



Resource groups and allocating employees

An overview for project managers

The full overview

The significance of correct allocations

Gain an overview of the significance of resource allocation, and how employees are assigned access to register time at various hourly rates in TimeLog Project.





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Written by Simon Ravn
Joensen

TimeLog A/S
Alhambravej 5
1826 Frederiksberg
Denmark
Phone +45 70 200 645

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www.timelog.com
support@timeloa.com





1 Introduction

This document describes TimeLog Project's functionality regarding resource groups and allocating employees. This document is geared towards project managers, who would like an overview of the significance of employee allocation, and what options TimeLog Project offers – either on a high or low level of detail – to assign access to employees to register time and define hourly rates.

This document consists of two parts:

1. Resource groups: An introduction to resource groups and their usage
2. Employee allocation: A detailed description of how employees are allocated to projects and how hourly rates for each allocation are determined.

2 Resource groups

A resource group of one or more employees can be created for each project. The resource group is the group of employees that will work on the project, and is created under the **Resource group** tab.

The primary purpose of resource groups is to:

- Allow access to time registration on a high level at the correct rate
- Streamline the allocation of employees to individual tasks

2.1 Access to time registration at a high level

With resource groups, projects are staffed by just selecting the employees to add to the resource group.

For each project, it is possible to state that time registration is permitted for the resource group's members. By choosing this setting and connecting the resource group with an hourly rate for each employee, you can quickly and effectively give the group's members access to time registration on every project's task and at the correct rate, without the need for detailed association to the individual project task.

If a fixed hourly rate is selected at the project level, the staffing process only consists of adding the relevant employees to the resource group.





2.2 Streamlining allocation of individual tasks

When you need to allocate employees explicitly to individual tasks, it can be an advantage to connect a resource group first - even if the project is already set up so that time registration for each task is only allowed for the employees that are directly allocated to the task. When you search for an employee to be allocated to a task, TimeLog will suggest as a starting point that you search among the resource group's members (which, however, can be changed to search for all employees). This makes the employee search easier and simpler.

At the same time, rate setting for allocations has become easier, as TimeLog Project suggests allocations at the hourly rate that are stated for the individual resource group member, unless something else is stated for the specific task.

3 Employee Allocation

3.1 What is employee allocation?

In TimeLog Project, the project manager can add employees to the project and the individual phases.

Association of employees has the following purpose:

- To control who can register time
- To determine the rate for the individual employee's time
- To create a foundation for effective resource planning

The association can occur in multiple ways and in more or less detail, depending on how much detail is needed, which tasks are relevant for the individual employee, how differentiated the rate setting is needed, and how widely resource planning is used.

Overall, there are two approaches to employee association:

- Indirect allocation
- Direct allocation





“The most detailed method for attaching employees to a project is by directly allocating the individual employee to the individual task”

3.1.1 Indirect allocation

The quickest and most general method for linking employees to a project is by indirect allocation. Here, you give a group of employees access to register time for each of the project's tasks. The project manager does not need to decide who needs to register time for the individual tasks. The group can either be all employees, employees in a chosen department (if you have the [TimeLog Departments](#) extension) or a more closely defined group of employees that are gathered as a project group under the **Resource group** tab.

Since in this way, access is given to time tracking for all the project's tasks, the hourly rate is determined for all tasks that are settled by time spent, also on a general level. This is done on the project's main information by either choosing a shared hourly rate for all, creating a resource group with specific rates for each member, or by letting the rate depend on the individual member's standard rate according to the employee's standard information.

3.1.2 Direct allocation

The most detailed method for attaching employees to a project is by directly allocating the individual employee to the individual task. Using this method, you choose which employee should register time for each task, and you have the option to add how many hours the employee is expected to use on the task's completion. In this way, the individual employee's weekly timesheet will be limited to exactly those phases that are relevant for the person, and not necessarily for every phase on the project.

By directly allocating to phases that are settled by time spent, it is also possible to make the rate setting more detailed and nuanced. For each employee that is allocated to a given task, you state the hourly rate that should be invoiced for the relevant employee's work. In this way, the same employee can have different hourly rates, depending on the task, just as two employees working on the same task can have different hourly rates.

3.1.3 Combining indirect and direct allocation

It is possible to combine direct and indirect allocation, by which the hourly rates for direct allocations has a higher priority than the general hourly rate. This can be useful if you wish an easy attachment of employees to a project, but there are exceptions to the project's general rate settings.





The combination is done by selecting the general hourly rate, setting up the resource group – which then has access to register time for every phase on the project - and then allocating employees directly to the task, where a different rate is used than the general rate.

By assembling a resource group first, you make it easier to search among the group's members, which makes it easier to locate the right person.

PLEASE NOTE! If a resource group member is allocated to a task with a specified hourly rate, then the task's hourly rate has priority in comparison to the hourly rate selected for the resource group member.

3.1.4 Automatic direct allocation

If an employee is not directly allocated to a given task, the employee will automatically be allocated directly to the task, the first time he or she registers time there. This happens, regardless if the employee, who is indirectly allocated, creates their first time registration for the task, or if the employee allocates themselves to the phase from one of TimeLog Project's time registration tools. By this automatic allocation, the employee is allocated with zero hours to the task. The hourly rate for the employee on the relevant task is determined by the method that is described in [3.2 Rate hierarchy](#) below.

3.1.5 Task-specific rates

For each task, an hourly rate can be chosen. If an hourly rate is chosen, that rate will have a higher priority than any general hourly rate for the project and hourly rate for the individual member of the resource group. This means that when you want to allocate an employee directly to a task where an hourly rate is stated, TimeLog Project will suggest that the employee is allocated at the task's rate. This happens regardless of the employee is automatically allocated directly to the task as described as in [3.1.4 Automatic direct allocation](#) above.

3.2 Rate hierarchy

3.2.1 Rates for resource group members

When a new employee is added to a resource group, TimeLog Project uses the following method to determine which hourly rate should be suggested as the resource group members' hourly rate.



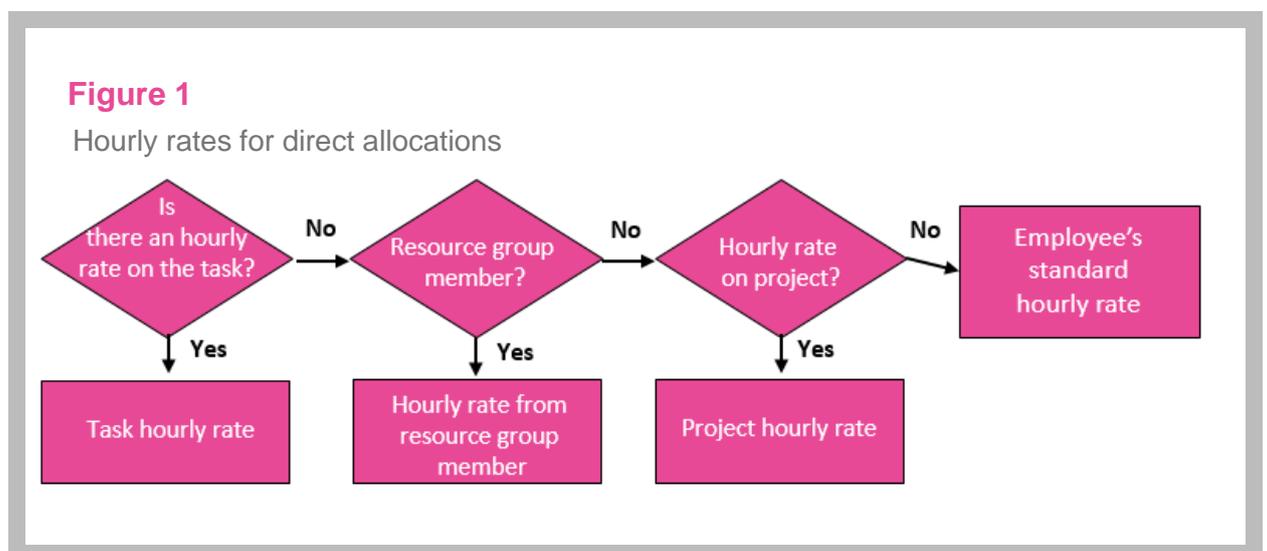


1. If an hourly rate given in the Hourly Rate field for the project (under the Properties group), this rate is suggested
2. If an hourly rate is not given for the project, the standard hourly rate from the employee's information.

3.2.2 Hourly rates for direct allocations

The following describes which hourly rate is suggested when a given employee allocates directly to a given task. The first time an employee registers time to a task that they are already allocated to, either as a resource group member registering time themselves for the first time to the task, or by the employee registering themselves to the task via the detailed timesheet or weekly timesheet, they are allocated directly to the task. With the creation of this direct allocation, the same method is used to determine which hourly rate should be used. The hourly rate is chosen based on the below principles:

1. The hourly rate in the **Hourly rate** field on the task will be used
2. If there is no hourly rate on the task, and the employee is member of the resource group, then the hourly rate specified for the employee in the resource group setup will be used
3. If the employee is not member of the re-source group, then the hourly rate specified for the project will be used
4. If the employee is not member of the re-source group, and there has not been specified an hourly rate for the project, then the default hourly rate for the employee will be used.





3.3 Employee association and practical rate setting

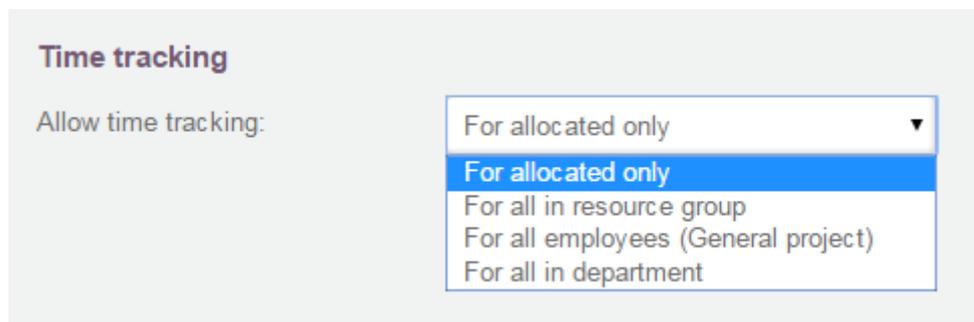
This section describes how to set up projects, resource group members and task-specific rates, as well as how to associate an employee with a project, both by indirect allocation and direct allocation.

3.3.1 Indirect allocation: Choose the level of detail

On the project's **Settings** tab in the **Permit time registration** field where time registration needs to be permitted for all allocated employees, for members of the resource group, for all employees (General project) and for the department's employees (with the [TimeLog Departments](#) extension).

Figure 2

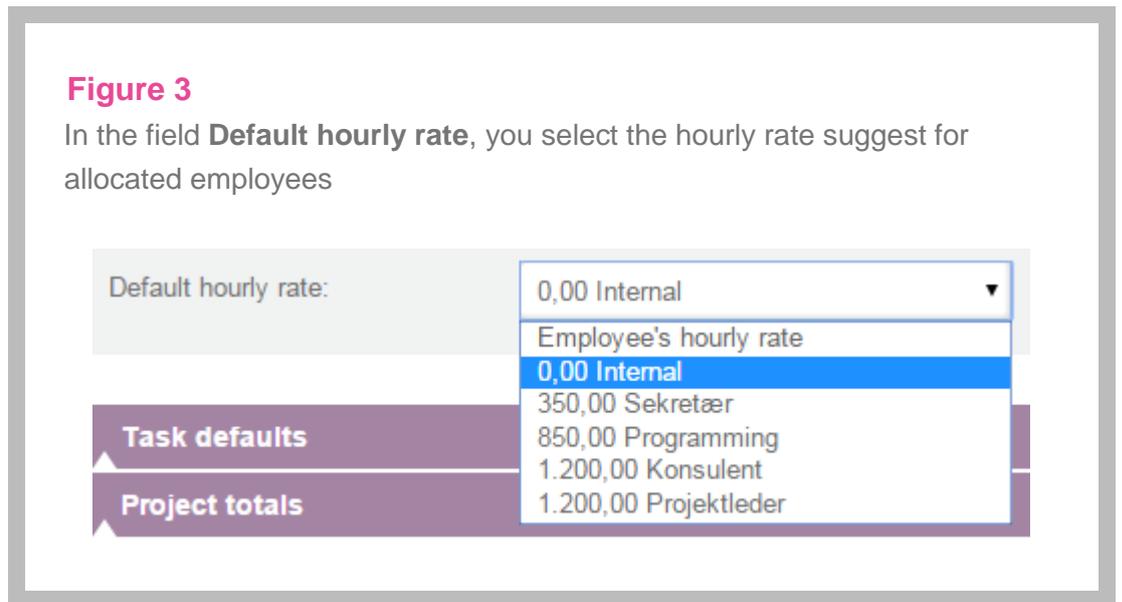
In the field **Permit time registration**, you select who should initially be able to track time on the project



3.3.2 Choose hourly rate

In the **Standard hourly rate** field, a specific hourly rate is chosen if all tasks that are settled by time spent should have a determined hourly rate as a starting point, or an **Employee standard rate**, if the hourly rate for each employee's work as a starting point should be completed by the individual's standard hourly rate applicable to the employee on the relevant project. The employee's standard hourly rate is determined as described in [3.2 Rate hierarchy](#).





3.3.3 Assemble the resource group

This step is not necessary if you have chosen on the project's **Settings** tab that time registration is permitted for all employees (General project), or for a department's employees (if you use the [TimeLog Departments](#) extension). If on the project's **Settings** tab you have chosen that time registration is only permitted for allocated employees, this step is not necessary either, but can be done to make the direct allocation of employees easier and quicker, since by using direct allocation, you are searching among the resource group's members.

On the **Resource group** tab, the employees are chosen that will be in the resource group. First, click **Add resources**. Then employees can be searched for using lists and free text search.

Employees in the employee list that match the search terms are suggested, along with an hourly rate dependent on the project's hourly rate settings (see [3.2 Rate hierarchy](#)).

If you want the resources' hourly rate to be different from what was suggested, it can be changed for the employee before you click **Add**. If there is only one employee that matches the search criteria, the employee can be added to the resource group by clicking **Enter** when in the free text search field.

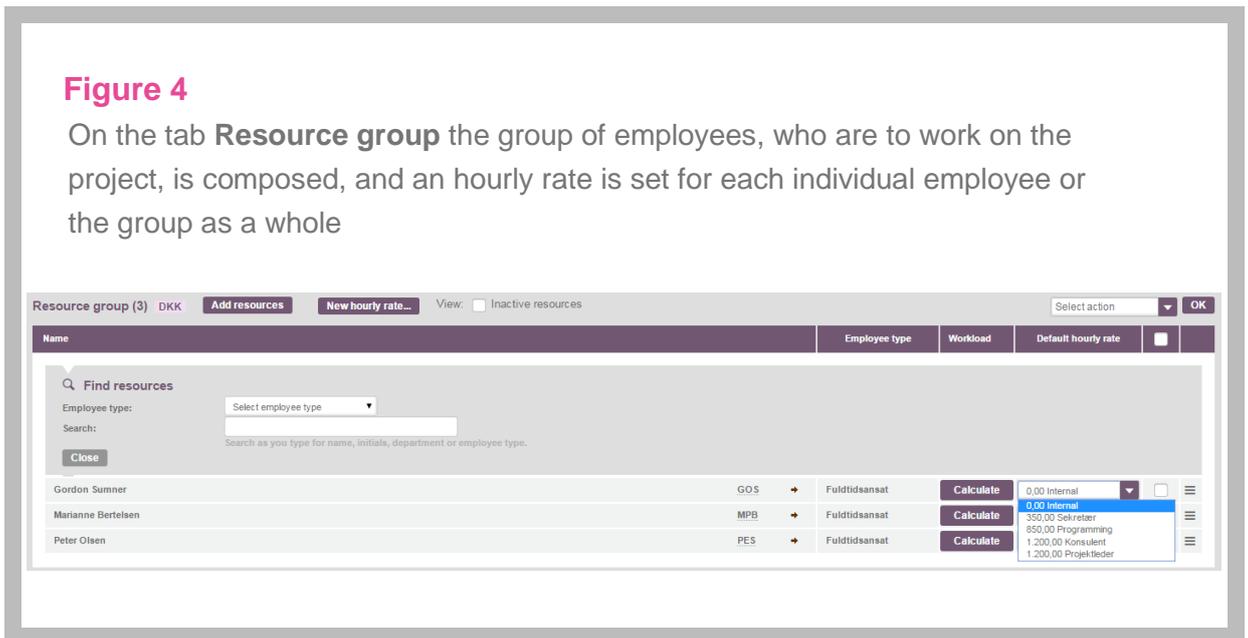
When all the necessary resources are added, click **Cancel** to go back to the list of resource group members.





Figure 4

On the tab **Resource group** the group of employees, who are to work on the project, is composed, and an hourly rate is set for each individual employee or the group as a whole



3.3.4 Adjust resource rates

When the resource group is assembled, the hourly rate for the individual resource group member is easily adjusted in the **Resource group** tab by clicking the desired price and clicking **Save**.

3.3.5 Indicate task-specific rates

If there are tasks where the hourly rate should be different than the standard rate for the resource group's members and overall allocated employee's, the individual task's hourly rate can be given after the task is set up. This is done by choosing the desired hourly rate in the **Hourly rate** field. See **Figure 5** on the next page.

3.3.6 Direct allocation

If the project is set up to only register time for allocated employees, the employees should be allocated directly to the tasks where time should be registered – also even if a resource group has been set up. If a resource group is set up, the direct allocation will be easier and faster, as you can only choose to search the resource group's members instead of all employees – and hourly rates are suggested based on the resource group's setup.

In the **Project plan** or the **Project plan (h.)** tab, the menu opens for the task that employees should be allocated to, and **Add resources** is selected.





Figure 5

When creating or editing a task you can specify an hourly rate in the field **Hourly rate (EUR)**, if the employees should be allocated to an hourly rate different from their default, when they are allocated directly to the task.

WBS	Name	Start date	End date	Budget (h.)	Hourly rate (DKK)	Budget (DKK)	Description	Link
2		30-06-2015	30-06-2015	0,00	Employee's default hourly rate			
Save Cancel								
+	2	▲ Afholdelse						
		↳ GOS (Gordon Sumner)						
		↳ PES (Peter Olsen)						
+	3	▶ Evaluering						
Total								

Then, search for the employees that should be linked to the task. The search is limited to searching within the resource group's members, but it is possible to search among all employees, or employees in a specific department (with the [TimeLog Departments](#) extension) by changing the setting in the **From** field.

For each employee to be allocated, indicated the number of hours the employee should allocate to the task, as well as the relevant hourly price.

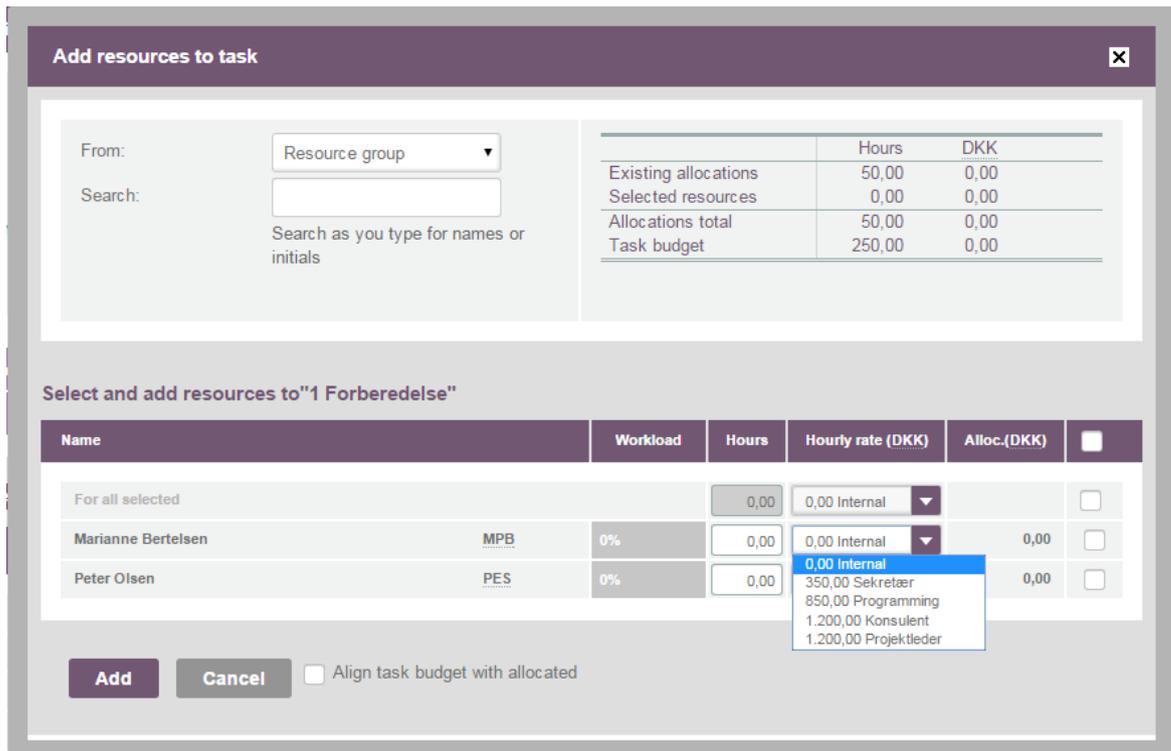
It will be suggested to link the employee with an hourly rate using the rate derivation method described in [3.2 Rate hierarchy](#).





Figure 6

Click on **Add resources** in a task's context menu to open a window, where you can allocate employees directly to the task. By default you can search through the members of the resource group. TimeLog Project suggests an hourly rate from the project's settings and the resource group, and you can select another hourly rate for each individual allocation.



3.4 Additional allocation functions

3.4.1 View the directly allocated for a given task

In the **Project plan** or the **Project plan (h.)** tab, a green hour is shown for each task where employees are directly allocated. By clicking this arrow, a list of employees who are directly allocated to the task is shown, and the number of allocated hours and the hourly rate can be edited.

See **Figure 7** on the next page.





Figure 7

Direct allocation

WBS	Name
+	1 Forberedelse
	👤 GOS (Gordon Sumner)
+	2 Afholdelse
	👤 GOS (Gordon Sumner)
	👤 PES (Peter Olsen)
+	3 Evaluering
	👤 GOS (Gordon Sumner)
Total	

3.4.2 Deactivate a resource group member

On the **Resource group** tab, an individual resource group member can be deactivated. It can be relevant to deactivate a member when the individual is no longer associated with the project.

When a resource group member is deactivated, they can no longer register time to the project.

A resource group member is deactivated from the **Resource group** tab by unchecking the box to the right of the resource group member and choosing the **Deactivate** option.

Figure 8

Deactivation of a resource group member

Resource group (3) DKK Add resources New hourly rate... View: Inactive resources

Name	Employee type	Workload	Det	Select action
Gordon Sumner	GOS	Fuldtidsansat	Calculate	0,00 Internal
Marianne Bertelsen	MPB	Fuldtidsansat	Calculate	0,00 Internal
Peter Olsen	PES	Fuldtidsansat	Calculate	0,00 Internal

Select action menu: Select action, Remove, Reactivate, Deactivate

