TECHNICAL SERIES

RESOURCE MANAGEMENT DETAILED PLANNING

Original Software

J MCDOUGALL

SEPTEMBER 2021

BERTIE

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SYNOPSIS

Resource management requires additional configuration to set up, we have detailed planning where we know the resource we will be allocating work to. This allows us to monitor the work allocated to a resource and show when he is over or under-allocated work based on his work availability.

The resource that is allocated work can record his time spent on a task, this allows a real-time view of the progress of work within Qualify.

We also have role-based resource management, this document will only describe the Detailed planning Resource Management.

RESOURCE MANAGEMENT

With Resource Management we can monitor a piece of work that is allocated to a user, we can specify when the work should be completed, for example, a certain day, week or customisable selection. This is then measured against the users available hours to determine if they have an under or over-allocated workload.

The resource management can also be configured to allow the user to record 'time spent against a piece of work. This can be viewed in real-time to determine if the work is on schedule.

Configuring the Application to Utilise Resource Management

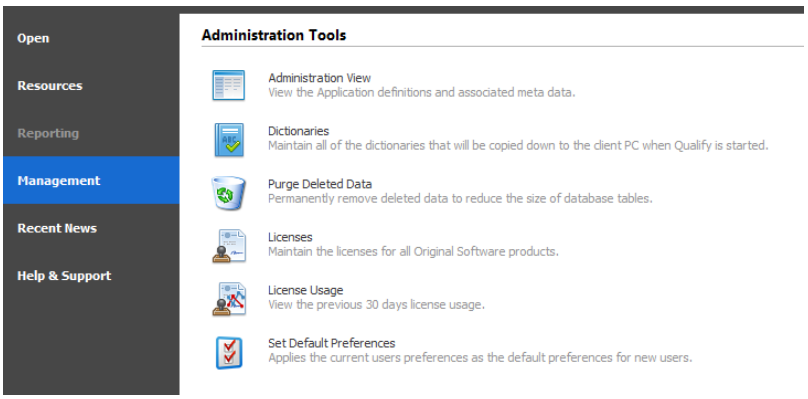
We will need to configure the users working hours then the Entiry that will be the piece of work that is allocated to a user. In this example, we will use a simple Entity called 'Task' however you can have multiple Entities using Resource Management which can be more complex to fit in with your processes. In this example, I am using a very simple model to demonstrate the capabilities.

CONFIGURING WORKING HOURS

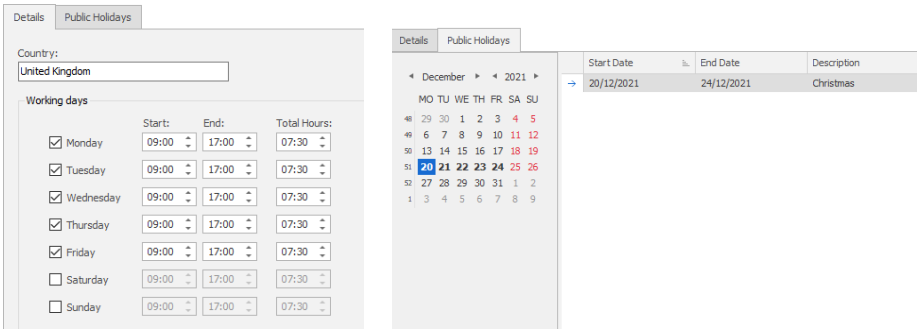
We will need to set the working hours for each Resource, this can be set at the Country Level or the individual level.

Setting up Country Working hours

1. Logging in to Qualify as the Administrator or as a user with the required permissions
2. From the front screen, select 'Management' from the left-hand menu followed by 'Administration View'

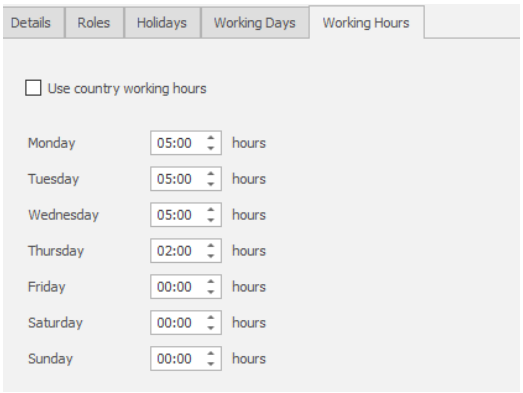


3. From the 'Administration View' select Countries, by default, you will have 'United Kingdom and 'United States. If you wish you can create further countries, for example having a country record for each Office, job title or type of worker will allow you to share Working hours and holidays.
4. By editing a Country record, you can set Working Hours and Public Holidays.

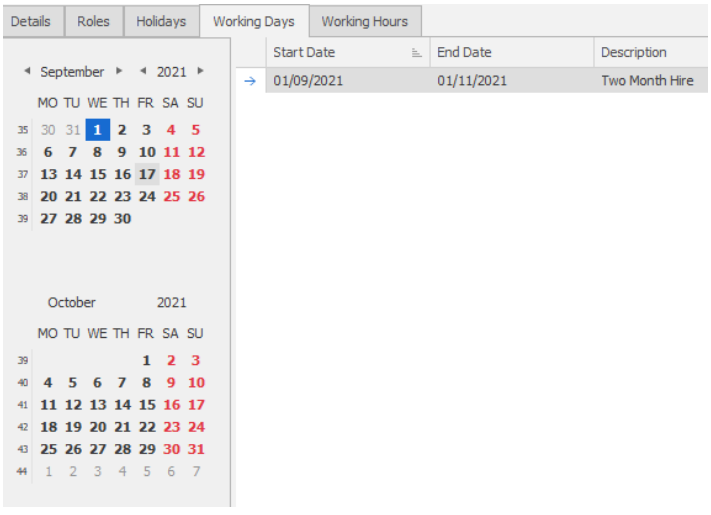


Setting up a Resource

1. Logging in to Qualify as the Administrator or as a user with the required permissions
2. From the front screen select ‘Resources’ followed by editing the Resource.
3. From the ‘Working Hours’ Tab, you can either have the ‘Use Country Hours’ checkbox selected, or enter the users individual hours.



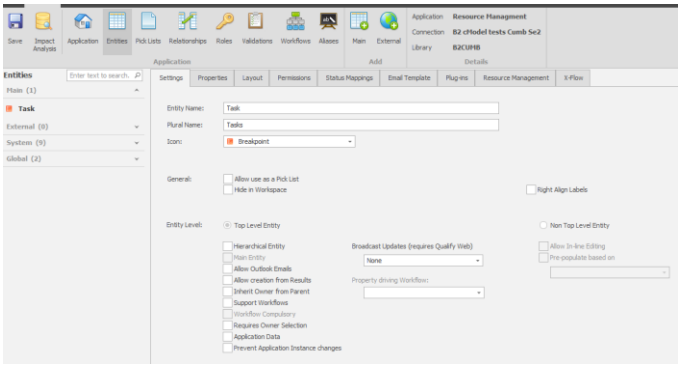
4. If you not using the Country hours, you will need to select Working Days and create the availability of the resources.



CONFIGURING THE TASK ENTITY

The Task Entity is the Entity that will be allocated to a resource to complete a piece of work.

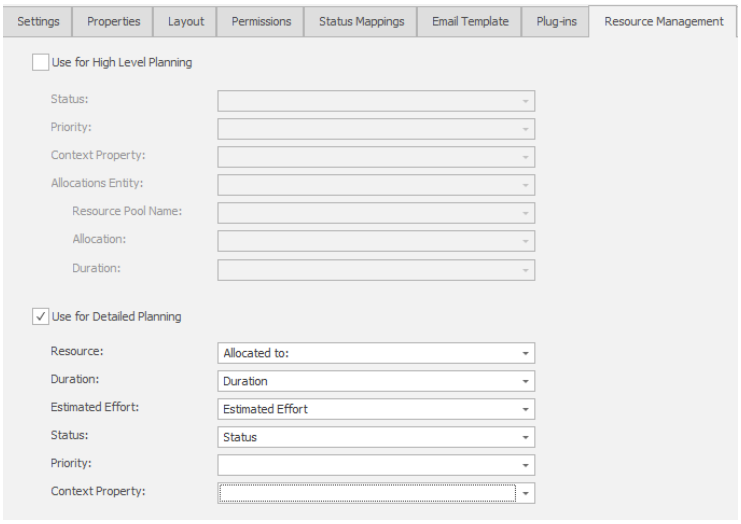
1. Logging in to Qualify as the Administrator or as a user with the required permissions
2. Edit the Application definition, select 'Entries from the top ribbon bar and select the
3. Entity you wish to use.



4. Under the Properties you will need the following items:
    a. **Resource Property:** This will be the Qualify Resource you are going to allocate the work to. Select the 'Use In Planning' tick box
    b. **Duration Property:** This is used as the timeframe the resource has to complete the work. The piece of work may take five hours, however, it is scheduled to be completed within the 2nd week of October, this is the function this property takes.
    c. **Integer Property:** This is used for the Estimated Effort, the property should be configured as the format time and the default units as hours or minutes depending on your preference.
    d. **Single Value Select:** This is used as the status of the task, the 'Status' of the selection will control when the task appears in the Resource Management calculations.

	Value	Status	Active
→	Not Ready	Closed	☑
	Ready	Open	☑
	Completed	Closed	☑
*			☐

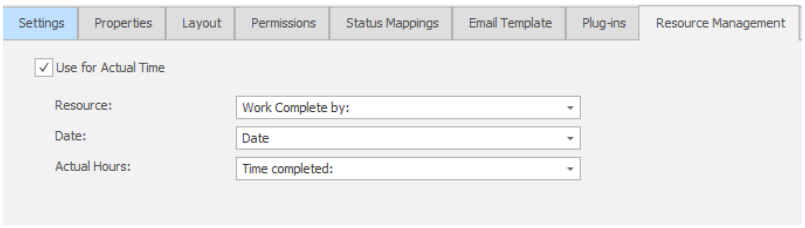
5. Optional Properties for Resource Management
    a. **Integer Property:** Set with the numeric format, this is used to hold the priority of the task.
6. From the Resource Management Tab, check the 'Use for Detailed Planning' check box and populate the required fields.


Settings
Properties
Layout
Permissions
Status Mappings
Email Template
Plug-ins
Resource Management
Use for High Level Planning
Status:
Priority:
Context Property:
Allocations Entity:
Resource Pool Name:
Allocation:
Duration:
Use for Detailed Planning
Resource:
Allocated to:
Duration:
Duration
Estimated Effort:
Estimated Effort
Status:
Status
Priority:
Context Property:

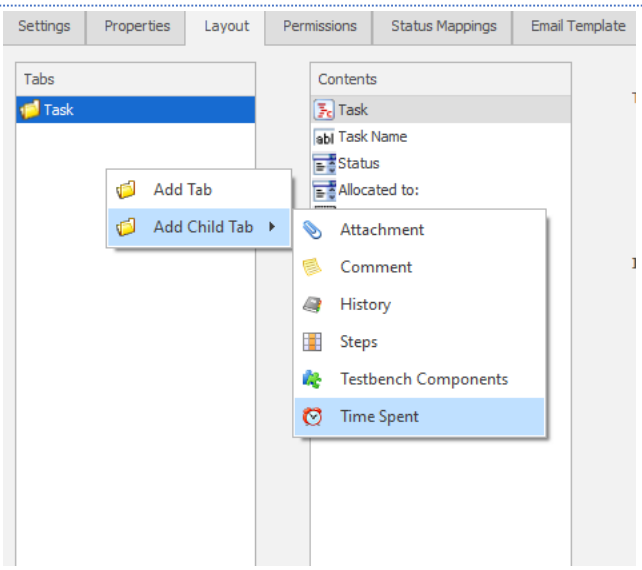
CONFIGURING THE TIME ENTIRY

The time entity if used allows the person assigned the piece of work to record time spent completing it. The time recoded will then be displayed in the Resource Management so the completed work or part off can be viewed in real-time. This is however not required, you can have the monitoring of the allocation without the time recording if desired.

1. Create a new Entity, select this as a 'Non-Top Level' Entity
2. Under Properties create the following, all as required properties.
    a. **Resource Property:** This will be used to record the person recording the time, setting the default to <Me> will automatically populate this with the logged in users details.
    b. **Datetime Property:** This will be used to record the date/time the work was completed, select the desired Format and select 'Today as Default. This will then automatically populate today's date.
    c. **Integer:** Set as the format 'Time' and the default units as minutes or hours as desired
3. From the Resource Management tab, select 'Use for Actual time' and populate with the properties just created.



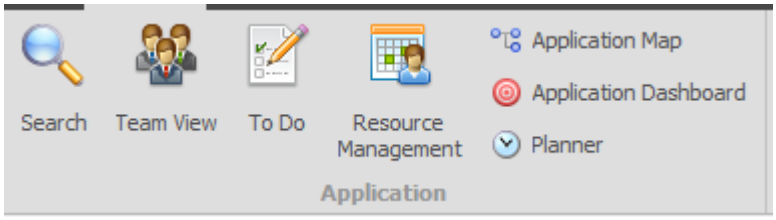
4. Within the Task entity, select the Layout tab, right Mouse click in the Tabs area and select 'Add Child Tab' and select the 'Non-Top Level Entity' we just created.


Settings
Properties
Layout
Permissions
Status Mappings
Email Template
Tabs
Task
Contents
Task
Task Name
Status
Allocated to:
Add Tab
Add Child Tab
Attachment
Comment
History
Steps
Testbench Components
Time Spent

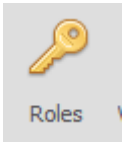
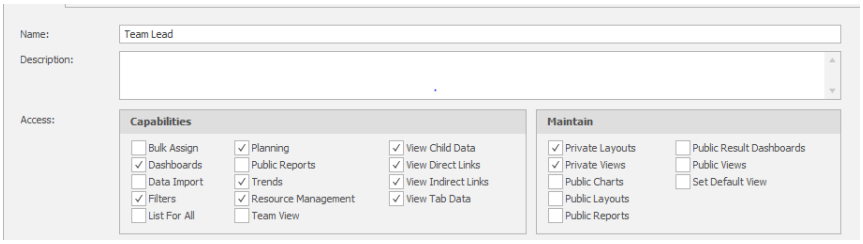
CONFIGURING RESOURCE MANAGEMENT SECURITY

The Resource Management screen can be accessed from the Qualify Client, from the top ribbon bar if the user has permission they can access the functionality by selecting the icon.

The planner screen can be accessed by selecting the 'Planner' menu item.



To configure the permissions

1. Login to the model as the administrator or a user with permissions.
2. Select Roles from the top ribbon bar.
3. 

4. Select the Role you wish to allocate the functionality to, check the 'Resource Management' checkbox.