



# Resource 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!*



# Resource Management Manual

Bijingo Pty Ltd  
Melbourne, Victoria

This manual covers version 3.0 of Bijingo  
Manual published: 18<sup>th</sup> June 2007  
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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. Resource Management

## 1.1 Introduction

Resource management is one of the most challenging aspects of project management. Planning your resources is one thing, but tracking and levelling them is a whole other challenge. This does not even take into account different personalities of the resources who work on the project.

Resource Levelling requires a project or resource manager to combine their knowledge of the project they are modelling, display functions within the tool, resource effort / assignment / estimate details and basic problem solving.

This is made all the more complex when considering multiple projects!

The Resource Management Centre has been designed to bring all the necessary information to your fingertips and allows you to act upon this information by either informing others or resolving the issues yourself.

## 1.1 Resource Management Example Setup

The Resource Management Centre allows an organisation to implement a structured process to manage their resources. If enabled, Bijingo uses a Structure as the basis to configure logical work flow hierarchies of resources and resource managers.

A Resource Manager can view resources' planned and remaining allocation details. Any user can be assigned the role of resource manager which will allow them to perform the resource management role.

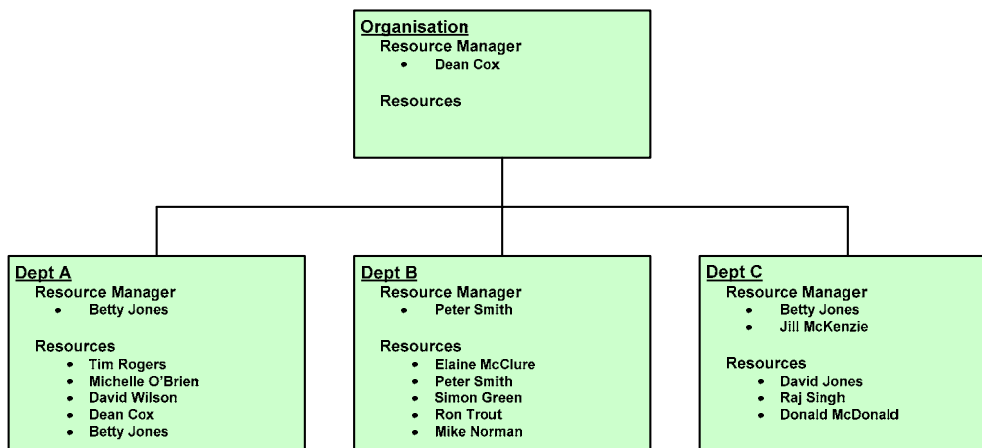


Figure 1: Example of the Resource Approval Workflow

The example above illustrates how an organisation may implement their resource management system.

- Dean Cox has the authorisation to manage all Resources within the organisation.
- Betty Jones can manage resources from Dept A and Dept C
- Peter Smith can only manage Dept B resources.
- Jill McKenzie can only manage Dept C resources
- Resources in Dept A can be managed by Betty or Dean.
- Resources in Dept B can be managed by Dean or Peter.
- Resources in Dept C can be managed by Dean, Betty or Jill.



## 2. Resource Manager

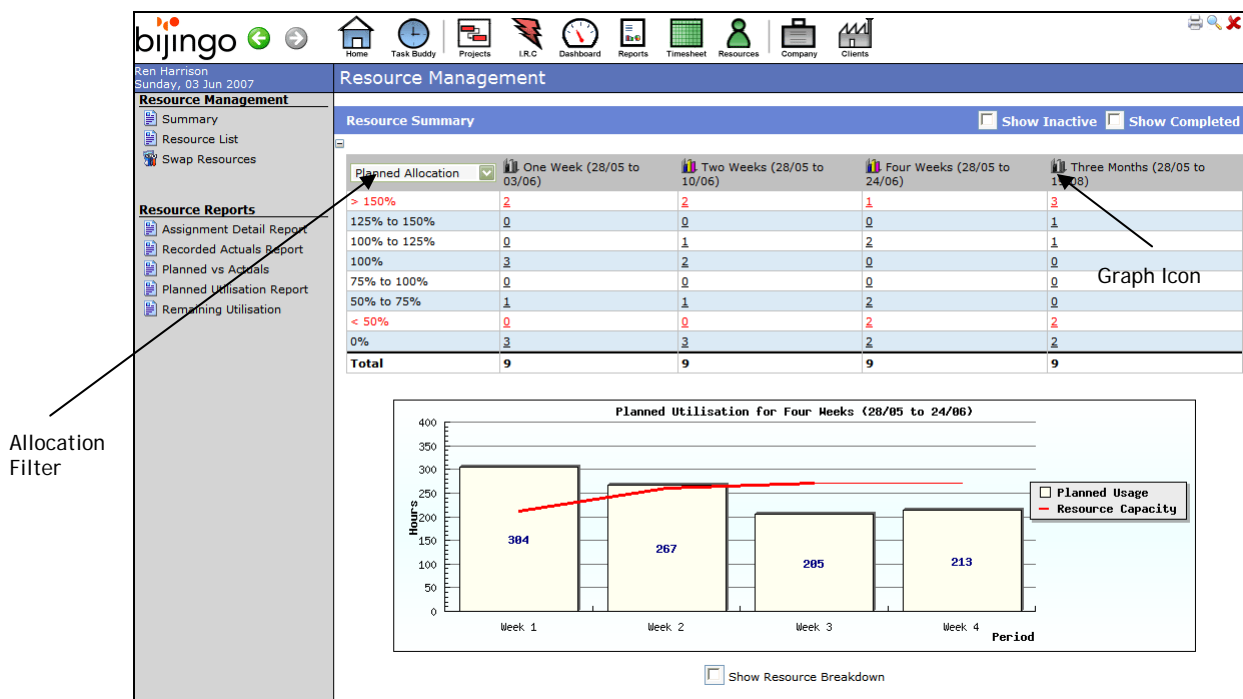
Resource Managers are assigned roles in the Resource Structure at a level which allows them to manage resources at or below their level within the structure. For more information on structures please see Bijingo Codes and Structures Manual.

Resource Managers are presented a Resource Centre Icon on the Navigation bar.



### 2.1 Resource Summary

The Resource Summary Page provides the user with a quick overview of the current work allocation for the resources that they are authorised to manage.



#### Links to Filtered Resource Management List

The Resource Manager can click on the underlined links in the Resource Summary and be taken directly to an applied filter of the Resources that meet that criterion. For example, clicking on the underlined number in the > 150% row which corresponds with the 3 months column will open the Resource Management list filtered to resources that are overloaded by more the 150% for the next 3 months.

#### Change graph view to other period

The Resource Manager can click on the graph icon to change the period for which the graph is displayed from 1 week through to 3 months by clicking on the corresponding Graph Icon next to the time period. By selecting "Show Resource Breakdown" the graph will then display a breakdown of the users in the Resource managers group.

Note: No more than ten resources are displayed separately when the "Show Resource Breakdown" checkbox is selected. The remaining resources are grouped together in an "Other Resources" section.

#### a. Filter

The criteria used to summarise the resources can be switched between the Planned or Remaining Allocation by selecting the Allocation Filter.

| Filter   | Description  |
|--|--|
| <b>Planned Allocation / Remaining Allocation</b> | This allows you to view the planned allocation on tasks or remaining allocation on tasks. If you are using the timesheet functionality the remaining allocation at default will be the planned work minus the actual work, unless the timesheet user has re-estimated the remaining work on this task. |

## 2.2 Resource List

The Resource Management Centre Resource List can be accessed by clicking through from the summary page hyperlinks or from the "Resource List" Icon in the left hand menu.

A Resource Manger can see a list of all the resources that they have authorisation to manage. The List has several duration, status and resource-structure based filters which allows for quick and useful navigation of Resources.

| Resource List                           |                  |                 |                    |  |                     |           |                       |         |                    |
|---|------------------|-----------------|--------------------|--|---------------------|-----------|-----------------------|---------|--------------------|
| <input type="checkbox"/> Show Completed |                  |                 |                    | Period: One Week (28/05 to 03/06)      |                     |           |                       |         |                    |
| Resource List (1 to 9 of 9)             |                  |                 |                    |  |                     |           |                       |         |                    |
|   |                  |                 |                    | <input type="checkbox"/> Show Inactive |                     |           |                       |         | Resource Structure |
| All                                     | Full name        | Tasks in period | Projects in period | Estimated                              | Planned Utilisation | Remaining | Remaining Utilisation | Overdue |                    |
| ▶                                       | Andrew Jones     | 2               | 1                  | 40.00                                  | 100.00%             | 40.00     | 100.00%               | 320.00  |                    |
| ▶                                       | Anna Williams    | 2               | 1                  | 40.00                                  | 100.00%             | 40.00     | 100.00%               | 440.00  |                    |
| ▶                                       | Ben Dickson      | 4               | 2                  | 72.00                                  | 200.00%             | 88.00     | 200.00%               | 272.00  |                    |
| ▶                                       | Betty McDonald   | 4               | 2                  | 72.00                                  | 200.00%             | 88.00     | 200.00%               | 272.00  |                    |
| ▶                                       | Cathy Smith      | 2               | 1                  | 24.00                                  | 60.00%              | 40.00     | 506.67%               | 16.00   |                    |
| ▶                                       | Charles Anderson | 3               | 1                  | 24.00                                  | 100.00%             | 64.00     | 100.00%               | 96.00   |                    |
| ▶                                       | Enzo Verdi       | 0               | 0                  | 0.00                                   | 0.00%               | 0.00      | 0.00%                 | 0.00    |                    |
| ▶                                       | Ren Harrison     | 0               | 0                  | 0.00                                   | 0.00%               | 0.00      | 0.00%                 | 120.00  |                    |
| ▶                                       | Ziggy Younga     | 0               | 0                  | 0.00                                   | 0.00%               | 0.00      | 0.00%                 | 0.00    |                    |

**a. Filters**






There are three levels of filters on the Resource Management List. The user can select a Resource, Duration or Status Filter.

|  |                   |                                    |
|--|-------------------|------------------------------------|
| If the Resource List is accessed via the Resource Summary Page, two extra filters are available to filter the resource list (Type and Allocation). |                   |                                    |
| Type: Planned  | Allocation: < 50% | Period: Two Weeks (04/09 to 17/09) |

| Filter                        | Description  |
|-------------------------------|--|
| <b>Period</b>                 | This allows you to select the period for which you want to view the page. This can range from 1 week to 3 months.  |
| <b>Resource Structure</b><br> | This allows people who have multiple groups of people to manage to drill into specific resource area's allocation and availability for each group of resources.<br>This icon allows you to view the position selector within the resource structure. |
| <b>Position Selector</b><br>  | The position selector allows you to filter resources based on their position within the Resource Structure by checking or un-checking the boxes.   |
| <b>Type</b>                   | This allows you to select whether the Allocation filter uses Planned or Remaining Allocation to filter resources. <b>NB:</b> This filter is only available if accessed via the Resource Summary page.  |
| <b>Allocation</b>             | This filters the list based on the resources' allocation (the type of allocation is set by the Type Filter) during the selected period (set by   |

|  |   |
|--|---|
|  | the Period Filter). <b>NB:</b> This filter is only available if accessed via the Resource Summary page. |
|--|---|

**b. Functions**

| Icon  | Description   |
|---|---|
|  | <b>View</b><br>This icon takes you to the resource view page where you can view what is assigned to a particular resource   |
|  | <b>Swap</b><br>The swap tool allows you to move work from one resource to another. If two or more resources are selected - the resources with lowest and the highest allocation will be selected by default in the swap tool. |
|  | <b>Notify Project Manager</b><br>The email notification tool allows you to notify project managers and request action to be taken against resource(s)   |
|  | <b>Graph Selected Resources</b><br>This allows you to graphically display resource data across projects, resource groups and individual resources.  |
|  | <b>Add Work</b><br>The Add Work icon allows you to add new tasks and assignments to projects (if you have project manager rights)   |

**c. Resource List Details**

The Resource list details the Team Members, the number of tasks, the number of project the resource is working, the estimated effort, the % planned allocation, the remaining work, the % remaining allocation and the number of hours overdue from the selected period.

**d. Resource Graph**

When the Graph Selected Resources Icon is clicked, the resource graph is displayed underneath the resource list. By selecting "Show Resource Breakdown" the graph will then display a breakdown of the resources you selected.

Note: No more than ten resources are displayed separately when the "Show Resource Breakdown" checkbox is selected. The remaining resources are grouped together in an "Other Resources" section.

## 2.3 Viewing a Resource

The View Resource Page allows the resource manager to see a detailed view of the resource's current and future allocation. By altering the Period Selector, one week through to three months, the "Assignments in Period" and "Utilisation Graph" tab details automatically update to match the newly selected period.

The screenshot shows the 'View Resource' interface. On the left, 'User account details' include: User Name: newUser00123456789, Full name: Administrator, Employee Number, Title, E-Mail, Work Phone, Home Phone, and Mobile Phone. On the right, 'Resource Information' shows: Total Assignments (Projects: 2, Tasks: 2, Estimated: 80.00, Overdue Work: 56.00), In period (Period: One Week (21/08 to 27/08)), Projects: 2, Tasks: 2, Estimated: 80, and Planned Utilisation: 110%. Below this is a 'Period Selector' dropdown menu. At the bottom, the 'Assignments in One Week (21/08 to 27/08)' section features a Gantt chart with columns for days of the week and bars representing task durations.

| Project                                 | Task                           | Mon      | Tue  | Wed  | Thu | Fri | Sat | Sun |
|---|--------------------------------|----------|------|------|-----|-----|-----|-----|
| Advanced Search Listing - Pilot Program | Task 1                         | 24 Hours |      |      |     |     |     |     |
| Building a house_Test_MJ                | Organising Parts for Phase two | 40 Hours |      |      |     |     |     |     |
| <b>Total:</b>                           |                                | 12 h     | 12 h | 12 h | 4 h | 4 h | 0 h | 0 h |

**a. Details**

The page contains some basic User Account (resource) details including the user name, full name, employee number, title, email address and phone numbers. The Total Assignments section details the summary of all the resource's work including the current amount of overdue work. The In Period section contains a selector which allows the resource manager to change the outlook of the current page from one week to three months. This section also lists the project, tasks, estimated work and planned utilisation within the selected period.

**b. Functions**

The following functions can be performed from the details section of the View Resource page.

| Icon | Description   |
|------|---|
|      | The swap tool allows you to move work from one resource to another  |
|      | The email notification tool allows you to notify project managers and request action to be taken against resource(s)                                |
|      | This opens the Find Resource Window to allow you to quickly view another resource's details. See the Find Resource Window section for more details. |
|      | The Add Work icon allows you to add new tasks and assignments to projects (if you have project manager rights)                                      |




**c. Assignments in Period tab**

The "Assignments in Period" tab displays a list of tasks that the resource is assigned to within the selected period in the details section of the page. The assignments are displayed in Gantt chart format and lists the resource's assigned hours for each task within the given period. A filter on the list changes the display from planned work to remaining work.

This screenshot shows the 'Assignments in Period' tab. It features a 'Remaining Work' dropdown filter and a 'Selected Period' label pointing to the date range '21/08 to 27/08'. The Gantt chart below lists tasks with their durations across the days of the week.

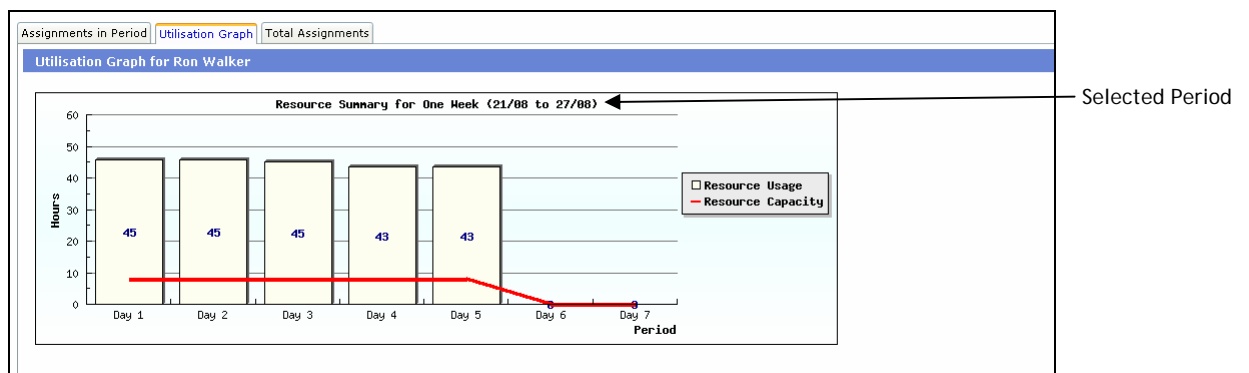
| Project                                 | Task                                      | Mon         | Tue     | Wed     | Thu     | Fri     | Sat | Sun |
|---|---|-------------|---------|---------|---------|---------|-----|-----|
| Test Export                             | Task 2                                    | 20 Hours    |         |         |         |         |     |     |
| Test Export                             | Long One                                  | 26.67 Hours |         |         |         |         |     |     |
| Tuesday                                 | Design Phase 2                            | 40 Hours    |         |         |         |         |     |     |
| Tuesday                                 | Design Phase 3                            | 0 Hours     |         |         |         |         |     |     |
| import3_ITM_User_Front_End_Delivery_... | Programme management - ITM front end...   | 40 Hours    |         |         |         |         |     |     |
| import3_ITM_User_Front_End_Delivery_... | Technical management - ITM front end d... | 40 Hours    |         |         |         |         |     |     |
| Thursday                                | Design Phase 2                            | 5 Hours     |         |         |         |         |     |     |
| Thursday                                | Design Phase 3                            | 10 Hours    |         |         |         |         |     |     |
| Thursday                                | Implementation 1                          | 14.4 Hours  |         |         |         |         |     |     |
| Building a house_Test_MJ                | kitchen fitting                           | 0 Hours     |         |         |         |         |     |     |
| <b>Total:</b>                           |   | 24.72 h     | 24.72 h | 24.72 h | 24.72 h | 24.72 h | 0 h | 0 h |

The following functions can be performed by selecting an assignment from the list.

| Icon  | Description  |
|---|--|
|  | View the assignment in details. The View Assignment page opens.  |
|  | Edit the selected assignment allows the resource manger to alter the effort, duration or allocation the resource is assigned to the tasks.   |
|  | Remove the resource from the tasks. Performing this function will remove the resource from the selected assignment and reduce the work on the task by the amount of remaining work left of the assignment. Only the remaining work can be removed. |

**d. Utilisation Graph tab**




The graph on this page displays the utilisation of the resource against its capacity. The resource is over allocated if the totals for any period are above the resource capacity line, and under allocated if below. Ideally, the period totals should be as close as possible to the red resource capacity line.



**d. Total Assignments tab**

The total assignments tab lists all tasks that a resource is assigned to which has work remaining. Completed assignments are not displayed on this list.


The following functions can be performed by selecting an assignment from the list.

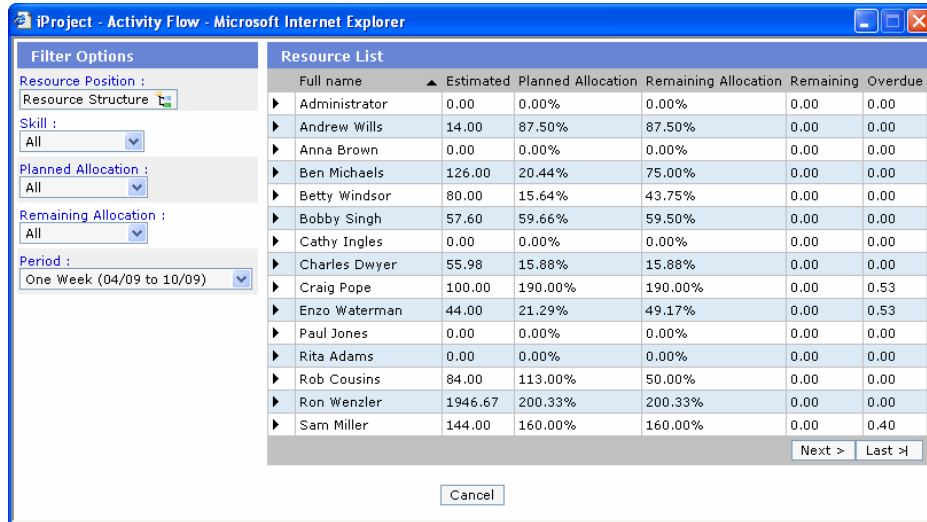
| Icon  | Description  |
|---|--|
|  | View the assignment in details. The View Assignment page opens.  |
|  | Edit the selected assignment allows the resource manger to alter the effort, duration or allocation the resource is assigned to the tasks.   |
|  | Remove the resource from the tasks. Performing this function will remove the resource from the selected assignment and reduce the work on the task by the amount of remaining work left of the assignment. Only the remaining work can be removed. |

| Task                                    | Project                          | Planned | Actual | Remaining | Allocation | Status  | Completion | Start Date | Due Date   |
|---|----------------------------------|---------|--------|-----------|------------|---------|------------|------------|------------|
| 1.1.1 Administer and manage ITM from... | import3_ITM_User_Front_End_De... | 936.00  | 0.00   | 936.00    | 100%       | Pending | 0.00%      | 19/01/2007 | 10/07/2007 |
| 1.1.2 Programme management - ITM fro... | import3_ITM_User_Front_End_De... | 960.00  | 0.00   | 960.00    | 100%       | Pending | 0.00%      | 31/07/2006 | 18/01/2007 |
| 1.1.3 Technical management - ITM fro... | import3_ITM_User_Front_End_De... | 960.00  | 0.00   | 960.00    | 100%       | Pending | 0.00%      | 31/07/2006 | 18/01/2007 |
| 1.2 Task 2                              | Test Export                      | 40.00   | 20.00  | 20.00     | 33%        | Open    | 50.00%     | 07/08/2006 | 25/08/2006 |
| 2 Long One                              | Test Export                      | 26.67   | 0.00   | 26.67     | 0.33%      | Pending | 0.00%      | 21/08/2006 | 30/07/2010 |
| 2.2 Design Phase 2                      | Tuesday                          | 44.00   | 0.00   | 44.00     | 50%        | Open    | 10.00%     | 15/08/2006 | 29/08/2006 |
| 2.2 Design Phase 2                      | Thursday                         | 5.00    | 0.00   | 5.00      | 6%         | Open    | 0.00%      | 15/08/2006 | 29/08/2006 |
| 2.3 Design Phase 3                      | Thursday                         | 4.00    | 0.00   | 10.00     | 5%         | Pending | 0.00%      | 15/08/2006 | 29/08/2006 |
| 2.3 Design Phase 3                      | Tuesday                          | 88.00   | 4.00   | 0.00      | 100%       | Open    | 10.00%     | 15/08/2006 | 29/08/2006 |
| 3.1 Write Technical Design              | Project A                        | 32.00   | 0.00   | 32.00     | 100%       | Pending | 0.00%      | 10/08/2006 | 15/08/2006 |
| 3.2 Review Technical Design             | Project A                        | 8.00    | 0.00   | 8.00      | 100%       | Pending | 0.00%      | 16/08/2006 | 16/08/2006 |
| 4.1 Implementation 1                    | Thursday                         | 14.40   | 0.00   | 14.40     | 20%        | Open    | 0.00%      | 21/08/2006 | 31/08/2006 |
| 5.1 System Testing                      | New Intranet reporting tool      | 18.00   | 0.00   | 18.00     | 75%        | Pending | 0.00%      | 30/01/2007 | 02/02/2007 |
| 5.1 Testing 1                           | Thursday                         | 124.80  | 0.00   | 124.80    | 60%        | Pending | 0.00%      | 11/09/2006 | 16/10/2006 |

## 2.4 Find Resource Window

The Find Resource Window allows the Resource Manager to quickly and easily find a resource using various filters. This window is used on both the View Resource and Swap Assignments pages.

The Find Resource Window will open whenever you click on the Find Resource Icon .




### How to Select a Resource

1. The Find Resource page displays a list of resources that you are authorised to manage.
2. Use the filters on the left hand page side of the page to restrict or expand the resource list.
3. Click on the desired resource to close the Find Resource Window and return with the selected resource.

### Filters

There are four filters available to update the resource list.

| Filter  | Description  |
|---|--|
| <b>Resource Position</b><br> | The position selector allows you to filter resources based on their position within the Resource Structure by checking or un-checking the boxes. |
| <b>Skill</b>  | If the Skills Structure has been enabled, you can select the skill that you want to filter the resource list by.                                 |
| <b>Planned Allocation</b>   | Select the percentage range to filter the resource list by their planned allocation.   |
| <b>Remaining Allocation</b>   | Select the percentage range to filter the resource list by their remaining allocation.   |
| <b>Period</b>   | This filter does not affect which resources are displayed in the list. Rather, it recalculates all the values displayed in the list.             |

## 2.5 Notifications

A Resource Manager has two courses of action when trying to balance the load of resources.

- They can either perform the action themselves, or
- they can notify the project manager of the problem, leaving the responsibility of resource balancing to one or more project managers.

The Notification tool provides a basic template wherein the resource manager can select from various options to send messages to the project manager(s) regarding the selected resource.

The screenshot shows a web browser window titled "iProject - Activity Flow - Microsoft Internet Explorer" displaying a "Send Notification to Project Managers" dialog. The dialog is for resource "Charles Dwyer". It features several sections:
 

- Period:** A dropdown menu set to "One Week (04/09 to 10/09)".
- Resource Summary:** A table showing "Projects: 2", "Tasks: 2", "Estimated: 55.983", and "Planned Utilisation: 15.875%".
- Context:** Two dropdown menus: "All Projects" (Project Context Selector) and "This resource (no specific task)" (Task Context Selector).
- Subject:** A text box containing "Change Required for a resource on your project".
- Reply-to:** A text box containing "ron.walker@invoke.com.au".
- Send Notification To:** A list box with "Michael Little" and "Craig Pope", and an "All" checkbox.
- Reason for Notification:** A dropdown menu set to "Resource is over-allocated".
- Suggested Action:** A dropdown menu set to "Reduce the resource's allocation".
- Additional Information:** A large text area for notes.
- Buttons:** "Preview", "Send Notification", and "Cancel" at the bottom.

 Arrows on the right side of the dialog point to the "Period Selector", "Resource Summary", "Project Context Selector", and "Task Context Selector".

### How to send notifications to the Project Manager

1. Click the "Notify Project Manager" icon to open the Send Notification to Project Manager Window from the Resource List or View Resource page.
2. Use the Period Selector to specify the period of concern.
3. The resource summary information will automatically update to match the newly selected period.
4. Use the project and task context selectors to specify the context of resource's issue. If you select a specific project (as opposed to "All Projects") - the project manager will be automatically selected in the "Send Notification To" box.
5. Enter the subject of the email.
6. Update your reply-to email address, if required.
7. Select one or more project managers. Note: If you selected a specific project in the Project Context Selector, this field will be locked to the selected project's owner.
8. Select a Reason for Notification.
9. Select a Suggested Action. If you select "Other" you will need to elaborate in the text box that is subsequently displayed.
10. Enter any additional information, explaining the reason for the notification.
11. If you wish to preview your email prior to sending, click the Preview button to view the notification.
12. Click the Send button to send the notification.
13. A dialog box will be displayed asking how you want the email sent.

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- a. Send Immediately: - the email will be sent in the background within a few minutes.
- b. Queued and Sent normally: - the email will be stored in the email queue and will be sent the next time the Automatic Emails task is run (as configured by your Bijingo Administrator).

## 2.6 Swap work from one resource to another

The Swap Assignments tool allows Resource Managers to fully or partially swap remaining work from one resource to another. This tool can be accessed from the Swap Resources menu item in the left-hand menu, the Resource List page and on the View Assignment page.

### Functions

| Icon | Description   |
|------|---|
|      | <b>Find Resource</b><br>This opens the Find Resource Window to allow you to quickly view another resource's details. See the Find Resource Window section for more details. |
|      | <b>Switch Resources</b><br>This icon swaps resources from the left hand pane of the swap tool to the right hand pane.   |
|      | <b>Swap Assignment</b><br>This icon opens the Swap Assignment Window which allows you to swap the whole or partial selected assignment.                                     |
|      | <b>Swap All Assignments</b><br>This icon swaps 100% of all the assignments.   |
|      | <b>Undo Swap</b><br>This icon undoes the swap of the selected assignment.   |
|      | <b>Undo All Swaps</b><br>This icon undoes all swaps made.   |
|      | <b>Save Changes</b><br>This icon saves all swaps currently displayed on screen.   |

### How to Select Resources

1. To swap assignments - two resources must be specified. Depending on the method you used to come to the Swap Tool, some resources may or may not be already selected.
2. If none or only one resource is selected, then you will need to click the Find Resource icon to select the missing resource(s).

3. When you click Find Resource Icon, the Find Resource Window will be displayed. Select the desired resource in the window. For more information on using this window, see the Find Resource Window.
4. Assignments are always swapped from the resource on the left pane to the resource on the right pane. If you want to swap resources in the other direction, click the Switch Resource Icon to switch the resources between the left and right panes.
5. Note: If you have unsaved swapped assignments you must save your changes prior to changing resource(s).

## How to Change Which Tasks are Displayed

All non-completed assignments within the selected period will be displayed for both resources. Each task will display either remaining hours, planned allocation or remaining allocation in the task box.

1. Use the Project Filter to restrict the assignments displayed for the resource in the left pane.
2. Use the Display Filter to change what information is displayed in the tasks' boxes.
3. Change the Period Filter to change which tasks are displayed for both resources. When this filter is changed both panes will reload and only tasks that fall within the selected period will be displayed.

Note: If you have unsaved swapped assignments you must save your changes prior to changing the periods.

## How to Swap Work

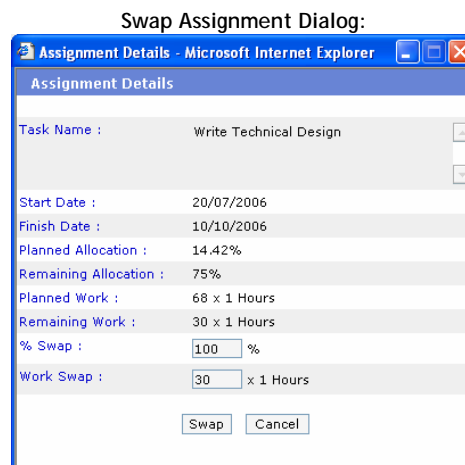
1. Select a task from the resource on the left and click the > button to open the swap assignment dialogue box.

Note: Assignments attached to projects that are "Sync Locked" will not be allowed to be swapped using this tool until the project lock is removed. See the Project Manager manual for more information about Sync Locked projects.

2. From the dialogue box, specify the "% Swap" or "Work Swap" as required and click the swap button.

If you select 100% or greater, the resource on the left pane will have no remaining work left on the assignment.

3. The amount of work specified will be swapped to the resource in the right pane.



## How to Swap all Remaining Work

1. To swap all remaining work from one resource to another click the >> button. This function will swap all remaining work, regardless of the selected period.
2. Click the Save Changes button to commit all changes. Read the how to undo swap section before committing changes.

## How to Undo a Swap

All swaps must be saved before they are committed. This allows the Resource manager the ability to reverse any swaps prior to pressing the Save Changes button.

1. To reverse a single swapped assignment:
  - a. Select the assignment to swap back
  - b. Click the < button.
  - c. The assignment swap is reversed.
2. To reverse all swapped assignments:
  - a. Click the << button.
  - b. All swaps are undone.

## How to Save Changes

1. Make all your desired swaps from the resource in the left pane to the right.
2. If you are satisfied with all your changes, click the Save Changes button to commit all changes.

## 2.7 Change assignment details

The Resource Manager can directly modify the assignments and tasks of resources that they are authorised for.

### How to Modify an Assignment

The Resource Manager can modify any of their authorised resources' assignments. For more details on modifying assignments see the Project Manager manual.

1. Open the View Resource page by selecting the View Resource Icon from the Resource List.
2. Select an assignment from either the "Assignments in Period" or "Total Assignments" tab.
3. Click the Edit Assignment Icon.
4. The Edit Assignment page will be displayed.
5. Make the desired changes.
6. Click the Save button.

### How to Modify a Task

The Resource Manager can modify any task that has one of their authorised resources assigned to it. For more details on modifying tasks see the Project Manager manual.

1. Open the View Resource page by selecting the View Resource Icon from the Resource List.
2. Select an assignment from either the "Assignments in Period" or "Total Assignments" tab.
3. Click the underlined task name.
4. The View Task page will be displayed.
5. Click the Edit Task Icon.
6. The Edit Task page will be displayed.
7. Make the desired changes to the task.
8. Press the Save button.

### How to Balance the Estimated Work

The Resource Manager can balance the estimated work of any assignment or task that has one of their authorised resources assigned to it. For more details on balancing estimated work see the Project Manager manual.

#### a. Balancing Task Estimated Work

1. Open the View Resource page by selecting the View Resource Icon from the Resource List.
2. Select an assignment from either the "Assignments in Period" or "Total Assignments" tab.
3. Click the underlined task name.
4. The View Task page will be displayed.
5. Click the Balance Estimated Icon.

#### b. Balancing Assignment Estimated Work

1. Open the View Resource page by selecting the View Resource Icon from the Resource List.
2. Select an assignment from either the "Assignments in Period" or "Total Assignments" tab.
3. Click the View Assignment Icon.
4. The View Assignment page will be displayed.
5. Click the Balance Estimated Icon.

## 2.8 Add Work to a Resource

The resource manager can add work directly to a resource either by assigning it to an existing task or by creating a new task if required.

The reasons a Resource Manager may do this include:

- identified a resource as being under allocated and assign the resource work to ensure that it being fully utilised.
- aware of a task that has been created, but does not currently have a resource currently assigned to it. The resource manager can assign the work directly to the resource without having to open the project and task.

**Add Work to Resource**

**Add Work to Project**

Resource : Cathy Smith  
Project : Dickson's Network Rollout

**Add Assignment to Existing Task (1 to 15 of 29)**

Search: [ ] Task [v] Date: [ ] [ ] [ ] to [ ] [ ] [ ] Group: 1 to 29 [v]  
Status: Not Complete [v] Priority: All [v] Comp: <= 100% [v] Submit Reset

|                   | Task                           | Priority | Comp | Status  | Start Date | Due Date   | Planned | Actual | Remaining |
|-------------------|--------------------------------|----------|------|---------|------------|------------|---------|--------|-----------|
| ▶ All   Outline ▲ |                                |          |      |         |            |            |         |        |           |
| ▶ 1               | <b>Top Phase</b>               | Medium   | 0 %  | Pending | 21/05/2007 | 20/07/2007 | 664.20  | 0.00   | 664.20    |
| ▶ 1.1             | <b>Analysis Phase</b>          | Medium   | 0 %  | Pending | 21/05/2007 | 25/05/2007 | 80.00   | 0.00   | 80.00     |
| ▶ 1.1.1           | Interview Client               | Medium   | 0 %  | Pending | 21/05/2007 | 25/05/2007 | 40.00   | 0.00   | 40.00     |
| ▶ 1.1.2           | Write Requirements Document    | Medium   | 0 %  | Pending | 21/05/2007 | 25/05/2007 | 40.00   | 0.00   | 40.00     |
| ▶ 1.1.3           | Signoff Requirements Document  | Medium   | 0 %  | Pending | 25/05/2007 | 25/05/2007 | 0.00    | 0.00   | 0.00      |
| ▶ 1.2             | <b>Functional Design Phase</b> | Medium   | 0 %  | Pending | 28/05/2007 | 01/06/2007 | 80.00   | 0.00   | 80.00     |
| ▶ 1.2.1           | Write Functional Design        | Medium   | 0 %  | Pending | 28/05/2007 | 31/05/2007 | 64.00   | 0.00   | 64.00     |
| ▶ 1.2.2           | Review Functional Design       | Medium   | 0 %  | Pending | 01/06/2007 | 01/06/2007 | 16.00   | 0.00   | 16.00     |
| ▶ 1.2.3           | Signoff Functional Design      | Medium   | 0 %  | Pending | 01/06/2007 | 01/06/2007 | 0.00    | 0.00   | 0.00      |
| ▶ 1.3             | <b>Technical Design Phase</b>  | Medium   | 0 %  | Pending | 04/06/2007 | 08/06/2007 | 80.00   | 0.00   | 80.00     |
| ▶ 1.3.1           | Write Technical Design         | Medium   | 0 %  | Pending | 04/06/2007 | 07/06/2007 | 64.00   | 0.00   | 64.00     |
| ▶ 1.3.2           | Review Technical Design        | Medium   | 0 %  | Pending | 08/06/2007 | 08/06/2007 | 16.00   | 0.00   | 16.00     |

### Functions

The following functions can be performed by selecting a task from the list.

| Icon | Description  |
|------|--|
|      | <b>Add Task</b><br>This opens the Add Task page to add a task to the currently selected project.                               |
|      | <b>Assign Work to Existing Task</b><br>This opens the Add Assignment page to assign the current resource to the selected task. |

### How to Add Work to a Resource

1. Select the resource you want to add work to by clicking on their selectors.
2. Click on the Add Work icon (from the action icons on the Resource List) to open the Add Work to Resource page.
3. Select the Project you want to add the resource to. The task list below will update based on the project selection made.
4. To add the resource to a new task:
  - i. Click the Add Icon.
  - ii. The Add Task page is displayed.
  - iii. Enter the details of the new task including the task name, description, start and due date, the allocation of the resource on the task and any dependencies.

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- iv. Press the Save button.
  - v. A new task is created and added to the project.
  - vi. See the Add Task section of the Project Manager manual for more details on assigning a resource to a new task.
5. To assign the resource to an existing task:
  - i. Select the desired task from the task list.
  - ii. Click the Assign Work to Existing Task Icon.
  - iii. The Add Assignment page is displayed.
  - iv. Allocate the desired amount of work to the resource
  - v. Press the Save button.
  - vi. See the Add Assignment section of the Project Manager manual for more details on assigning resources to tasks.
6. A Notification will be sent to the project owner notifying them of your changes to the resources on their project.
7. An entry will be made in the project journal detailing all of your changes to resources.

### 3. Resource Reports

A number of resource related reports have been added to the Resource Centre to support the Resource Manager. The Resource Manager can use their Resource Management Rights or any Reporting rights when running these reports.

- Assignment Detail Report
- Recorded Actuals Report
- Planned vs Actuals
- Planned Utilisation Report
- Remaining Utilisation

See the Reporting Manual for more information on these reports.



## 4 Implementing Resource Management Rights

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

### 1. **Select Resource Management Structure**

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



#### **Note**

It is strongly recommended that a Resource Breakdown Structure is used when implementing the Resource Management System as they naturally reflect the management of resources. Avoid using the Organisational, Work Breakdown or Skill Breakdown Structure if possible.

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

### 2. **Assign Resource Managers and Team Members to the Structure.**

The Administrator the must assign team member and resource manager roles to users within the resource management structure. See the example in this manual for details on assigning roles. (See the Codes and Structures Manual for more details)