



# Program Management Manual

Version 3.0

**bijingo!** *Informal.* (an exclamation used to emphasise the truth or importance of a foregoing statement, or to express astonishment, approval, etc.): *I know you can do it, bijingo!*



# Program Management Manual

Bijingo Pty Ltd  
Melbourne, Victoria

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The example organisations, users and projects depicted herein are fictitious. No association with any real company, users or projects should be inferred.



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# 1. Program Management System

Within any given organisation, there may be a large number of Project Managers who all managing a number of projects, in conjunction with or independent of each other. Projects may be grouped by program or department, and be the responsibility of one or more project managers. For management reasons, the group of projects may be broken up into three streams, which are managed independently of each other. This same group of projects may be of a confidential nature and be off limits to all other project managers and team members in the organisation. Further to this complexity, administrative roles may be given to several key team members on each project to help with its day to day running,

There are countless other possibilities for grouping and managing projects and project teams within an organisation. Bijingo uses a Program Structure and Project Team roles to allow an organisation to implement a flexible and structured approach to managing their project teams and projects.

Users who have a Project manager profile can be assigned program and project manager roles within the program structure. These roles allow these users to create, view and manage projects within their section of the structure. Other program structure roles include the Project Viewer and Project Approver roles. Further to this, there are a number of project team roles that can be assigned to team members which adds more flexibility to the composition of project teams and roles.

## 1.1 Program Management Roles

There are four Program Level roles which can be applied at any given position within the Program Structure. These roles are effective at the position they are applied and any position below.

A user who assigned as a Program or Project Manager in the Program Structure must have a Project Manager user profile. See the section on managing Bijingo users for more details on assigning user profiles.

### Program Manager

A user who is assigned the Program Manager role at a given position within the program structure has the following privileges:

- create projects at and below that position.
- view and manage all projects at and below that position.

This user would have control over all projects without having to be assigned to any of the projects.

### Project Manager

A user who is assigned the Project Manager role at a given position within the program structure has the following privileges:

- create projects at or below that position
- manage the projects they create
- view all projects at and below that position.

### Project Viewer

A user who is assigned the project viewer role at a given position within the program structure has the following privilege:

- view all projects at and below that position.

### Project Approver

This role is only applicable when Project Approvals are enabled. See the Administrator manual for more details about Project Approvals.

A user who is assigned the project approver role at a given position within the program structure has the following privilege:

- approve all projects at and below that position.

It is recommended to assign the Project Viewer role to all users who have the Project Approver role. This will allow them to view the project details on the projects prior to approving them.

## 1.2 Project Team Roles

As well as implementing Program Level roles, Project Manager and Project Viewer Roles can be assigned to team members. This allows the project owner to customise management and view rights to their team without having to modify the program structure.

### Project Owner

The project owner is, by default, the user who created the project. As the project owner, they are initially responsible for setting up the project and assigning resources and roles. A role of Project owner can be reassigned by modifying the owner field on the Project Details page (see the Project Managers Manual for more details). Only user with a Project Manager profile can be assigned the role of Project Owner.

### Project Manager

Within the Project Team, the project owner is initially the only project manager within the team. At this point, the only other users who can manage the project are Program Managers who have privileges to position the project is attached to, even if they are not part of the project team.

However, if required, team members on the project can be the role of Project Manager, even if they do not have a project manager user profile. By doing this, the user will be able to assist in the management of the project, including managing tasks and assignments. The user will see the project in the project console, even if the project belongs to a position in the structure they do not have privileges for.

### Project Viewer

When a Project is first created, the Project Manager assigned to same position as the project within the program structure has view rights to the project. Team Members within the team can be reassigned the role of Project Viewer which also allows these users to view project details without having the ability to change anything. The user will see the project in the project console, even if the project belongs to a position in the structure they do not have privileges over.

### Team Member

By default, all resources added to a project except for the project owner are team members. Team members can only see the tasks, IRC items and attachments they are assigned to from their home.

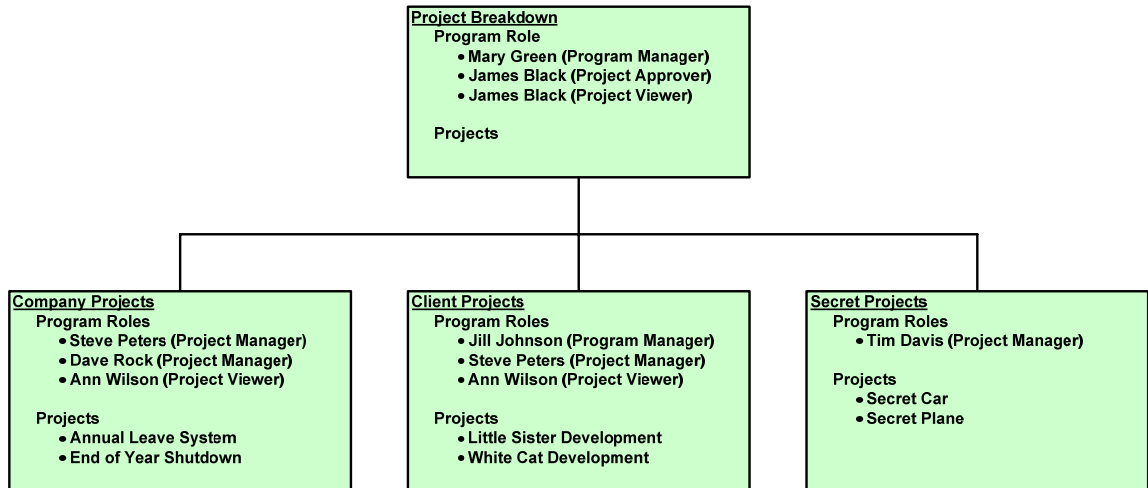
## 1.3 Project Journal

There could be several users within an organisation that have the ability to modify a project given the flexibility of assigning program and project team roles. The Project Journal has been designed to keep track of who does what within a project. By turning on this functionality, all events which affect a project, including changes made by the resource manager, are recorded and dated. See the Project Manager Manual for more details.

## 1.4 Project Management Flow Example

The work flow for Program Management works at two levels. Firstly, there are roles assigned and the Program. Program Breakdown Structure below displays roles assigned to users in the system. The assigned role and position dictates the privileges that the user has over the projects. The user does not need to be added to the project team for these privileges to take affect. However, add a user to the project team and reassigning their role within the project can override their privilege from the program structure.

### Program Structure Roles



- Mary Green: Program Manager at the top of the structure gives her management rights over all projects. Mary can add new projects to any position in the structure.
- James Black: Project Approver and Viewer at the top of the structure gives James approval and view rights over all projects
- Steve Peters: Project Manager rights of Company and Client Projects allows Steve the right to add new Company and Client Projects as well as view all Company and Client Projects.
- Dave Rock: Project Manager rights of Company and Client Projects allows Dave the right to add new Company and Client Projects as well as view all Company and Client Projects.
- Ann Wilson: Project Viewer rights of Company and Client Projects gives Ann the right to view Company and Client Projects.
- Jill Johnson: Program Manager of Client Projects gives Jill management rights over all Client Projects and the ability to add new Client Projects.
- Tim Davis: Project Manager rights of Secret Projects gives Tim the right to add new Secret Projects only. Tim can also view all Secret Projects.

Project	Approval Rights	Management Rights	View Rights
Top Level Projects	James Black	Mary Green	James Black
Company Projects	James Black	Mary Green Steve Peters (own) Dave Rock (own)	James Black Steve Peters Dave Rock Ann Wilson
Client Projects	James Black	Mary Green Jill Johnson Steve Peters (own)	James Black Steve Peters Ann Wilson
Secret Projects	James Black	Mary Green	James Black

		Tim Davis (own)	Tim Davis
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### Project Team Roles

To take this example further, we can assign team roles to users in the Little Sister Project in the Client Project department. The project creator and owner for this project is Jill Johnson. The following users have been made team members on the project and have been assigned work.

Therefore, the base permissions to the project are as follows.

Team Member	Project Role	Privileges	Explanation
Ann Wilson	Team Member	Project View Rights	Maintains view rights from the program structure
Dave Rock	Team Member	Team Member Rights	Maintain project team role rights. User has no program structure rights over this project
Jill Johnson	Project Manger (Owner)	Project Manager	Has Program Manager Rights on Program Structure and Project Manager team role.
Mary Green	Team Member	Project Manager	Maintains Project Manager rights from the program structure
Melissa Johnson	Team Member	Team Member Rights	No Program Structure Role - Maintain Project team role.
Phillipa McClure	Team Member	Team Member Rights	No Program Structure Role - Maintain Project team role.
Steve Kumar	Team Member	Team Member Rights	No Program Structure Role - Maintain Project team role.
Steve Peters	Team Member	Project View Rights	Maintains view rights from the program structure

In addition, James Black has project viewer rights based on his program role.

Now, we are going to promote 2 users: Melissa Johnson will be reassigned to Project Viewer role and Steve Kumar will be made a Project Manager

Project Level Permissions	User	Explanation
Project Manager	Jill Johnson (owner)	Created the project and is still assigned as project owner in the project details
	Mary Green	Maintains Program Management privileges, even though she as assigned as a Team Member on the project
	Steve Kumar	Steve has be reassigned Project Manager privileges at the Project level
Project Viewer	Melissa Johnson	Melissa has be reassigned Project Viewer privileges at the Project level
	Ann Wilson	Maintains Project View privileges from the Program Structure, even though she as assigned as a Team Member on the project
	James Black	Even though he is not part of the team, he can view the project based on Program Structure privileges
	Steve Peters	Maintains Project View privileges from the Program Structure, even though she as assigned as a Team Member on the project
Team Member	Dave Rock	Does not have project management or view rights over Client Projects and maintain Team Member privileges
	Phillipa McClure	Maintains Team Member privileges

## 2 Implementing Program Structure

There are two administrative steps an organisation must perform to turn on the Resource Management System.

### 1. **Select Program Management Structure**

The Administrator must select a structure which will be used to manage the workflows for program management. (See the Codes and Structures Manual for more details).



#### **Note**

It is strongly recommended that an Organisation or Program Breakdown Structure is used when implementing the Program System as they naturally reflect the management of project within an organisation. Avoid using the Resource, Timesheet and Skill Breakdown Structures if possible.

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1. Select the Structure which is to used for Program Management
2. Click the Set Program Structure icon
3. The Selected structure will be marked as the Program Structure.

### 2. **Assign Roles to the Structure.**

The Administrator the must assign Program Managers, Project Managers, Project Viewer and Project approver roles to users within the Program structure. See the example in this manual for details on assigning roles. (See the Codes and Structures Manual for more details)