	
want portfolio to include.	Location Providing Organization Region Resource Role Resource Types Yendor	<ul> <li>Australia</li> <li>China</li> <li>Indonesia</li> </ul>	<ul> <li>Malaysia</li> <li>Singapore</li> </ul>

### 5.2. Location

- 5.2.1. Click the **Location** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Location** restriction.
- 5.2.2. Click the checkbox to the left of each **Location** to be included in the Portfolio.
- 5.2.3. When **Location** selections are complete click OK in the lower right corner of the **Hierarchy** data picker screen to save the **Location** attribute selections. See figure PNP13 (above) for an example.
- 5.2.4. The selected **Location** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP15.

Figure PNP15. Selected locations in the data block to the right of the advanced options hyperlinks (partial screen capture only).

Advanced Options				
Click optional attribute categories you want portfolio to include.	Country Location Providing Organization Region Resource Role	Country • Australia • China • Indonesia	<ul><li>Malaysia</li><li>Singapore</li></ul>	
	Resource Topes Vendor	Location • Kuala Lumpur • Kuan Yin	• Qingdao • Singapore	

### 5.3. Providing Organization

- 5.3.1. Click the **Providing Organization** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Providing Organization** restriction.
- 5.3.2. Click the checkbox to the left of each **Providing Organization** to be included in the Portfolio.
- 5.3.3. When **Providing Organization** selections are complete click OK in the lower right corner of the **Hierarchy** data picker screen to save the **Providing Organization** attribute selections. See figure PNP13 (above) for an example.
- 5.3.4. The selected **Providing Organization** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP16.

Figure PNP16. Selected providing organizations in the data block to the right of the advanced options hyperlinks (partial screen capture only).

Advanced Options				
Click optional attribute categories you want portfolio to include.	Country Location Providing Organization Region Resource Role	China     Indonesia     Location     Kuala Lumpur     Kuan Yin	<ul> <li>Singapore</li> <li>Qingdao</li> <li>Singapore</li> </ul>	•
	Resource Types Vendor	Providing Organization HR IT	Product Development	*

## 5.4. Region

- 5.4.1. Click the **Region** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Region** restriction.
- 5.4.2. Click the checkbox to the left of each **Region** to be included in the Portfolio.
- 5.4.3. When **Region** selections are complete click OK in the lower right corner of the **Hierarchy** data picker screen to save the **Region** attribute selections. See figure PNP13 (above) for an example.
- 5.4.4. The selected **Region** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP17.

Figure PNP17. Selected regions in the data block to the right of the advanced options hyperlinks (partial screen capture only).

Click optional attribute categories you	Country	Location		
want portfolio to include.	Location	Kuala Lumpur	Qingdao	
	Providing Organization	Kuan Yin	Singapore	
	Region	Providing Organization		
	Resource Role	• HR	Product Development	
	Resource Types	• 17		
	Vendor	Region		
		Americas	APAC	

### 5.5. Resource Role

- 5.5.1. Click the **Resource Role** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Resource Role** restriction.
- 5.5.2. Click the checkbox to the left of each **Resource Role** to be included in the Portfolio.
- 5.5.3. When Resource Role selections are complete click OK in the lower right corner of the Hierarchy data picker screen to save the Resource Role attribute selections.
  See figure PNP13 (above) for an example.
- 5.5.4. The selected **Resource Role** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP18.

Figure PNP18. Selected resource roles in the data block to the right of the advanced options hyperlinks (partial screen capture only).

Advanced Options				
Click optional attribute categories you want portfolio to include.	Country	• HR • IT	Product Development	•
	Providing Organization	Region		
	Region	Americas	APAC	
	Resource Role Resource Types	Resource Role		
	Vendor	Architect	Engineer	
		<ul> <li>Business Analyst</li> </ul>	<ul> <li>Project Manager</li> </ul>	
		Developer		*

### 5.6. Resource Types

- 5.6.1. Click the **Resource Types** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Resource Types** restriction.
- 5.6.2. Click the checkbox to the left of each **Resource Types** to be included in the Portfolio.
- 5.6.3. When **Resource Types** selections are complete click OK in the lower right corner of the **Hierarchy** data picker screen to save the **Resource Types** attribute selections. See figure PNP13 (above) for an example.
- 5.6.4. The selected **Resource Types** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP19.

Figure PNP19. Selected resource types in the data block to the right of the advanced options hyperlinks (partial screen capture only).

Click optional attribute categories you want portfolio to include.	Country Location	Americas	APAC	•
	Providing Organization	Resource Role		
	Region Resource Role Resource Types	Architect     Business Analyst     Developer	Engineer     Project Manager	
	Vendor	Resource Types <ul> <li>Associate (Employee)</li> </ul>	Contingent Worker	Ŧ

### 5.7. Vendor

- 5.7.1. Click the **Vendor** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Vendor** restriction.
- 5.7.2. Click the checkbox to the left of each **Vendor** to be included in the Portfolio.
- 5.7.3. When Vendor selections are complete click OK in the lower right corner of the Hierarchy data picker screen to save the Vendor attribute selections. See figure PNP13 (above) for an example.

# 5.7.4. The selected **Vendor** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP20.

Figure PNP20. Selected vendors in the data block to the right of the advanced options hyperlinks (partial screen capture only).

Click optional attribute categories you want portfolio to include.	Country Location	Business Analyst     Project Manager     Developer		
	Region Resource Role	Associate (Employee) Vendor	• Contingent Worker	
	Resource Types Vendor	Apex Systems     Icon Technology     Insight Global	TekSystems     The Bayard Partnership	

- 5.7.5. Verify all data entered and selected is complete and correct.
- 5.7.6. After verification click Save in the lower right corner of the **New Resource Portfolio**

### screen to save the **New Resource Portfolio**. See figure PNP21.

Figure PNP21. Completed New Resource Portfolio with Save highlighted (modified horizontally compressed screen capture- the actual Planview screen is wider).

w Resource Portfolio				Required
Resources	Beau Wheeless Carina Schlarmann Krish Santhanagopalan Nicole Van Laer Patricia Andry Rubens Filho	▲ E		
Name	Sample Resource Portfolio for Documentation			
Exclude Resources whose Employment End Date has passed	<b>v</b>			
Description	This is a sample resource portfolio to be used only for writing procedural documentation. Associated with Sample Resource Portfolio for Documentation.			
dvanced Options				
Click optional attribute categories you want portfolio to include.	Country. Location Providing Organization Resource Role Resource Types Vendor	Country Australia China Indonesia Location Kuala Lumpur Kuan Yin	<ul> <li>Malaysia</li> <li>Singapore</li> <li>Qingdao</li> <li>Singapore</li> </ul>	

# 5.7.7. After Save is clicked in the New Work Portfolio screen the Resource Info – Basic version of the Portfolio View for the selected Portfolio is displayed.

NOTE: The resource data displayed on the **Portfolio View** screen is determined by the parameters previously selected in the **New Resource Portfolio** screen. See figure PNP22. Figure PNP22. Portfolio View screen (partial screen capture- actual screen scrolls right and down.

$\nabla$	7 Plan Entr	nview erprise One	My Overview	Work Resources	more							+ New
÷	<del>.</del>	☆ :	Resource Portfolio Sample Portfol	io- Documentation (	Only Portfolio \	/iew						
P	13 ortfolio	32 Manager	RESO1 - Portfolio Analysis	RES03 - Supply and Demand	RES04 - Effort Analysis	Requirements to Fil	O Assignment: Requested	O Overloaded Resources	132 Free Capacity Week	O this Pending Assignme	nts more	<u>]</u>
	Resou	irce Info - Ba	ic 🔻									
		Name			Resource Start Date	Resource Finish Date	Resource Calend	Organizational Resourc	Resource Quantit	Timesheet Hours Per W	User Name	User Email
:		AK Aditi	Kokil				Standard	Business Intelligence-	1.00	40.00		
:		AB Afrin	Baig				Standard	SAP Maintenance and	1.00	40.00		
:		AM Afza	n Mohd Salud				Standard	SAP Maintenance anc	1.00	40.00		
:		AG Agu	Given Yap				Standard	Application Developm	1.00	40.00		
:		AK Akst	ay Kumar				Standard	BRAM-Business Analy	1.00	40.00		
:		AV Alair	Van den Broeck				Standard	SAP Maintenance and	1.00	40.00		
:		AR Alala	ine Rabe Quintans				Standard	SAP Maintenance and	1.00	40.00		
:		AR Alex	andre Rodrigues				Standard	SAP Maintenance and	1.00	40.00		
:		AD Ame	ya Dandekar				Standard	Business Intelligence-	1.00	40.00		
:		AK Anul	hav Kandpal				Standard	BRAM-Business Analy	1.00	40.00		
:		AS Anu	hiah S Kujalan				Standard	SAP Maintenance and	1.00	40.00		

### Back to Top

## 6. Portfolio View

### 6.1. Resource View

NOTE: Two view options are available in the Resource View screen: **Resource Info – Basic** and **RPM – Resource Capacity and Utilization**. The Resource View screen defaults to **Resource Info – Basic.** 

NOTE: Several tiles appear in the Portfolio View menu. The majority of these tiles are not currently utilized.

NOTE: Resources to be added or deleted are owned by the Proposal Manager Lead but are actually executed by the PMO due to Planview permission schema.

6.1.1. Click on the Action menul (the vertical ellipses or three dots) next to any listed

resource to reveal the **Action menu** for that resource. See figure PNP23.

Figure PNP23. Action menu icon.

÷	-	☆ <mark>:</mark>	Resource Portfolio Sample Portfoli	o- Documentation C	View Only Portfolio V	/iew
Pc	13 ortfolio	32 Manager	RESO1 - Portfolio Analysis	RES03 - Supply and Demand	RESO4 - Effort Analysis	Requirements to Fill
	Resou	rce Info - Ba	sic v			
1		Name			Resource Start Date	Resource Finish Date
:	穷	AK Adit	i Kokil			
3	32	AB Afrir	n Baig			
÷	À	AM Afza	n Mohd Salud			
	Reso	urce View				
=	Assig	nments Gra	ph			
		AT Aidi	n van oen broeck			
:	$\Delta$	AR Alal	aine Rabe Quintans			
:	×	AR Alex	andre Rodrigues			

# 6.1.2. Click Resource View to open the **Resource View** screen for that resource. See figure PNP24.

Figure PNP24. Action menu and Resource View selection (partial screen capture only).

$\nabla$	Plan Ente	wiew arprise One	My Overview	Work Resources	more	
÷	-	☆ :	Resource Portfolio Sample Portfoli	io- Documentation C	View Only Portfolio V	/iew
Po	13 ortfolio	32 Manager	RESO1 - Portfolio Analysis	RES03 - Supply and Demand	RESO4 - Effort Analysis	Requirements to Fill
	Resou	rce Info - Bas	ic v			
		Name			Resource Start Date	Resource Finish Date
:	Å	AK Aditi	Kokil			
:	\$	AB Afrin	Baig			
:	-57	AM Afzai	n Mohd Salud			
	Reso	urce View				
1	Assig	inments Grap	h			
	1.64	Alam	van den broeck			
:	14	AR Alala	ine Rabe Quintans			
	1	AR Alexa	andre Rodrigues			

# 6.1.3. The **Resource View** screen for the selected resource is displayed. See figures PNP25 and PNP26.

Figure PNP25. Resource View screen (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).

ources/viewres.asp?rc=	=10439&popup=1&back=cl	osereload			
					×
	Resource Image		[	Upload Image	
	Info			Update	
	Calendar:	Standard			
	Quantity:	1			
ement	Timesheet Hours Per Week:	40			
	Reimburse Currency:				
	Employment Dates			Update	
	Start:				
	End:				
	Commants				
	Comments				
		Eff	ective Date 1/7/2019		History
					Update
Associate (Employee)					
Primary selection	)				
💙 1. Developer			Default		
🕎 Santo Amaro					
Americas					
Brazil					
119055					
BR51301059					
	ement ement ement Massociate (Employee) Massociate (Employee) M	iources/viewres.asp?rc=10439&popup=1&back=cle Resource Image Info Calendar: Calendar: Cuantity: Timesheet Hours Per Week: Reimburse Currency: Employment Dates Start: Comments Comments Santo Amaro Santo Amaro Santo Amaro Santo Amaro Resource Image Mericas Brazil 19055 BR51301059	ement	oources/viewres.asp?rc=10439&tpopup=1&back=closereload           Resource Image         [           info         [           Calendar:         Standard           Quantity:         1           Timesheet Hours Per Week:         40           Reimburse Currency:         [           Employment Dates         [           [         [ <tr< td=""><td>ources/viewres.asp?rc=104398/popup=18/back=closereload</td></tr<>	ources/viewres.asp?rc=104398/popup=18/back=closereload

Figure PNP26. Resource View upper data blocks (partial screen capture only).

https://huntsmanit.pvcloud.com/planview/AdminResources/viewres	asp?rc=10439&popup=1&back=cl	osereload	
Afzan Mohd Salud Resource View			
Resource Structure	Resource Image		Upload Imag
Enterprise: Huntsman	Info		Updat
Division: Corporate Function: IT	Calendar:	Standard	
Tower: Business Relations & Application Management	Quantity:	1	
Sub-Tower: Global Business Process and Application Management	Timesheet Hours Per Week:	40	
Team: SAP Maintenance and Configuration	Reimburse Currency:		
Associated User	Employment Dates		Updat
NA	Start:		Linderer
Organizational Resource	End:		
SAP Maintenance and Configuration-Developer	Comments		

Figure PNP27. Resource View- Resource Attributes section (partial modified horizontally compressed screen capture- the actual Planview screen is wider.

Resource Attributes		Effective Date 12/5/2018	Apply	History
Attributes				Update
Resource Types	🕎 Associate (Employee)			
Resource Role	🔯 🖌 (Primary selection)			
	💜 1. Developer	Default		
Location	🕎 Santo Amaro			
Vendor	<b>2</b>		>	
Region	Americas			
Country	Brazil			
Associate (Employee) ID	119055			
cc	BR51301059			

NOTE: The Resource Structure, Associated User, and Organizational Resource data blocks are prefilled and not editable in this dialog box.

### 6.2. Resource Image

6.2.1. Click Upload Image next to **Resource Image** to associate a picture with the resource. See figure PNP28.

Figure PNP28. Upload Image link (partial screen capture only).

Resource Image	Upload Image	
Info	Update	
Calendar:	Standard	
Quantity:	1	
Timesheet Hours Per Week:	40	
Reimburse Currency:		
Employment Dates		Update
Start:		
End:		
Comments		

### 6.2.2. The **Planview Upload Image** dialog dox is displayed.

6.2.3. Click Choose file in the **Planview Upload Image** dialog box. See figure PNP29.

Figure PNP29. Planview Upload Image dialog box with Choose File highlighted (partial screen capture of this dialog box only)

hoose File	No file chosen	Upload a JPEG image that has one of the following file extensions: .jpg, .jpeg, .jpe, or .jfif.

## 6.2.4. The **Windows Open** dialog box is displayed. See figure PNP30.

Figure PNP30. Windows Open dialog box (modified vertically compressed screen capture- the actual Windows Open dialog defaults to a taller user interface).

Open		X
🔾 🗸 - 📕 🕨 Libraries	Pictures      My Pictures      Saved Pictures	- + Search Saved Pictures
Organize 🔻 New fold	er	··· · · · · · · · · · · · · · · · · ·
🔶 Favorites	Pictures library Saved Pictures	Arrange by: Folder 🔻
Downloads Recent Places Desktop	1142959002 4847390482 8135966153 DSC00244,J	
Libraries	391910'lbd 13915'lbd 58125'lbd 56	()
🤰 My Videos 🚽		N N
File n	ame:	Custom Files     Open     Cancel

6.2.5. Select the (image file to be uploaded).

NOTE: Only JPEG files (.jpg, .jpeg, .jpe, or jfif) file extensions can be uploaded to Planview.

- 6.2.6. After selecting the file from the local PC, double click the image file icon to upload the file to Planview.
- 6.2.7. The picture is displayed in the **Planview Upload Image** dialog box. See figure PNP31.

Figure PNP31. Chosen picture displayed in Planview Upload Image dialog box for manipulation (partial screen capture of this dialog box only).



- 6.2.8. Place the cursor over the image and drag the corners to crop it or change its formatting.
- 6.2.9. When manipulation of the image is complete, click Save in the Planview Upload Image dialog box to upload the image. See figure PNP32.

Figure PNP32. Planview Upload Image dialog box with Save highlighted (partial screen capture of this dialog box only).



6.2.10. After Save is clicked in the Planview **Upload Image** dialog box the uploaded image appears in the **Resource Image** data block. See figure PNP33.

Figure PNP33. Resource Image dialog box (partial screen capture only).

Resource Image		Upload Image	(remove)
0/			
Info			Update
Calendar:	Standard		
Quantity:	1		
Timesheet Hours Per Week:	40		
Reimburse Currency:			
Employment Dates			Update
Start:			
End:			
Comments			

# 6.3. Info

6.3.1. Click Update next to Info in the Info data block. See figure PNP34.

Figure34. Update highlighted in the Info data block (partial screen capture only).

Resource Image		Upload Image
Info		Update
Calendar:	Standard	
Quantity:	1	
Timesheet Hours Per Week:	40	
Reimburse Currency:		
Employment Dates		Update
Start:		
End:		
Comments		

### 6.3.2. The **Update Resource** dialog box is displayed. See figure PNP35.

Figure PNP35. Update Resource dialog box (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).

Update Resource	- Planview Enterp	ise One - Portfolio and Resource Managen	nent - Go	oogle Chroi	ne		X
https://hunts	manit.pvcloud.c	om/planview/AdminResources/EditRe	es.asp?r	res=10444	ŧ		
							4
자 Resource Alain Va	n <mark>den Broeck</mark>	View Update Resource					
						Save C	ancel
Info						Required	Fields
		Calendar:	Standa	ard 🔻			
		Quantity:	1				
		Timesheet Hours Per Week:	40				
		Reimburse Currency:		-j			
Employment Dates							
		Start:					
		End:		10	Substitute Resources		
						Save C	ancel

6.3.3. Select a Calendar parameter by clicking the down caret next to the Calendar data selection field under Info and clicking (<u>the calendar parameter used for the resource</u>) from the options listed in the dropdown menu to select it. See figure PNP36.

NOTE:

ht:	tps://huntsmanit.pvclou	d.com/planview/AdminResources/EditRe	es.asp?res=	=10439	)
☆	Resource Afzan Mohd Salud	<sup>View</sup> Update Resource			
nfo		Calandar	Standard		
		Quantity:	Absolute Standard		
		Timesheet Hours Per Week: Reimburse Currency:	40 •		
mployr	nent Dates				
		Start:			
		End:			Substitute Resource

Figure PNP36. Calendar selection options (partial screen capture only).

- 6.3.4. Click in the Quantity data entry field to change the default setting if necessary.
- 6.3.5. Click in the Timesheet Hours Per Week data entry field to change the default setting if necessary.
- 6.3.6. Select a Reimburse Currency parameter by clicking the down caret next to the Reimburse Currency data selection field and clicking (<u>the currency used to</u> <u>reimburse the resource</u>) from the options listed in the dropdown menu to select it. See figure PNP37.

Figure PNP37. Reimburse Currency selection options (partial screen capture only).

htt	tps://huntsmanit.pvcloud.c	om/planview/AdminResources/EditRe	es.asp?res=1	.0444	ł
☆	Resource Alain Van den Broeck	View Update Resource			
nfo					
		Calendar:	Standard <b>v</b>		
		Quantity:	1		
		Timesheet Hours Per Week:	40		
		Reimburse Currency:			
			EUR		
mployn	nent Dates		USD		
		Start:			
		End:		Te	Substitute Resource

## 6.4. Employment Dates

- 6.4.1. Click the Calendar launch icon next to the **Employment Dates Start:** data selection field to select a start date for the resource.
- 6.4.2. Click the Calendar launch icon next to the **Employment Dates End:** data selection field to select an end date for the resource. See figure PNP38.

Figure PNP38. Calendar date selection tool open for Employment Start Date (partial screen capture only).

M ht	tps://huntsmanit.pvcloud.c	om/planview/AdminResources/EditRe	s.asp	(res=)	1044	4			
☆	Resource Alain Van den Broeck	<sup>View</sup> Update Resource							
ifo									
		Calendar:	Stand	dard 🔻					
		Quantity:	1						
		Timesheet Hours Per Week:	40						
		Reimburse Currency:		•					
mploy	ment Dates								
		Start:	1			1			
		End:	O January 2019				C		
			Su	Мо	Tu	We	Th	Fr	Se
					- 1	2	З	4	
			6	7	1 8	2 9	3 10	4	1
			6	7	1 8 15	2 9 16	3 10 17	4 11 18	1
			6 13 20	7 14 21	1 8 15 22	2 9 16 23	3 10 17 24	4 11 18 25	

# 6.4.3. Click the Comments hyperlink to enter any comments for the changes being made. See figure PNP39.

Figure PNP39. Comments hyperlink highlighted (partial screen capture only).

Resource Image		Upload Image
Info		Update
Calendar: Quantity:	Standard	
Timesheet Hours Per Week:	40	
Reimburse Currency:		
Employment Dates		Update
Start:		
End:		
Comments		

# 6.4.4. The **Resource Comments for Resource (Name)** dialog box is displayed. See figure PNP40.

Figure PNP40. Resource Comments for Resource (Name) dialog box (partial screen capture only).

https://huntsmanit.pvcloud.com/planviev	v/AdminResources/EditComments.asp?res=1043
Resource Comments for Resource: Afzan Moh	d Salud
Existing comments	
Append to comments	

6.4.5. Click in the Append to comments dialog box to enter the comments.

NOTE: Any previously entered comments will appear in the Existing Comments data field.

6.4.6. When comments are complete click Save on the right side of the Resource

Comments for Resource (Name) dialog box. See figure PNP41.

Figure PNP41. Save highlighted in the Resource Comments for Resource (Name) dialog box (partial screen capture only).

Comments - Planview Enterprise One - Portfolio and Resource Management - Google Chrome	
https://huntsmanit.pvcloud.com/planview/AdminResources/EditComments.asp?res=10439	
	$\leftarrow$
Resource Comments for Resource: Afzan Mohd Salud	
Existing comments	
Append to comments	
	Save Cancel

- 6.4.7. Verify all data entered and selected is correct and complete.
- 6.4.8. After verification click <u>Save</u> on the right side of the **Update Resource** dialog box.

## See figure PNP42.

NOTE: Either of the two (2) Save buttons in the **Update Resource** dialog box can be clicked.

### See figure PNP42.

Figure PNP42. Save buttons in the Update Resource dialog box (modified horizontally compressed screen capturethe actual Planview screen is wider and slightly taller).

Updat	te Resource - Planview Enterpr	ise One - Portfolio and Resource Managen	nent - Google	Chror	ne	
A htt	ps://huntsmanit.pvcloud.c	om/planview/AdminResources/EditRe	es.asp?res=1	0444	ł	
						÷
☆	<sub>Resource</sub> Alain Van den Broeck	<sup>View</sup> Update Resource			>	
						Save Cancel
nfo						Required Fields
		Calendar:	Standard V			
		Quantity:	1			
		Timesheet Hours Per Week:	40			
		Reimburse Currency:	<b>.</b>			
	Deter.					
Employn	nent Dates			1000		
		Start:				
		End:		P	Substitute Resources	
						Save Cancel

### 6.5. Resource Attributes

NOTE: The Resource Attribute parameters are critically important for both project tracking and system maintenance. If at any time during the project lifecycle the status of Resources assigned to the Project change those changes must be reflected here as soon as possible.

6.5.1. Click the Calendar launch icon next to Effective Date in the Resource Attributes data block to select an (Effective Date for any changes being made) to the Resource Attributes. See figure PNP43.

Figure PNP43. Effective Date calendar date selection tool (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).

Resource View - Google Chrome											
https://huntsmanit.pvcloud.com/planview/Adminited in the second secon	esources/viewres.asp?	rc=10439&popup=1&back=cl	osereload								
자 Resource View Afzan Mohd Salud Resource View											
esource Structure		Resource Image					Upload	i Imago			
Interprise: Huntsman		Info						Update	•		
Division: Corporate		Calendar:	Standard								
Tower: Business Relations & Application Management		Quantity:	1								
Sub-Tower: Global Business Process and Application Man	agement	Timesheet Hours Per Week:	40								
ream: SAP Maintenance and Configuration		Reimburse Currency:									
ssociated User		Employment Dates						Update	2		
A		Start					01				
Organizational Resource		End:									
SAP Maintenance and Configuration-Developer		Commente						_	-	-	
		Comments								-	
Resource Attributes				Effective Date	1/7/2019				App	ly.	Н
∃ Attributes					0	Ja	nuary	2019		0	Upo
Resource Type	s 🔯 Associate (Employ	ce)			Su I	no Tu	We	Th	Fr	Sa	
Resource Ro	e 🔯 🖌 (Primary select	ion)					1 2	3	4	5	
	🛩 1. Developer			Default	6	7 1	8 9 5 16	10	11	12	
Locatio	n 👿 Santo Amaro				20	21 2	2 23	24	25	26	
Vend	or 👿				27	28 2	9 30	31			
Regio	n Americas										
Count	y Brazil										
Associate (Employee)	D 119055										
c	C BR51301059										

- 6.5.2. After the Effective Date has been selected in the Calendar selection tool click the Apply hyperlink next to the Effective Date data selection field to apply the Effective Date change.
- 6.5.3. Click Update (under History) on the extreme right side of the **Resource Attributes** data block. See figure PNP44.

Figure PNP44. Update highlighted in the Resource Attributes data section (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).

Resource View - Google Chrome						
https://huntsmanit.pvcloud.com/planview/AdminRes	ources/viewres.asp?rc=	=10439&popup=1&back=cl	osereload			
						×
Afzan Mohd Salud Resource View						
Resource Structure		Resource Image			Upload Image	
Enterprise: Huntsman		Info			Update	
Division: Corporate		Calendar:	Standard			
Tower: Business Relations & Application Management		Quantity:	1			
Sub-Tower: Global Business Process and Application Manag	ement	Timesheet Hours Per Week:	40			
Team: SAP Maintenance and Configuration		Reimburse Currency:				
Associated User		Employment Dates			Update	
NA		Start:				
Organizational Resource		End:				
SAP Maintenance and Configuration-Developer		Comments				
Resource Attributes				Effective Date 1/7/2019		History
Attributes						Update
Resource Types	🔯 Associate (Employee)					
Resource Role	Primary selection	)				
	💙 1. Developer			Default		
Location	🕎 Santo Amaro					
Vendor						
Region	Americas					
Country	Brazil					
Associate (Employee) ID	119055					
сс	BR51301059					

# 6.5.4. The **Resource Detail Attributes for (Name)** dialog box is displayed. See figure PNP45.

Figure PNP45. Resource Detail Attributes for (Name) dialog box (modified horizontally compressed screen capturethe actual Planview screen is wider and slightly taller).

Resource Detail Attributes - Google Chrome	
https://huntsmanit.pvcloud.com/planview/Configure	edScreens/ConfiguredScreen.asp?sid=CfgDef\$Res&code=1Mohd%20Salud&popup=
	×
Resource Detail Attributes for Afzan Mohd Salud	
Effective Date 1/8/2019 Apply.	
Attributes	Required Fields
Resource Types	Associate (Employee) 🔻
Resource Role	Add Resource Role attribute
	✓ (Primary selection)
	● 1. Developer Default ▼ ¥
Location	Santo Amaro 🔻
Vendor	[Select]
Region	Americas 🔻
Country	Brazil 🔹
Associate (Employee) ID	119055
cc	BR51301059
	Save Cancel

6.5.5. Select a Resource Types parameter by clicking the down caret next to the Resource Types data selection field and clicking (<u>the appropriate resource type</u> parameter for the resource) from the options listed in the dropdown menu to select it. See figure PNP46.

Figure PNP46. Resource Types selection options (partial screen capture only).

https://huntsmanit.pvcl	oud.com/planview/Configure	edScreens/ConfiguredScreen.asp?s	id=CfgDef\$Res&code=
Resource Detail Attributes fo	or Afzan Mohd Salud		
Effective Date 1/8/2019			
Attributes			
	Resource Types	Associate (Employee) 🔻	
	Resource Role	Associate (Employee) Contingent Worker	
		(Primary selection)	
			<ol> <li>Develope</li> </ol>
	Location	Santo Amaro 🔻	
	Vendor	[Select]	
	Region	Americas 🔻	
	Country	Brazil 🔻	
	Associate (Employee) ID	119055	
	сс	BR51301059	

# 6.5.6. Click the Add Resource Role attribute hyperlink next to Resource Role to add a

second resource role (or) modify the displayed resource role.

6.5.7. The Resource Role Data Picker dialog box is displayed. See figure PNP47.

Figure PNP47. Resource Role data picker dialog box (modified horizontally compressed screen capture- the actual Planview screen is wider).

Data Picker -	Google Chrome	e							
https://hu	untsmanit.pvc	loud.com/plan	view/DataPicker/Datal	Picker.aspx?popup=18	back=close				
									>
Hierarchy	Search	Bookmarks	Recently Selected	Selections					
Top					*	Jump To		OPQRST	UVWXYZO
> Re	source Role(s)						Description 1		
							Architect		
							Business Analyst		
							Developer		
							Engineer		ata 🗉
							Project Manager		
							-	-	2
									Cancel OK

- 6.5.8. Click the check box to the immediate left of the desired additional (or) modified role.
- 6.5.9. When **Resource Roles** selections are complete, click OK in the lower right portion of the **Data Picker dialog box** to save the Resource Role information. See figure PNP48.

Figure PNP48. Resource Role data picker dialog box with checkbox and OK highlighted (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).

Data Picker -	Google Chrome	loud.com/plan	/iew/DataPicker/DataF	icker.aspx?popup=1&b	ack=close				
maposyria		ioudiconi, pian		internet property from					3
lierarchy	Search	Bookmarks	Recently Selected	Selections					
Тор					*	Jump To	5	OPQRST	UVWXYZ
<b>&gt;</b> Re	source Role(s)						Description 1		
							Architect		
							Business Analyst		
							Developer		
							Engineer		
							Project Manager		
									-
									Cancel

- 6.5.10. The Resource Role information appears in the **Resource Detail Attributes for** (name) dialog box.
- 6.5.11. Click the radio button next to the default **Resource Role** (if another Resource Role was added).
- 6.5.12. Click the red X next to (any listed role) to remove it from the list of Resource Roles. See figure PNP49.

Figure PNP49. Resource Role data block (partial screen capture only- modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).

Resource Detail Attributes - Google Chrome	
https://huntsmanit.pvcloud.com/planview/Configure	edScreens/ConfiguredScreen.asp?sid=CfgDef\$Res&code=1Mohd%20Salud&popup:
	×
Resource Detail Attributes for Afzan Mohd Salud	
Effective Date 1/8/2019 Apply.	
Attributes	Required Fields
Resource Types	Associate (Employee) V
Resource Role	Add Resource Role attribute
	✓ (Primary selection)
	● 1. Developer     Default
Location	Santo Amaro 🔻
Vendor	[Select]
Region	Americas 🔻
Country	Brazil 🔻
Associate (Employee) ID	119055
cc	BR51301059
	Save Cancel

6.5.13. Select a Location parameter by clicking the down caret next to the Location data selection field and clicking (<u>the location in which the resource works</u>) from the options listed in the dropdown menu to select it. See figures PNP50 and PNP51.
Figure PNP50. Location selection dropdown menu (partial screen capture only).

Resource Detail Attributes - Google Chrome	
https://huntsmanit.pvcloud.com/planview/Configure	edScreens/ConfiguredScreen.asp?sid=CfgDef\$Res&code=
Resource Datail Attributes for Martine LEDOLIX	
Resource Detail Attributes for Martine EEDOOX	
Effective Date 1/4/2019 Apply	
Attributes	
Resource Types	Associate (Employee) 🔻
Resource Role	Add Resource Role attribute
	V (Primary selection)
	<ul> <li>1. Developer</li> </ul>
Lacation	Viala Lumaur.
Vander	Ankleshwar
Vendor	Atoto Auburn Hills, Michigan
	Bangpoo
Region	Basel Bogota
Country	Buenos Aires
Associate (Employee) ID	Deer Park, Victoria
cc	Deggendorf East Lansing, Michigan
	Everberg
	Gandaria
	HATC, Texas Huntsman Campus, Shanohai
	Kuala Lumpur
	Kuan Yin Langweid
	Liberec

Figure PNP51. Location selection options (dropdown menu screen capture only).

Kuala Lumpur	Kuala Lumpur	•	Kuala Lumpur	•
Ankleshwar	Kuala Lumpur		Liberec	
Atoto	Kuan Yin		Llanelli	1000
Auburn Hills, Michigan	Langweid		Los Angeles, California	
Bangpoo	Liberec		Mahachai	
Basel	Llanelli		Matraville, New South Wales	
Bogota	Los Angeles, California		Mexico City_PU	
Buenos Aires	Mahachai		Monthey	
Conroe, Texas	Matraville, New South Wales		Mumbai	
Deer Park, Victoria	Mexico City_PU	100	Noida	
Deggendorf	Monthey		Osnabrueck	
East Lansing, Michigan	Mumbai		Panyu	
Everberg	Noida		Petfurdo	
Fraijanes	Osnabrueck		Port Neches, Texas	
Gandaria	Panyu		Pune	
HATC, Texas	Petfurdo		Qingdao	
Huntsman Campus, Shanghai	Port Neches, Texas		Rotterdam	
Kuala Lumpur	Pune		Santo Amaro	
Kuan Yin	Qingdao	1000	Singapore	
Langweid	Rotterdam		Taboao da Serra	
Liberec	Santo Amaro	-	The Woodlands, Texas	-

6.5.14. Select a Vendor parameter by clicking the down caret next to the Vendor data selection field and clicking (<u>the Vendor (or agency) for which the resource works</u>) from the options listed in the dropdown menu to select it. See figure PNP52.

NOTE: The Vendor parameter only applies to contingent workers (not Huntsman Associates).

NOTE: Additions or deletions of vendor data can be done via PMO.

Figure PNP52. Vendor selection options (partial screen capture only).

https://huntsmanit.pvc	loud.com/planview/Configure	edScreens/ConfiguredScreen.asp	?sid=CfgDef\$Res&code
Resource Detail Attributes f	or Martine LEDOUX		
Effective Date 1/4/2019			
Attributes			
	Resource Types	Associate (Employee) 🔻	
	Resource Role	<ul> <li>⊕ Add Resource Role attribute</li> <li>✓ (Primary selection)</li> </ul>	
			1. Develope
	Location	Kuala Lumpur 🔻	
	Vendor	[Select] [Select] [Con Technology	
	Region	Apex Systems Insight Global	
	Country	Jupiter Group TekSystems	
	Associate (Employee) ID	The Bayard Partnership	
	CC	CapGemini The Bayard Partnership	

6.5.15. Select a **Region** parameter by clicking the down caret next to the **Region** data selection field and clicking (<u>the appropriate Region</u>) from the options listed in the dropdown menu to select it. See figure PNP53.

Figure PNP53. Region selection options (partial screen capture only).

https://huntsmanit.pvcl	oud.com/planview/Configure	edScreens/ConfiguredScreen.asp?:	sid=CfgDef\$Res&code=
Resource Detail Attributes fo	or Martine LEDOUX		
Effective Date 1/4/2019	Apply.		
Attributes			
	Resource Types	Associate (Employee) 🔻	
	Resource Role	<ul> <li>⊕ Add Resource Role attribute</li> <li>✓ (Primary selection)</li> </ul>	
	Location	Kuala Lumpur 🔹	<ul> <li>1. Developer</li> </ul>
	Vendor	[Select ]	
	Region	APAC V	
	Country	Americas APAC	
	Associate (Employee) ID	EMEA	

6.5.16. Select a **Country** parameter by clicking the down caret next to the **Country** data selection field and clicking (<u>the appropriate Country</u>) from the options listed in the dropdown menu to select it. See figures PNP54 and PNP55

Figure PNP54. Country selection dropdown menu (partial screen capture only).

Resource Detail Attributes - Goo	gle Chrome		
https://huntsmanit.pvclou	d.com/planview/Configure	edScreens/ConfiguredScreen.asp?s	id=CfgDef\$Res&code=
Resource Detail Attributes for N			
Resource Detail Attributes for it			
Effective Date 1/4/2019	Apply.		
Attributes			
	Resource Types	Associate (Employee) 🔻	
	Resource Role	Add Resource Role attribute	
		V (Primary selection)	
			1. Developer
			9
	Location	Kuala Lumpur 🔻	
	Vendor	[Select ]	
	Region	APAC 🔻	
-	Country	Malaysia 🔻	
	Associate (Employee) ID	Argentina Australia	
	cc	Belgium Brazil	
-		China	
-		Colombia Czech Republic	
		Germany	
		Hungary	
		India	
		Indonesia Malaysia	
		Mexico	
		Netherlands	
		Singapore	
		Taiwan	
		Thailand	
		United Kingdom 👻	

Figure PNP55. Country selection options (dropdown menu screen capture only).

Malaysia	•	Malaysia	۲
Argentina		Australia	*
Australia		Belgium	
Belgium		Brazil	
Brazil		China	
China		Colombia	
Colombia		Czech Republic	
Czech Republic		Germany	
Germany		Guatemala	
Guatemala		Hungary	
Hungary		India	
India		Indonesia	
Indonesia		Malaysia	
Malaysia		Mexico	
Mexico		Netherlands	
Netherlands		Singapore	
Singapore		Switzerland	
Switzerland		Taiwan	
Taiwan		Thailand	
Thailand		United Kingdom	
United Kingdom	-	United States of America	*

## 6.5.17. The Associate (Employee) ID field is prefilled

NOTE: This field should not be edited unless an error was discovered. This data does not change from one project to another.

6.5.18. The CC field is prefilled)

NOTE: This field (Cost Center) should not be edited unless an error was discovered. This data does not usually change from one project to another.

6.5.19. Verify all data entered and selected is complete and correct.

6.5.20. After verification, click Save on the extreme right side of the Resource Detail

### Attributes for (name) dialog box. See figure PNP56.

Figure PNP56. Resource Detail Attributes for (Name) dialog box with Save highlighted (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).

Resource Detail Attributes - Google Chrome		
https://huntsmanit.pvcloud.com/planview/Configure	dScreens/ConfiguredScreen.asp?sid=CfgDef\$Res	&code=1Mohd%20Salud&popup፦
		×
Resource Detail Attributes for Afzan Mohd Salud		
Effective Date 1/8/2019		
Attributes		Required Fields
Resource Types	Associate (Employee) 🔻	
Resource Role	Add Resource Role attribute	
	✓ (Primary selection)	
	1. D	veloper Default 🔻 Ӿ
Location	Santo Amaro 🔻	
Vendor	[Select ]	
Region	Americas 🔻	_
Country	Brazil 🔻	
Associate (Employee) ID	119055	
cc	BR51301059	
		Save Cancel

6.5.21. After the **Resource Detail Attributes for (name)** dialog box is closed the **Portfolio View** screen is displayed.

### 6.6. Assignments Graph

NOTE: Assignments graph is not currently utilized because direct resources are not being assigned to projects at the time of this publication.

6.6.1. Click on the Action menu (the vertical ellipses or three dots) next to any listed resource to reveal the Action menu for that resource. See figure PNP57.

Figure PNP57. Portfolio View Action menu (partial screen capture only).



		Name	Resource Start Date	Resource Finish Date
:	쓝	AK Aditi Kokil		
:	32	AB Afrin Baig		
÷	À	AM Afzan Mohd Salud		
	Reso	urce View		
=	Assig	nments Graph		
		An Analit van den broeck		
:	$\dot{\mathbf{x}}$	AR Alalaine Rabe Quintans		
:	\$	AR Alexandre Rodrigues		

# 6.6.2. Click Assignments Graph in the Action menu to view the Assignments Graph for the selected resource See figure PNP58.

Figure PNP58. Action Menu- Assignments Graph (partial screen capture only).



III Resource Info - Basic 🔻

		Name	Resource Start Date	Resource Finish Date
:	2	AK Aditi Kokil		
3	\$	AB Afrin Baig		
÷		AM Afzan Mohd Salud		
	Reso	urce View		
	Assig	nments Graph		
-		Aver Alain van den broeck		
:	1	AR Alalaine Rabe Quintans		
:	*	AR Alexandre Rodrigues		

#### 6.6.3. The Assignments Graph screen is displayed. See figure PNP59.

NOTE: The Assignments Graph screen defaults to the Graphical Work Schedule view.

NOTE: A considerable amount of data is displayed in the Graphical Work Schedule screen but requires sideways scrolling to view it in total.

Figure PNP59. Assignments Graph screen- Graphical Work Schedule (partial screen capture only- the actual Planview screen is wider and displays additional data when scrolling right).



#### **Graphical Work Schedule**

NOTE: The Graphical Work Schedule displays all work items for the selected resource. It is divided into two sections, one showing the resource profile and the other showing the work items that make up that profile.

NOTE: The display period will start at Time Now unless Time Now occurs before the start of the earliest work item in which case the display period will start at the start date of the earliest work item.

6.6.4. Select a Timescale setting for the Graphical Work Schedule by clicking the down caret next to Timescale and clicking (the appropriate timescale setting) from the listed options in the dropdown menu to select it. See figure PNP60.

NOTE: The display period is 5 years when using the year timescale; when using the month and week timescales the display period is 2 years.

Figure PNP60. Timescale selection options in the Graphical Work Schedule screen (partial screen capture only).



6.6.5. Select a **Units** setting for the **Graphical Work Schedule** by clicking the down caret next to **Units** and clicking (<u>the appropriate units setting</u>) from the listed options in the dropdown menu to select it. See figure PNP61.

Figure PNP61. Units selection options in the Graphical Work Schedule screen (partial screen capture only).



6.6.6. Select a Work Displayed setting for the Graphical Work Schedule by clicking the down caret next to Work Displayed and clicking (<u>the appropriate Work Displayed</u> <u>setting</u>) from the listed options in the dropdown menu to select it. See figure PNP62.
 Figure PNP62. Work Displayed options in the Graphical Work Schedule screen (partial screen capture only).



6.6.7. Select a Sort Order setting for the Graphical Work Schedule by clicking the down caret next to Sort Order and clicking (<u>the appropriate Sort Order setting</u>) from the listed options in the dropdown menu to select it. See figure PNP63.

Figure PNP63. Sort Order options in the Graphical Work Schedule screen (partial screen capture only).



NOTE: Profiles are displayed in red when the selected resource is over booked.

# 6.6.8. Click the Numerical Work Schedule hyperlink to switch to the Numerical Work Schedule screen. See figure PNP64.



Figure PNP64. Numerical Work Schedule hyperlink (partial screen capture only).

#### 6.6.9. The Numerical Work Schedule screen is displayed. See figure PNP65.

Figure PNP65. Numerical Work Schedule screen (partial screen capture only- the actual Planview screen is considerably wider).

Resource Summary for Krish Santhanagopalan													
Timescale 💌													
Units 🕞 Work Displayed 🕞		2018 Nov	2018 Dec	2019 Jan	2019 Feb	2019 Mar	2019 Apr	2019 May	2019 Jun	2019 Jul	2019 Aug	2019 Sep	2019 Oct
Resource: Krish Santhanagopalan	Sched.	0 d	0 d	0 d	0 d	0 d	0 d	0 d	0 d	0 d	0 d	0 d	0 d
1 FTE	Avail.	5 d	21 d	23 d	20 d	21 d	22 d	23 d	20 d	23 d	22 d	21 d	23 d
	Total Cap.	5 d	21 d	23 d	20 d	21 d	22 d	23 d	20 d	23 d	22 d	21 d	23 d

#### **Numerical Work Schedule**

This screen shows all work to which the resources in your portal are scheduled. The resource name link displays the profile view for that resource. The work description link displays the

assignment detail screen and the dropdown menu next to it opens other informational screens about the work and provides access for updating the assignment when applicable. The effort link displays the work details for a time period. The dropdown menus at the top left corner of the screen allow you to change the timescale shown, the units used for the display of effort and whether to display scheduled work, requested work or both. The display period will start at Time Now unless Time Now occurs before the start of the earliest work item in which case the display period will start at the start date of the earliest work item. The display period will be 5 years for the year timescale and 2 years for the month and week timescales.

6.6.10. Select a Timescale setting for the Numerical Work Schedule by clicking the down caret next to Timescale and clicking (the appropriate timescale setting) from the listed options in the dropdown menu to select it. See figure PNP66.

Figure PNP66. Timescale options in the Numerical Work Schedule screen (partial screen capture only).

Resource Summary for Krish Santhanagopalan									
Timescale 🛋	1								
Weeks Months			2018 Nov 25	2018 Dec 2	2018 Dec 9	2018 Dec 16	2018 Dec 23	2018 Dec 30	2019 Jan 6
Years	nthanagopalan	Sched.	0 d	0 d	0 d	0 d	0 d	0 d	0 d
1 FTE		Avail.	5 d	5 d	5 d	5 d	5 d	5 d	5 d
		Total Cap.	5 d	5 d	5 d	5 d	5 d	5 d	5 d
Science Schedule									

6.6.11. Select a **Units** setting for the **Numerical Work Schedule** by clicking the <u>down caret</u> next to **Units** and clicking (<u>the appropriate units setting</u>) from the listed options in the dropdown menu to select it. See figure PNP67.

Figure PNP67. Units options in the Numerical Work Schedule screen (partial screen capture only).

Resource Summary for Krish Santhanagopalan

Timescale 🕞									
Units 🛋			2018	2018	2018	2018	2018	2018	2019
Hours			Nov 25	Dec 2	Dec 9	Dec 16	Dec 23	Dec 30	Jan 6
Days	nthanagopalan	Sched.	0 d	0 d	0 d	0 d	0 d	0 d	0 d
Weeks		Aug il							
FTEs		Avall.	5 d	5 d	5 d	5 d	5 d	5 d	5 d
		Total Cap.	5 d	5 d	5 d	5 d	5 d	5 d	5 d
•									

Graphical Work Schedule

6.6.12. Select a Work Displayed setting for the Numerical Work Schedule by clicking the down caret next to Work Displayed and clicking (<u>the appropriate Work Displayed</u> <u>setting</u>) from the listed options in the dropdown menu to select it. See figure PNP68.

Figure PNP68. Work Displayed options in the Numerical Work Schedule screen (partial screen capture only).

Resource Summary for Krish Santhanagopalan									
Units 🕞	_		2018	2018	2018	2018	2018	2018	2019
Work Displayed 🔺			Nov 25	Dec 2	Dec 9	Dec 16	Dec 23	Dec 30	Jan 6
Approved	anagopalan	Sched.	0 d	0 d	0 d	0 d	0 d	0 d	0 d
All		Avail.	5 d	5 d	5 d	5 d	5 d	5 d	5 d
		Total Cap.	5 d	5 d	5 d	5 d	5 d	5 d	5 d
Stappical Work St	chedule								

6.6.13. Click the Graphical Work Schedule hyperlink to return to the Graphical Work

#### Schedule screen. See figure PNP69.

Figure PNP69. Graphical Work Schedule hyperlink in the Numerical Work Schedule screen (partial screen capture only).

Resource Summary for Krish Santhanagopalan

Timescale 🕞								
Units 👿		2018	2018	2018	2018	2018	2018	2019
Work Displayed 🗨		Nov 25	Dec 2	Dec 9	Dec 16	Dec 23	Dec 30	Jan 6
Resource: Krish Santhanagopalan	Sched.	0 d	0 d	0 d	0 d	0 d	0 d	0 d
1 FTE	Avail.	5 d	5 d	5 d	5 d	5 d	5 d	5 d
	Total Cap.	5 d	5 d	5 d	5 d	5 d	5 d	5 d
Graphical Work Schedule								

### 6.6.14. The Graphical Work Schedule screen is displayed. See figure PNP70.

Figure PNP70. Graphical Work Schedule (partial screen capture only- the actual Planview screen is wider and displays additional data when scrolling right).



//////Denied Reserve

Requested Allocation

Back to Top