Senior Executive 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!*

Senior Executive Manual

Bijingo Pty Ltd

Melbourne, Victoria

This manual covers version 3.0 of Bijingo

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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. The Senior Executive's Role

Senior Executive we have taken to mean any of the following:

- a senior manager from a Line Management perspective, eg Divisional GM
- a senior manager in a governance role (steering committee member)
- a senior manager with a significant interest, such as the project sponsor

Senior Executives, we assume, will have an interest in over viewing the project, contributing where needed and ensuring the project fits in with broader strategic objectives. They may consider the need for organisation standards, relationship with key suppliers and key customers, organisational risk, funding considerations, perceived roadblocks and reporting to the board.

Based on their needs outlined above they will interact with Bijingo, either directly or through a third party such as a personal assistant or project office representative, to obtain performance reports and forecasts both from a time and cost perspective. It is their expectation that data in Bijingo will be kept up to date and accurate and they will have a right to be displeased if they cannot get this information.

Bijingo provides the ability to map approval and reporting rights to unique users to ensure they have visibility of appropriate information. The Bijingo Administrator configures each user account with respect to their rights. The Senior Executive will need to determine whether they would wish to access Bijingo themselves or use an assistant, then provide that guidance to the Bijingo Administrator.

The role of the Senior Executive in Bijingo (or their assistant) is to view project performance data, extract reports and provide approvals (if configured for approvals).

Note

It is expected that this manual is read in conjunction with the IRC (Issues, Risks and Change Requests), Team Member and Reporting manuals. This manual in isolation will not provide the Senior Executive with sufficient information to work with Bijingo.

2. Projects

Senior Executives focus on Projects is usually to confirm in their own mind that the project is being managed well, that forecasts are accurate, that Risks are being managed and that Stakeholder expectations are being managed. In order to make this judgement they will discuss the project with key players and review project performance data on a regular basis.

2.1 Reviewing Projects

When reviewing projects, Senior Executives should focus on some of the key warning signs. From our experience they include:

- Unclear responsibility for delivery components
- Late or incomplete progress reports
- Progress reports which do not reflect reality (sanity check by asking around)
- Issues and Risks which once raised never seem to be resolved
- Excessive Changes to scope or no Scope change process in place
- Conflict with suppliers and/or within project team
- Cost and/or Schedule forecasts which are overly optimistic, never change or change dramatically week to week
- Cost and Schedule baseline and forecasts not including risk
- Schedule and Cost baseline not covering full scope or focusing too heavily on one area of the project

2.2 Project Approvals

In addition to the Standard Lifecycle, Bijingo allows organisations the option to implement a project approval process where all new projects must be approved by a senior manager (user who has been granted Authorisation Rights). If the process is enabled, all new projects will have a status of “New” and must be approved before they become Pending. If the process is not enabled, all new projects will have a status of Pending and the Approval process is bypassed.

For the Approval Process to be active, Project Approvals will need to be enabled in the Bijingo Settings page (Refer to the Administration Manual for more details).

Authorisation Rights

Authorisation Rights are assigned the same way Reporting Rights are assigned (refer to the Coding & Reporting Structures Manual and Administrator Manual for more details). Only users with the appropriate Authorisation Rights can authorise projects. To have appropriate Authorisation Rights, a user must be assigned Authorisation rights to a position in the Organisation Reporting Structure by the Bijingo Administrator. Once assigned, the User will have authorisation privileges for any projects which are associated with that position or any position directly below.

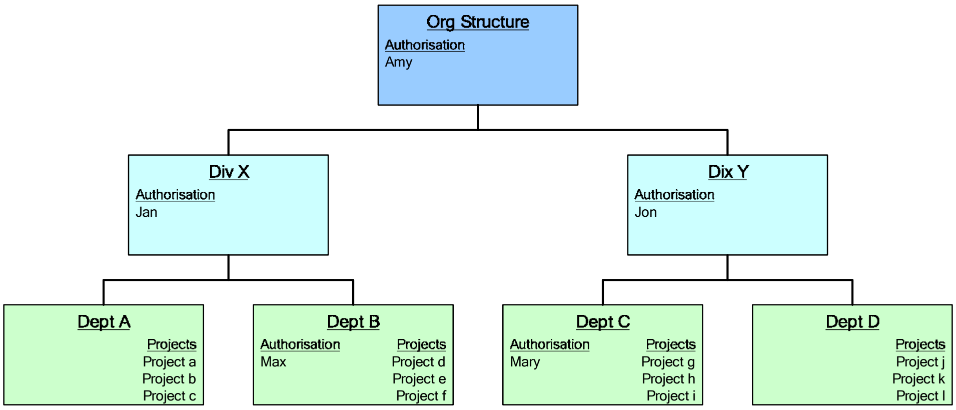

Figure 1: Authorisation Hierarchy

For example, Mary has been assigned Authorisation rights for Dept C. Dept C is running Projects g, h and i. Mary will have authorisation rights only over these projects. Jon has been assigned Authorisation rights at Div Y, which means that he can approve all projects assigned to Dix Y and Dept C and D. Amy has been assigned Authorisation Rights at the Root, which gives her permission to Authorise any project in the organisation.

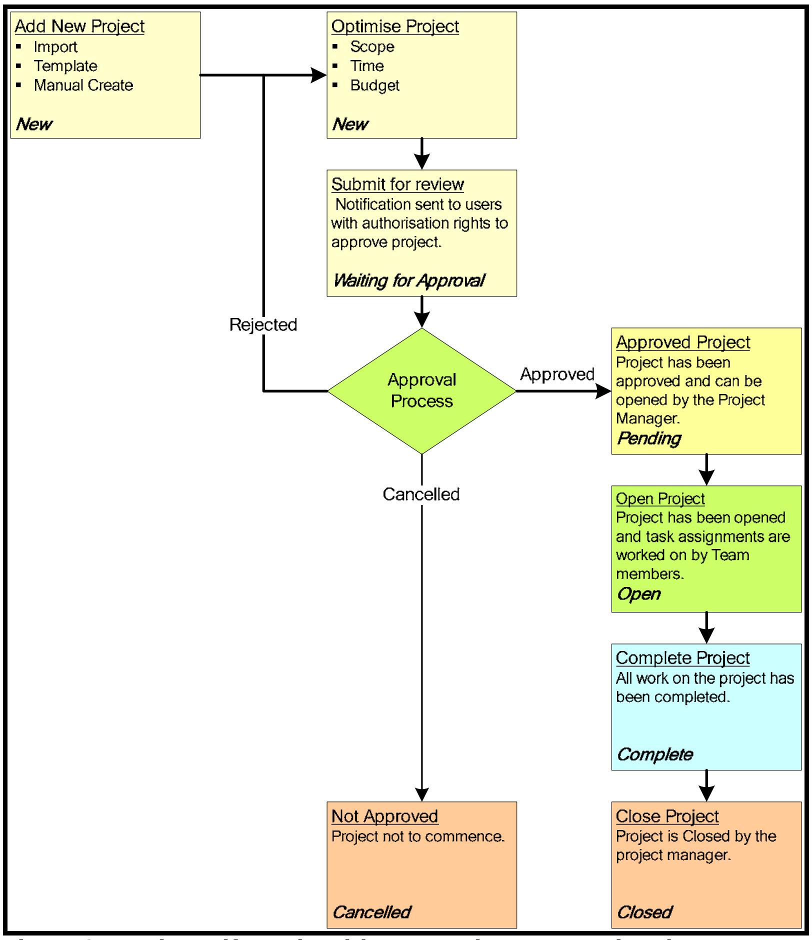

Figure 2: Project Life cycle with Approval Process actiated

Projects Waiting For Approval

Users who are authorised to approve projects are notified by email when a project has been submitted. When they log into Bijingo, a Project Approvals section is displayed on their home page, listing any projects that require approval. Projects waiting for approval are also listed in the Projects List. They can be viewed by clicking on the Project icon on the Navigation bar and selecting the Waiting For Approval option on the Filter.

a. **Projects List (Waiting for Approval)**

The Project list containing Projects Waiting For Approval is accessed from the Home Page. The user must have Authorisation rights to see Project Approvals.

Home page showing Projects waiting for approval

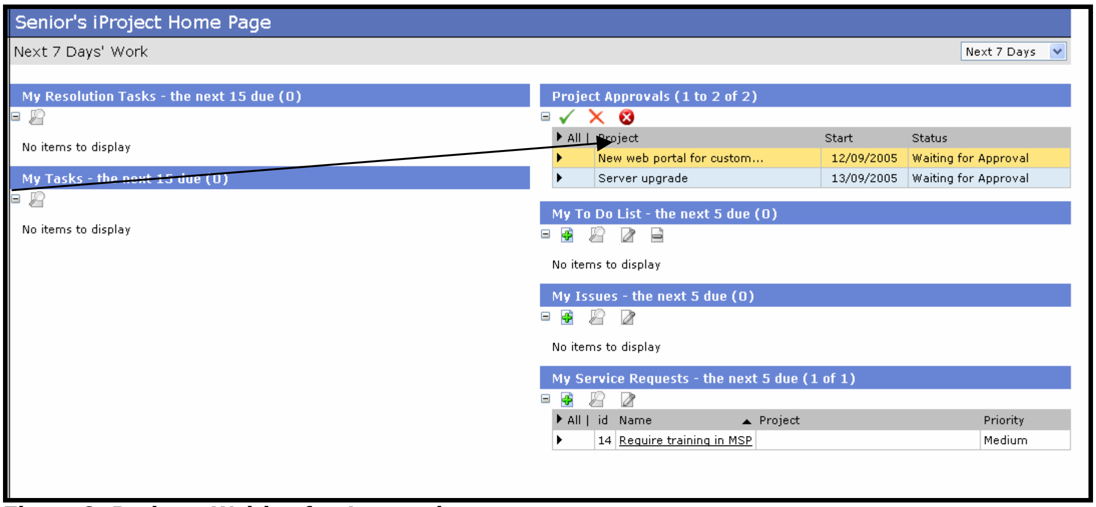

Figure 3: Projects Waiting for Approval

b. **Actions**

The following actions can be performed on Projects Waiting for Approval

Icon	Description
	Approve Project Select the project and then Click the Approve icon to Approve the selected Project. The status of the Project is set to “Pending”. The Project Manager can then open and proceed with the Project.
	Reject Project Select the project and then Click the Reject icon to Reject the selected Project. The status of the Project remains “New”. The Project Manager is sent a notification indicating the project has been rejected. They can then modify the project and resubmit for approval at a later stage.
	Cancel Project Click the Cancel icon to Cancel the selected Project. The status of the Project is set to “Cancelled” and it is listed on the archive project list. Cancel project is used where a project is no longer required not to reject a project.

How to Approve a Project

1. Select the project to be approved from the list of Projects Waiting for Approval.
2. Click the Approve icon to approve the project.

How to Reject a Project

1. Select the project to be rejected from the list of Projects Waiting for Approval.
2. Click the Reject icon to reject the project.
3. A Reject Project confirmation window opens.

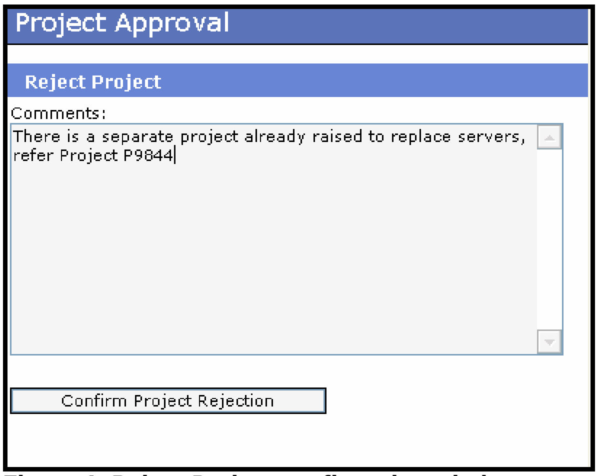

Figure 4: Reject Project confirmation window

3. Enter the Reason for Rejecting the Projects in the Comments field
4. Click the Confirm Project Rejection button to reject the project. The project's status is reverted to new (allowing it to be resubmitted in the future) and the project manager is notified.

How to Cancel a Project

1. Select the project to be cancelled from the list of Projects Waiting for Approval.
2. Click the Cancel icon to Cancel the selected Project. The status of the Project is set to "Cancelled" and it is listed on the inactive project list.

3. Issues, Risks & Changes

Senior Executives have the ability (as per team Members) to raise Issues and Service Requests. Service Requests are like Issues but at an organisational level whereas Issues are Project and/or task specific. Issues and Service Requests are addressed by Project Managers through Action Plans, either as a Resolution plan (including associated Tasks) or a Change Request. Change Requests result in a Change Request Plan, either as one or more Tasks or in one or more Projects.

Realistically Senior Executives will request reports from the Project Office on summary performance data across projects as well as key Risks and Change Requests on key projects of interest.

3.1 Reviewing Issues & Risks

When reviewing Issues, Senior executives should focus on those seen as a high priority and those where the Action Plans do no appear to be progressing. Senior Executives should also look for areas where Issues have arisen which really should have been identified earlier as Risks. They should also encourage the project team to not just raise Issues but come up with resolution options. Issues requiring escalation should be clearly identified along with exactly what is required of the Senior Executive.

When reviewing Risks, Senior Executives should ensure that schedule and cost estimates include a realistic Risk budget. They should ensure Action Plans are in place to reduce probability of occurrence or reduce impact. Any Risk which is being accepted by the project should be clearly identified along with appropriate Impact and Contingency plans in place.

Refer the IRC Manual for more details.

Warning signs

No Risks or only minor risks identified

No clear Action plans obvious

Risk log never changes week to week

Risk log being sanitised (missing an obvious risk)

Issues being raised which were never raised as Risks

Escalation requirements not clearly stated

Schedule and Cost baseline and forecast unclear as to whether risk is included

3.2 Reviewing Change Requests

Change Requests focus on change in scope, as such they need to be treated as little Business Cases and need to be approved an authorised person (who may be representing a steering committee). They must identify scope of change, impact of change, feasibility of change both financially and commercially as well as consequential change considerations (eg contracts, documents, plans).

The Project Manager will raise a Change Request on behalf of the project team or stakeholders directly, or in response to an Issue, Risk, Client request or Service request. Change Requests include the associated Action plan(s), which have Task(s) and/or Project(s) attached. These Action Plans capture additional scope which remains in the status of “New” or unauthorised until approval is given and status is changed to “Pending” or “Open”.

Note

Bijingo does not automate the Change request approval process, it requires manual intervention by the Project Manager using the status field.

Refer the IRC Manual for more details.

3.3 Reviewing Client and Service Requests

Client and Service Requests are kept separate from Change Requests so they may be reviewed and validated before a Change Request is raised and they are formalised. They are dealt with in Bijingo in a very similar way but in reality are treated quite differently in that the human interaction must be carefully managed.

Refer the IRC Manual for more details.

4. Reports

Bijingo provides extensive and almost unlimited report capability. There are extensive functions for preparing customised reports as well as the ability to save a particular report format for future reporting. Senior Executives (unless they are technically minded) are unlikely to extract their own reports. They are more likely to work with the Project Office, or suitably capable person, to define their report standards.

4.1 Preparation of reports

Refer Reporting manual for more details.

4.2 Standards

Each organisation will prepare their own standard reporting suite. Most likely this suite will include:

Report	Description
Status report:	Summary status report per project including text based data from the Project Log
IRC report:	Summary report of Issues, Risks, Change requests, Client requests and Service requests (may be filtered by IRC item and/or status)
Summary schedule report:	Summarised performance report for all projects across organisation (or for a select program)
Milestone report:	Filtered view of key milestones indicating progress
Detailed schedule report:	Full listing of tasks, phases and milestones (may be filtered for remaining work only or for selected group/division)
Detailed cost report:	Full listing of cost items, including tasks and IRC items as well as expenses and income.
Task Achievement report:	Completed tasks and milestones during reporting period
Task Exception report:	Tasks and milestones not completed during reporting period but should have been
Task Near term look ahead:	Tasks and milestones due for completion during the next reporting period
Near term Assignments report:	Who is doing what during the next reporting period

Senior Executives should where possible choose standard reports and avoid ad-hoc reporting as it takes the Project Office some time to prepare ad-hoc reports and that is time not spent analysing data.