Associated Engineering

Resource Utilization User Guide

JSON Bourne

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USER ROLES



Upon logging in with Azure credentials, users will view their personal profile. They will be able to edit their profile from this view.

Admin users will have options in their sidebar to navigate to Users, Projects and Admin options. Admin users are able to:

- View and edit any user/resource profile
- View and edit any project
- Create and delete any project
- Assign, unassign, and confirm resources to a project
- Add and remove disciplines, skills, provinces and cities



<u>Regular users (resources)</u> will only be able to view & edit their own profile, view the projects to which they are assigned, and view the profiles of project teammates.



Json Bourne

Utilization: 11

Location: Fort McMurray, Alberta

Discipline & Skills

1 Military engineering Experience: 10+

Current Projects

1 Abandoned Steady Parachute

Position: Military engineering
Hours Committed this Month: 20

Unavailability

This resource does not have any unavailabilities.

USERS

I. EDIT USER PROFILE



Welcome, Natasha!

Natasha Romanova

Utilization: 0

Location: Fort McMurray, Alberta

Discipline & Skills

1 Biological engineering Experience: 10+

Current Projects

1 Nikki's Test

Position: Project Manager

2 Jackie's Project Test

Position: Project Manager

Unavailability

This resource does not have any unavailabilities.

Select the edit button to enter the Edit User Profile page

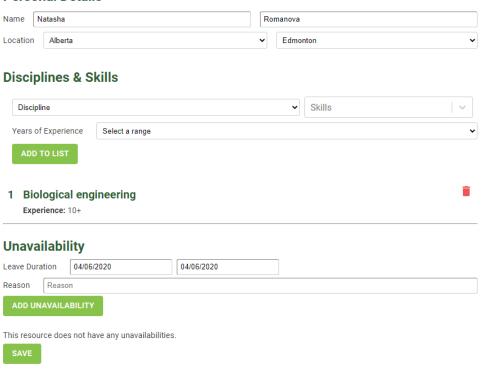
In the Edit User page, users will be able to edit their personal details, disciplines & skills and their unavailability dates.

NOTE: Exiting the Edit User page before selecting the Save button at the bottom of the page will discard any changes made.



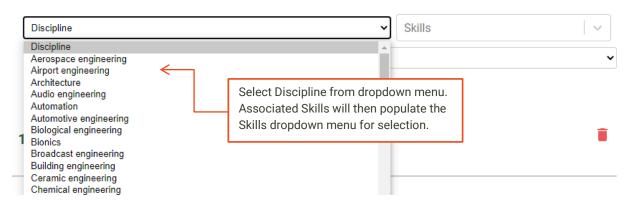
Edit user

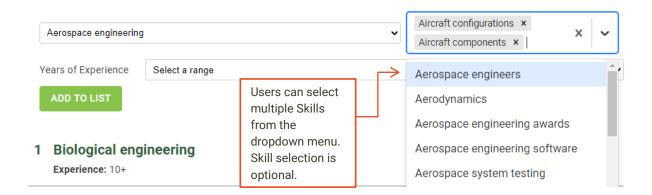
Personal Details

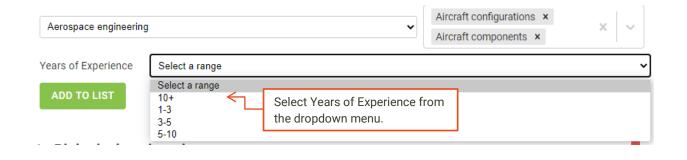


A. ADD DISCIPLINE & SKILLS

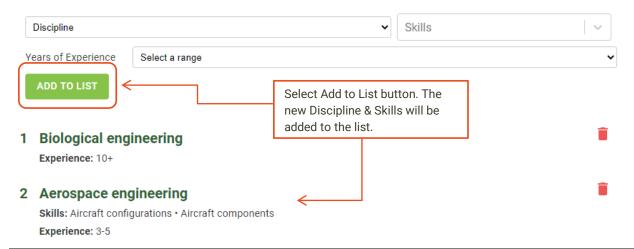
Disciplines & Skills







Disciplines & Skills



B. DELETING A DISCIPLINE & SKILLS

1 Biological engineering

Experience: 10+

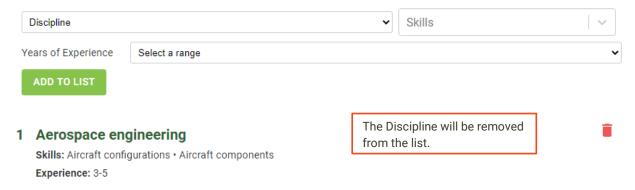
Select the trash can icon on the right of the Discipline that will be deleted.

2 Aerospace engineering

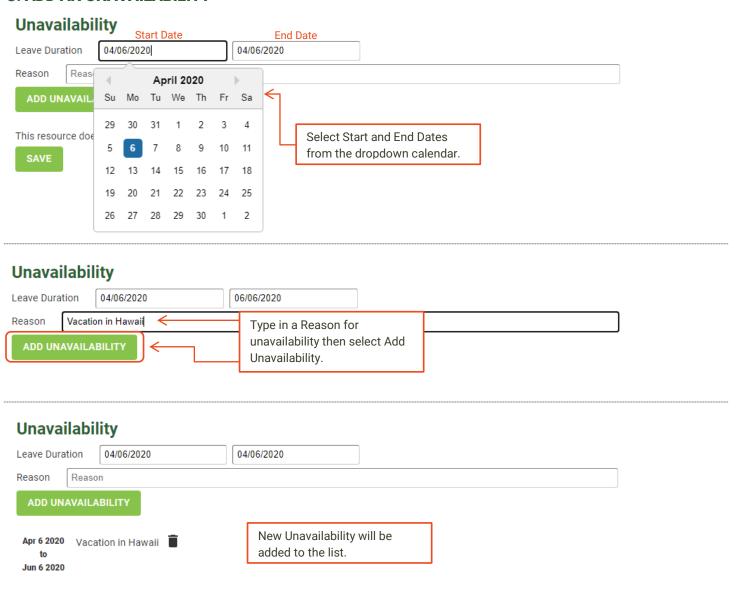
Skills: Aircraft configurations · Aircraft components

Experience: 3-5

Disciplines & Skills



C. ADD AN UNAVAILABILITY

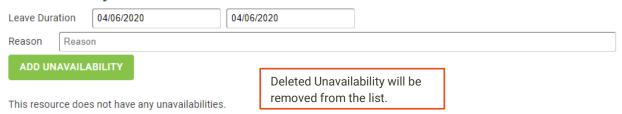


D. DELETE AN UNAVAILABILITY

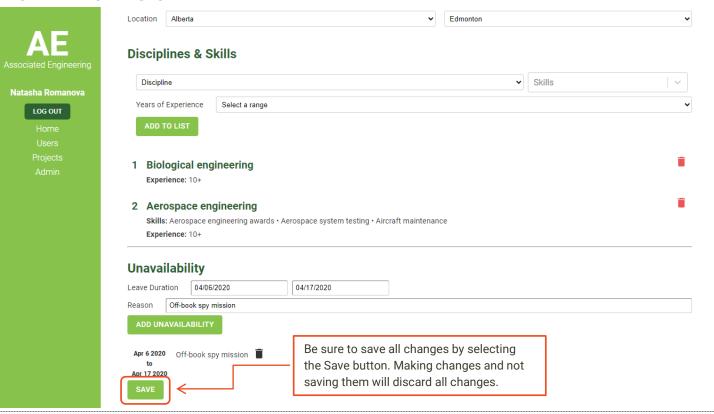
Unavailability

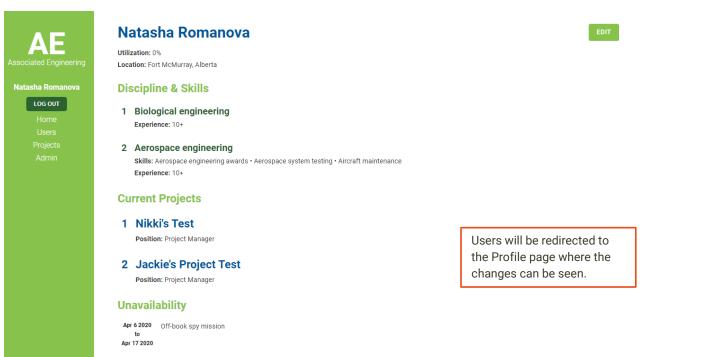


Unavailability

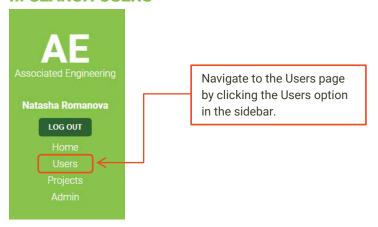


E. SAVE ALL CHANGES

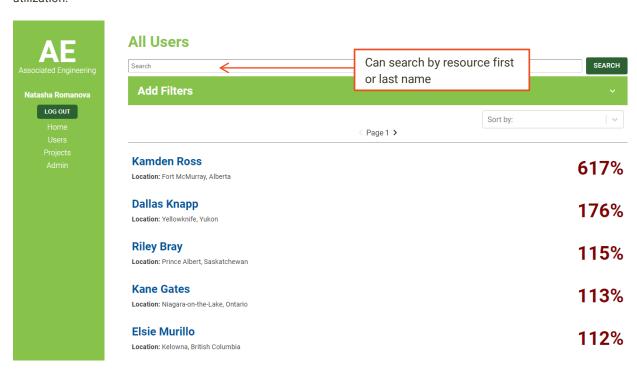




II. SEARCH USERS

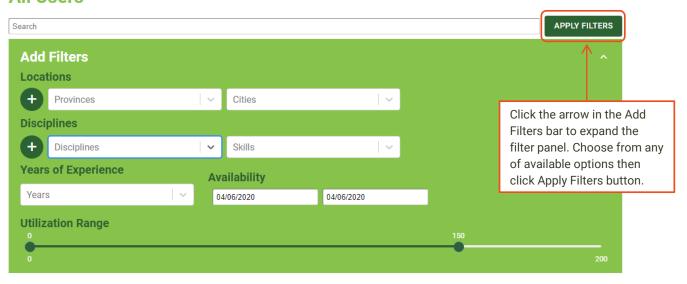


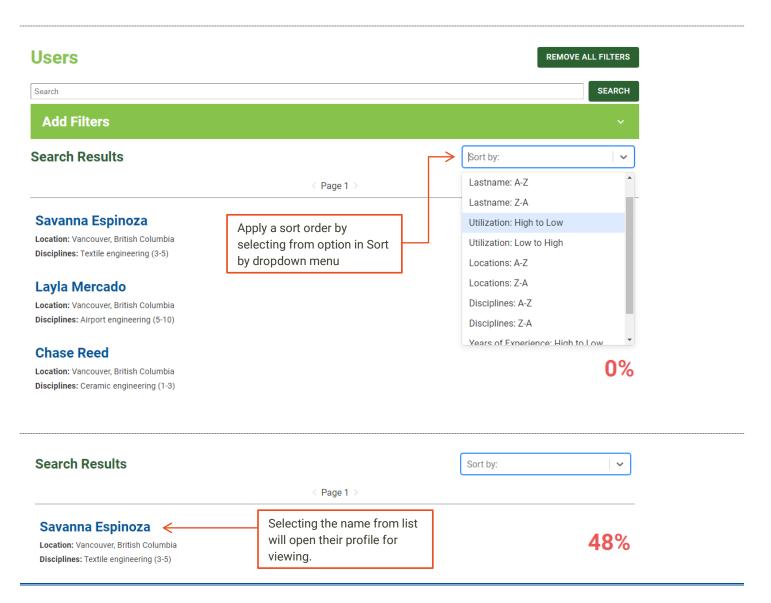
Users will be taken to the All Users page which lists all resources in the system. By default, the list is sorted in descending order of utilization.





All Users



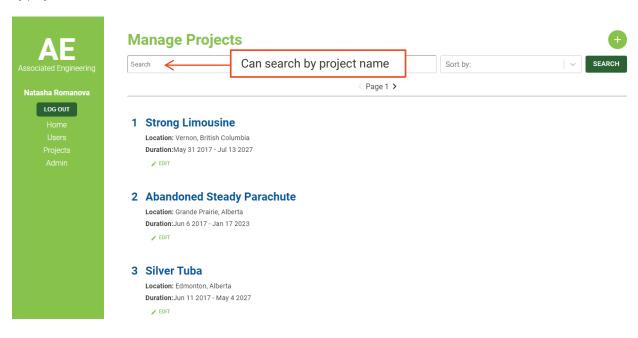


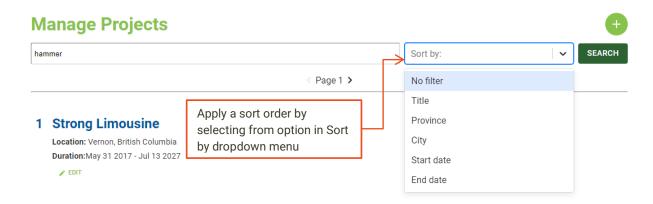
PROJECTS

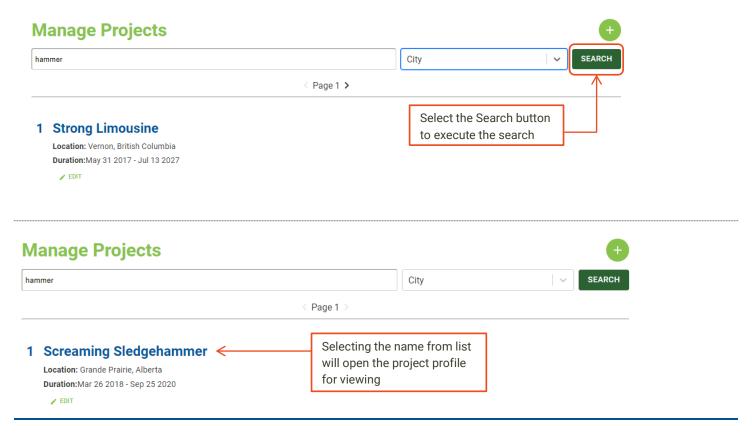
I. SEARCH PROJECTS



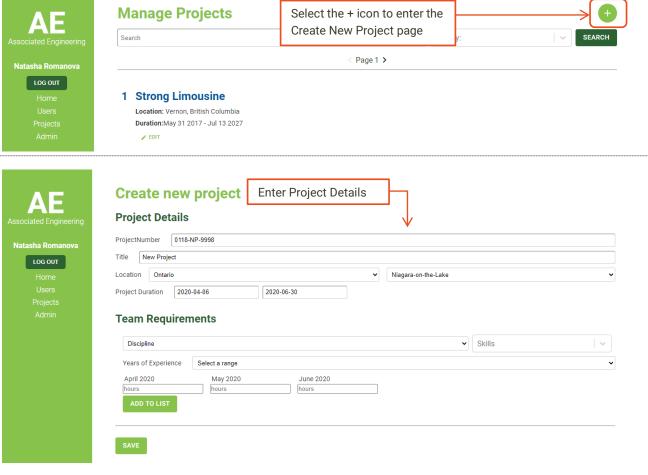
Users will be taken the Manage Projects page which lists all the projects in the system. By default, the list is sorted in ascending order by project start date.



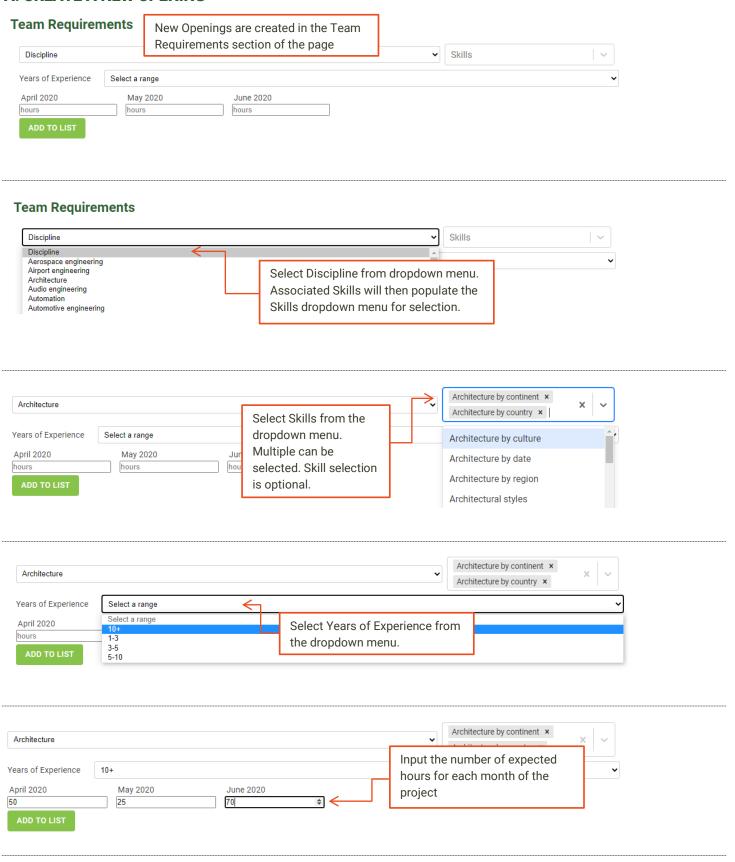


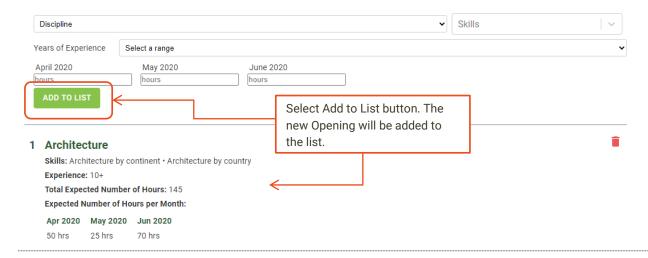


II. CREATE PROJECT

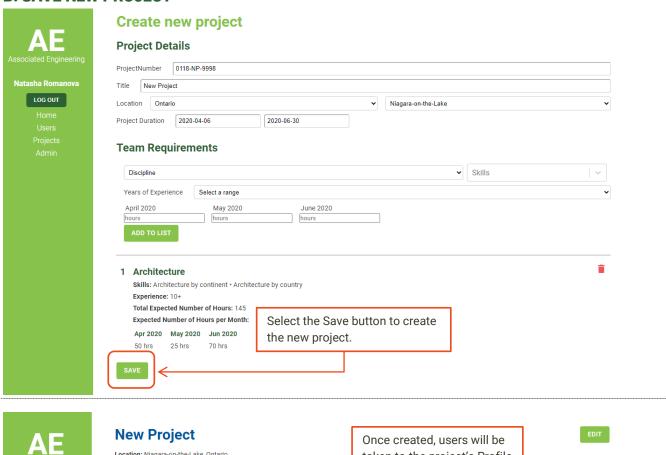


A. CREATE A NEW OPENING



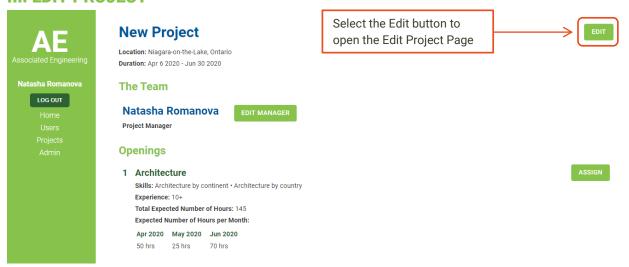


B. SAVE NEW PROJECT



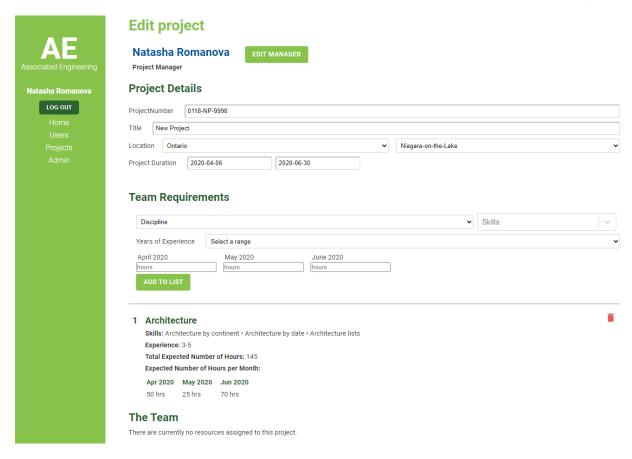


III. EDIT PROJECT



In the Edit Project page, users will be able to edit the project's details, add/remove openings, reassign project to a new project manager, and delete the project.

NOTE: Exiting the Edit Profile page before selecting the Save button at the bottom of the page will discard any changes made.

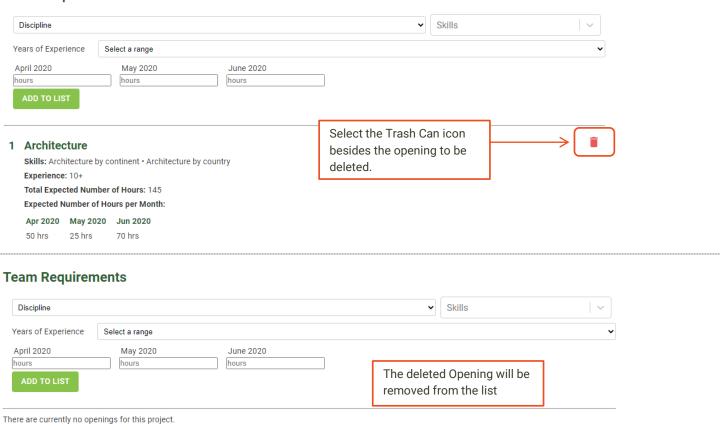


A. CREATE A NEW OPENING

The steps to create a new opening is the same as when the project is being created. View those steps here.

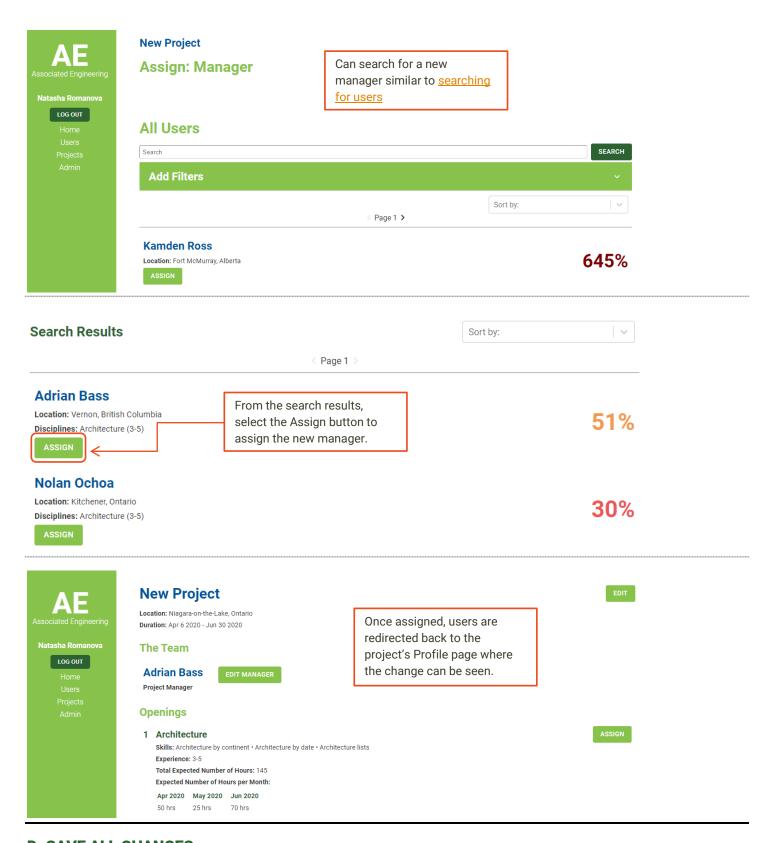
B. DELETE AN OPENING

Team Requirements



C. CHANGE PROJECT MANAGER





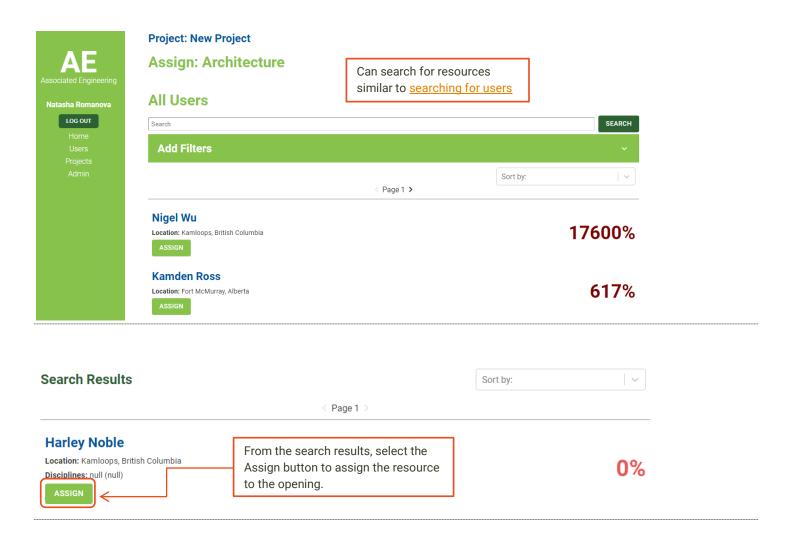
D. SAVE ALL CHANGES

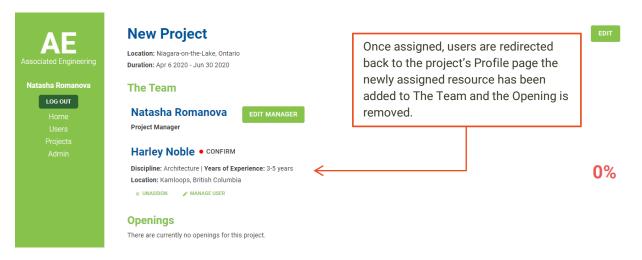


Be sure to save all changes by selecting the Save button. Making changes and not saving them will discard all changes.

IV. ASSIGN A RESOURCE

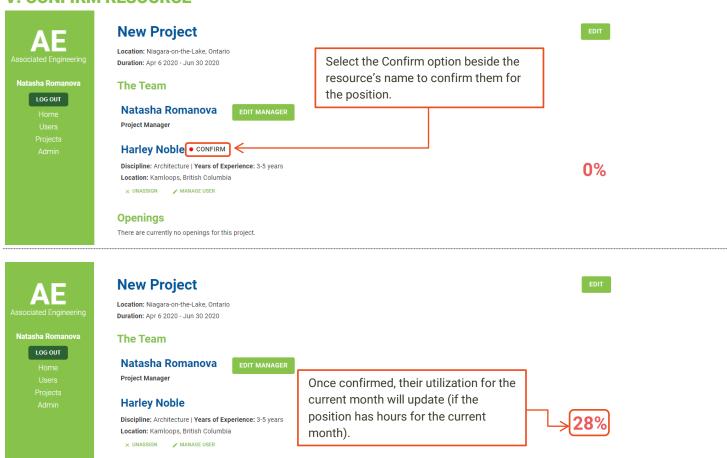




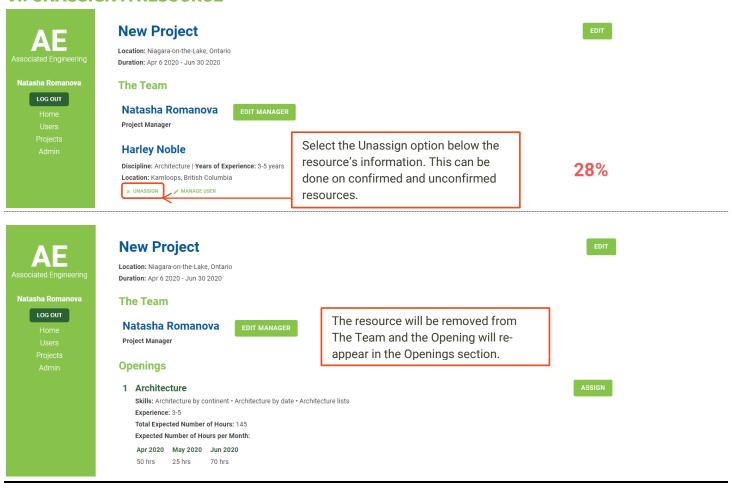


NOTE: the resource's utilization is not updated until they have been confirmed for the position.

V. CONFIRM RESOURCE

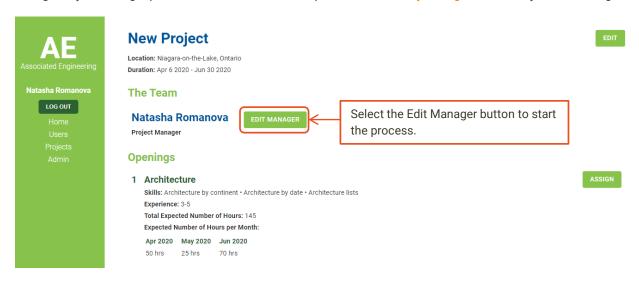


VI. UNASSIGN A RESOURCE



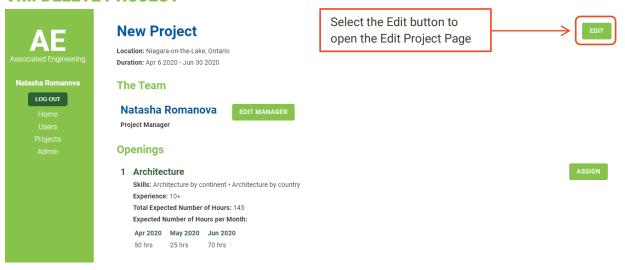
VII. CHANGE PROJECT MANAGER

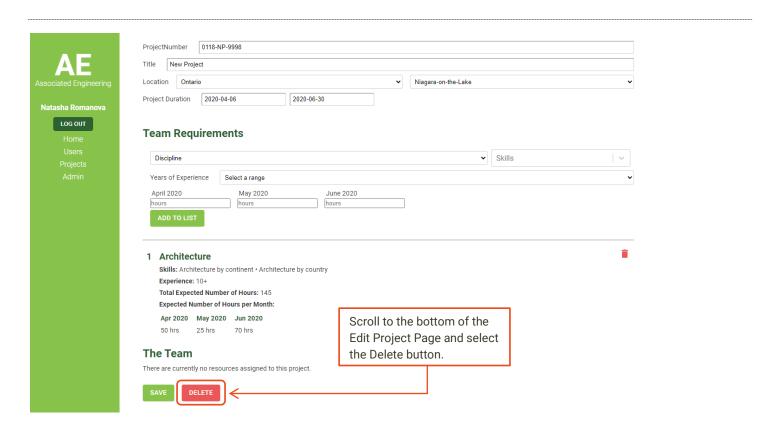
Change Project Manager process can be initiated in two places: the Edit Project Page and the Project Profile Page.



The remaining steps are the same as starting from the Edit Project Page. View those steps here.

VIII. DELETE PROJECT



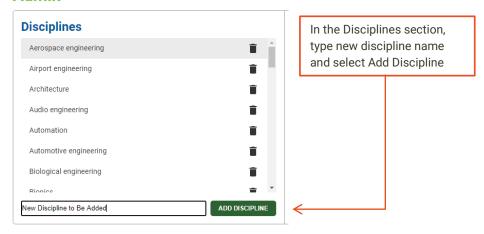


ADMIN



I. ADD DISCIPLINE

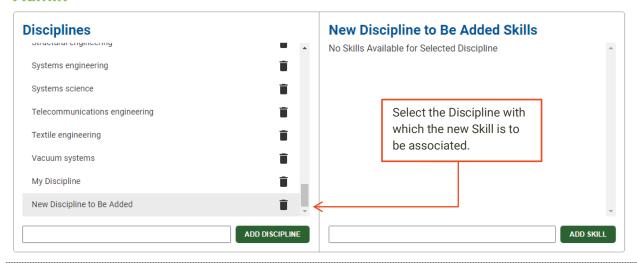
Admin



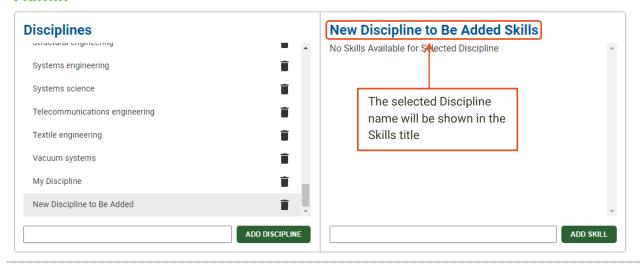
NOTE: disciplines must have unique names. If the discipline already exists in the list, an error message will be given.

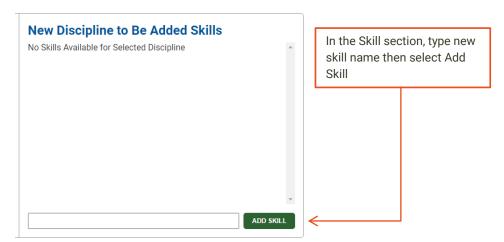
II. ADD SKILL

Admin



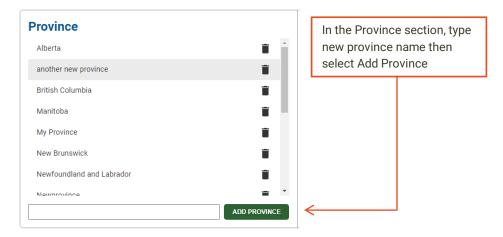
Admin





NOTE: the combination of discipline name and skill name must be unique. If the skill is already associated with the discipline, an error message will be given.

III. ADD PROVINCE

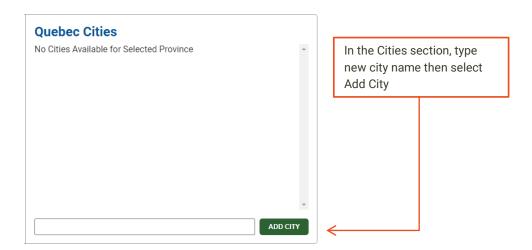


NOTE: provinces must have unique names. If the province already exists in the list, an error message will be given.

IV. ADD CITY



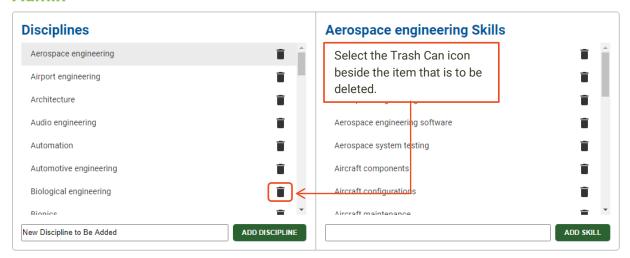




NOTE: the combination of province name and city name must be unique. If the city is already associated with the province, an error message will be given.

V. DELETE DISCIPLINE, SKILL, PROVINCE, OR CITY

Admin



NOTE: if the item is currently in-use, i.e. assigned to a resource or project, it may not be deleted and an attempt to delete will return an error message.

NOTE: provinces and disciplines may not be deleted is they have associated cities and skills respectively. An attempt to delete will return an error message.