



Assign Resources to BTE Projects

	Assigning resources to BTE projects enable users to manage the allocation of resources to existing projects and/or tasks.
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Please note that depending on your Beeline Platform settings, this feature may, or may not, be turned on. Reach out to your Beeline Representative to adjust settings.

How to Navigate to Assign Resources to BTE Projects via Self-Service:

1. Log in to the Beeline Platform using your *username* and *password*. Your Home page appears.
2. Click the **My Preferences** icon  at the top right of your page in the Header Menu.
3. Hover over the **VMS Settings** menu item and click **Time & Expense**.
4. Click **Assign Resources to BTE Projects** from the list of available Time & Expense Self-Service features.
5. The **Assign Resource List Screen** opens where you can add, update or change BTE project resource assignments. Users can elect to create new association's either **Resource to Project** or **Project to Resource**.

How to Assign a BTE Project to a Resource:

Complete steps 1-4 above.

5. Click the **Create New Association (Project to Resource)** link displayed above the search criteria fields.
6. Click the **Search** icon next to the Resource field to open the Resource Select window. Use the Search link to locate the resource to be associated to the project.
7. Click **OK** to complete your selection and return to the **Assign Project to Resource** screen. (Note: only a single resource may be selected)
8. Click the **Add Item** link in the Assign Project section and fill in the search criteria fields. Your search results will display at the bottom of the screen.
9. Click the checkbox next to the Project column to indicate which project(s) to assign to the resource. (Note: more than one project may be selected.)
10. Click **OK** to save your selection(s) and return to the Assign Project to Resource Screen.
11. Click **OK** to save your changes and exit. Click Save and Add New to continue assigning resources to projects; then click OK to save and exit back to Assign Resource List Screen.

How to Assign a Resource to a BTE Project:

Complete steps 1-4 from the “Navigating to Assign Resources to BTE Projects” section above.

5. Click the **Create New Association (Resource to Project)** link displayed above the search criteria fields.
6. Enter the requested information on the **Assign Resource Screen** to identify the project. The asterisk (*) indicates required fields. **Note:** the required **Task** field is only activated when the **Assign to Task** checkbox is selected.
7. Click the **Select** option next to the **Resources** field to open the Resource Select window. Use the Search link to locate the resource (or multiple resources) to be associated to this project. Click OK when your list is complete to save your selections and return to Assign Resource Screen.
8. Click **OK** to save your changes and exit. Click **Save and Add New** to associate resources to a DIFFERENT project; then click **OK** to save and exit.

How to Remove a Resource from a BTE Project:

Complete steps 1-4 from the “Navigating to Assign Resources to BTE Projects” section above.

5. Enter search criteria on the **Assign Resource List Screen** to locate either the project or the resource; then click **Search**. Your results will display at the bottom of the screen.
6. Click each checkbox next to the Project column in the displayed results to indicate which Resource to project or Project to Resource records are to be deleted. (Note: this will NOT delete either the BTE project or the Resource record; it will only remove the association between these two records. If a checkbox is grayed out, it indicates there is an open activity on the resource record that must be completed before a **delete** can be processed.
7. Click the **Delete Selected** link above the search criteria fields when you have finished making your selections. An alert box will display asking if you are sure you want to delete the selected item(s).
8. Click **OK** to authorize the deletions. The number of deleted records will display on the Assign Resource List Screen.