

Assigning:

Assign people to Projects and Tasks

Purpose: Assign people to projects or tasks.

Perspective: "People Assignment"

In this tutorial:

1.1 Assigning a person to a project or task

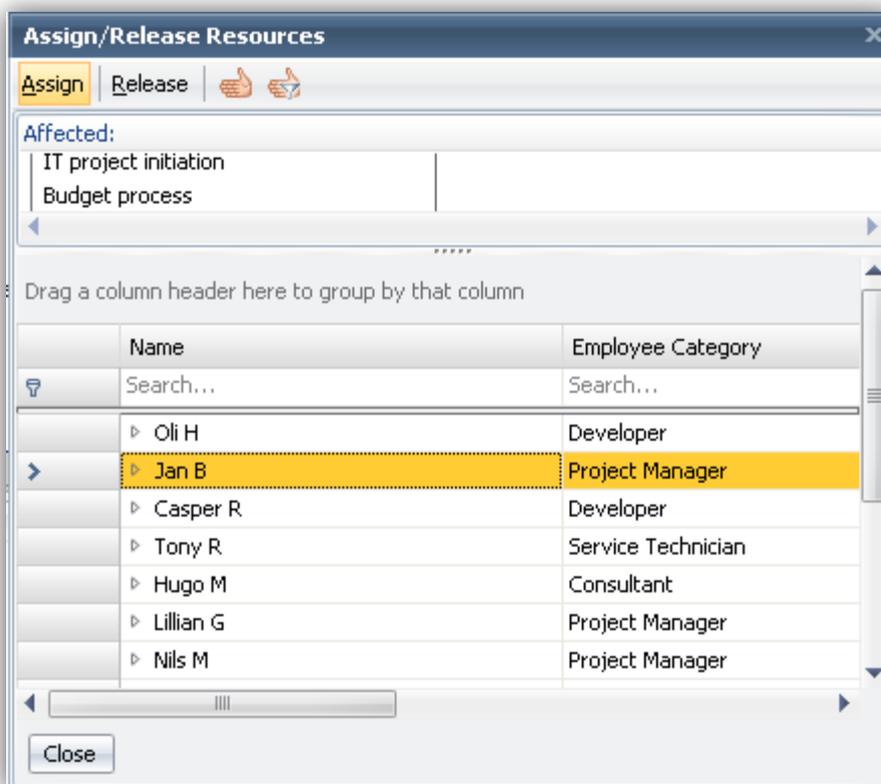
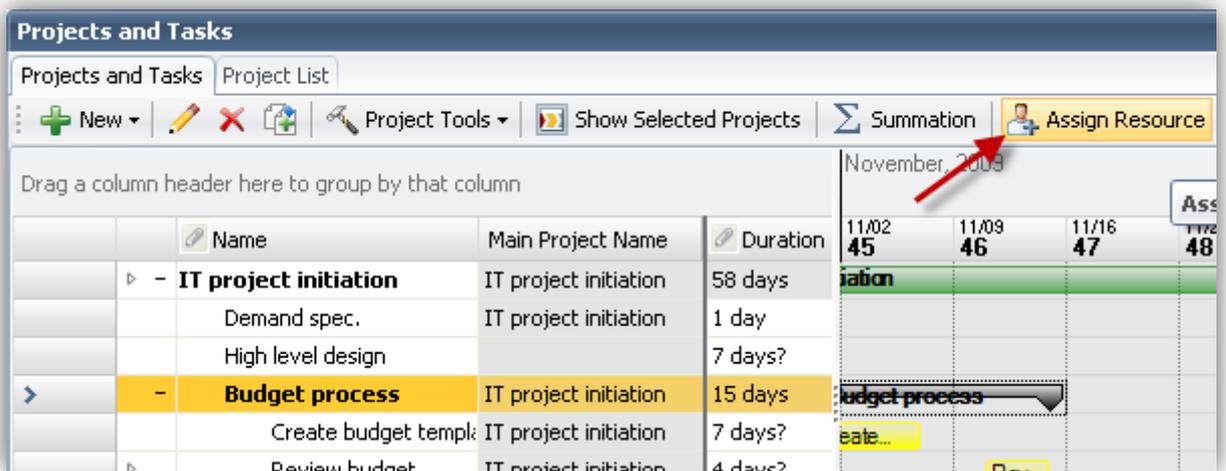
1.2 Assigning based on capacity

On the Projects and Tasks tab, select a project by clicking on its row. (Budget Process is selected in the below example).

The screenshot shows the 'Projects & Tasks' interface. The main table lists tasks with columns for Name, Quick Assign, and Duration. The 'Budget process' task is highlighted in yellow. To the right, a Gantt chart for November 2009 shows the task's duration from 10/26 to 11/09. The Gantt chart includes a 'Budget process' bar and several sub-tasks with buttons like 'Create...', 'Rev...', 'Develop...', 'Assign...', 'Devel...', and 'Meet...'.

Name	Quick Assign	Duration
- IT project initiation		58 days
Demand spec.		1 day
High level design		7 days?
> - Budget process		15 days
Create budget template		7 days?
Review budget		4 days?
- Development plan		7 days
Assign needed people		7 days?
- Development phase 1		7 days?
Meet with stakeholders		7 days?
- Development phase 2		1 day?

If you already know who you want to assign, select Assign Resource in the toolbar.

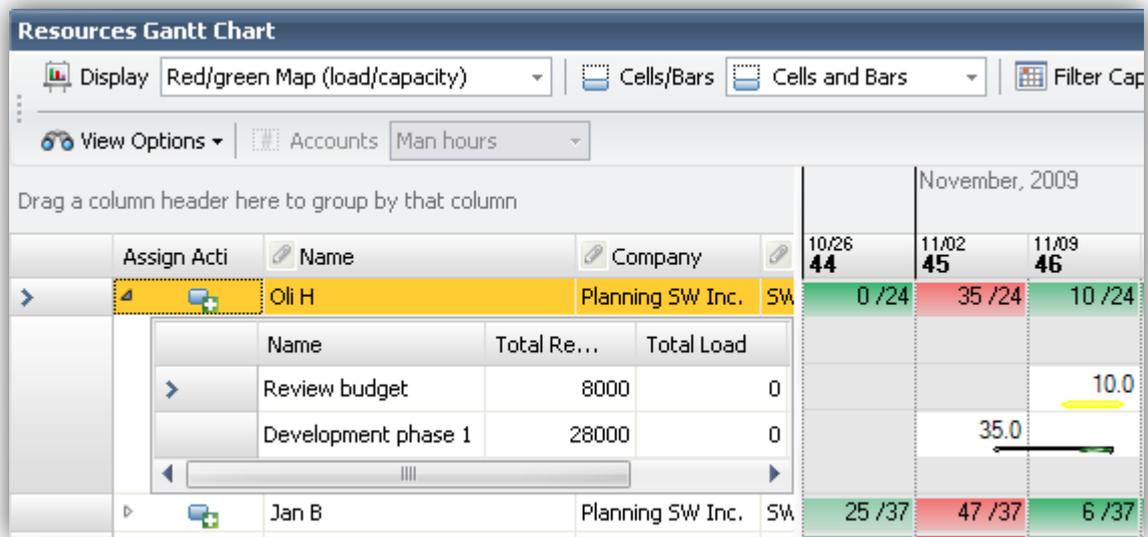


An Assign Resource window will pop up:

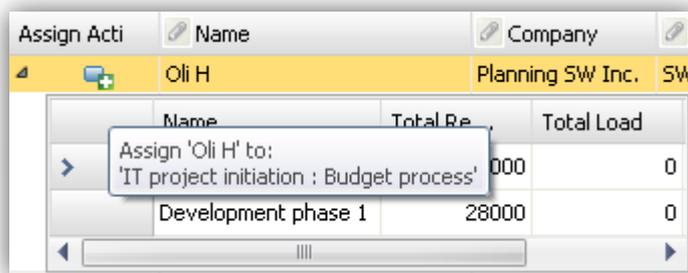
Here you can select one or more people (using the ctrl key to select multiple people) and select Assign. They will then be assigned to the project or task you had selected in the Projects and Tasks chart.

1.2 Assigning based on capacity

Instead, if you are planning based on available capacity, meaning which one of your employees has the right skills and hours for the assignment, you can look below, at the People Gantt, and choose which person you would like to assign. Notice their red / green balance, indicated overbooking (red) and available capacity (green). Click on the small triangle to the left of the person's name to see what assignments and hours they have.

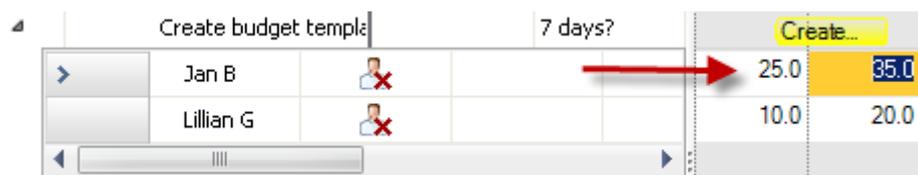


In the People Gantt, you can adjust hours and balance capacity. Observe if the person you want to book for your project or task is overbooked in that week, if so, either choose another person or reschedule some of their existing hours. You can expand the duration or move the project or task in time by selecting the “Show Activities” button and then drag and drop items in the Gantt chart.



Beside the person’s name you can click on the small blue “Assign” button to assign the person to the selected task.

Once you assign someone, white cells appear in the Gantt chart and you can add hours for the selected person in the cells.



You can also extend the duration of the project or task, and drag and drop the task or project Gantt bar to move it in time to accommodate the person’s other obligations. Ideally, their red/green chart should be balanced, with as little red, or overbooked hours, as possible.

You can repeat these steps, assigning people to different projects and tasks or assigning more people to the project or task you’ve selected.

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