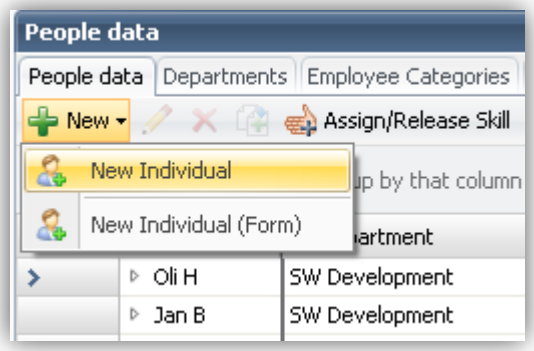
People:

1. Creating new person or customer profile:

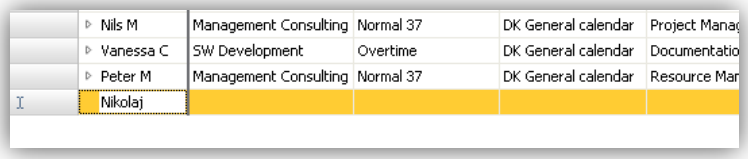
Purpose: Use drop down menus and fill in data to create new profiles.

Perspective: “People Data”

In this tutorial, we will use the People Data perspective and go through the steps in this. However, the process is the same for adding a new customer using the Customers perspectives.

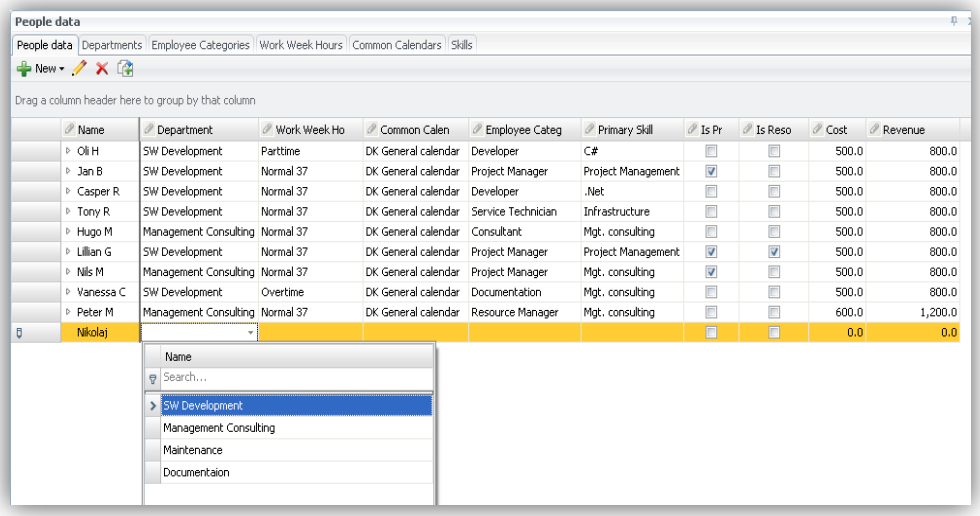


Click “New” and choose “Individual”

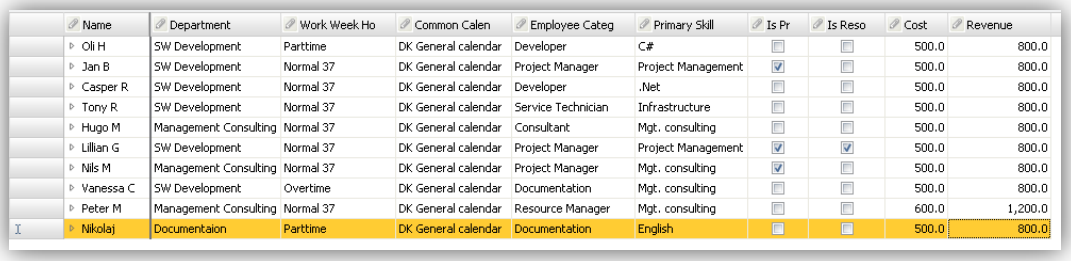


A new line will appear below the last entry. Give it a name.

In the next columns, choose the appropriate category for each column.



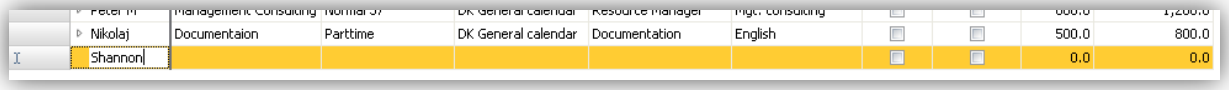
For this example, we will set Nikolaj to “Documentation ” and fill in the rest accordingly.



	Name	Department	Work Week Ho	Common Calen	Employee Categ	Primary Skill	Is Pr	Is Reso	Cost	Revenue
	Oli H	SW Development	Parttime	DK General calendar	Developer	C#	☐	☐	500.0	800.0
	Jan B	SW Development	Normal 37	DK General calendar	Project Manager	Project Management	☑	☐	500.0	800.0
	Casper R	SW Development	Normal 37	DK General calendar	Developer	.Net	☐	☐	500.0	800.0
	Tony R	SW Development	Normal 37	DK General calendar	Service Technician	Infrastructure	☐	☐	500.0	800.0
	Hugo M	Management Consulting	Normal 37	DK General calendar	Consultant	Mgt. consulting	☐	☐	500.0	800.0
	Lillian G	SW Development	Normal 37	DK General calendar	Project Manager	Project Management	☑	☑	500.0	800.0
	Nils M	Management Consulting	Normal 37	DK General calendar	Project Manager	Mgt. consulting	☑	☐	500.0	800.0
	Vanessa C	SW Development	Overtime	DK General calendar	Documentation	Mgt. consulting	☐	☐	500.0	800.0
	Peter M	Management Consulting	Normal 37	DK General calendar	Resource Manager	Mgt. consulting	☐	☐	600.0	1,200.0
I	Nikolaj	Documentaion	Parttime	DK General calendar	Documentation	English	☐	☐	500.0	800.0

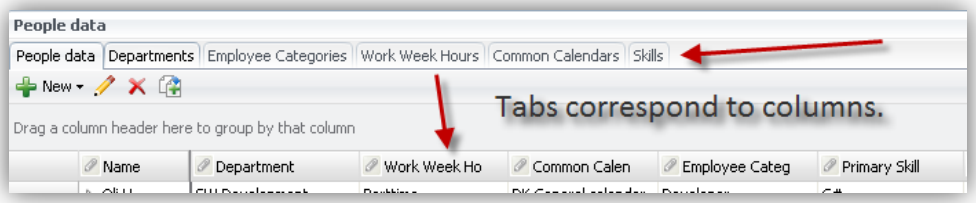
In case the needed category was not available, we can create it using the tabs at the top of the view. In the next steps, we will create a new person. None of the categories are available for her so we'll create them.

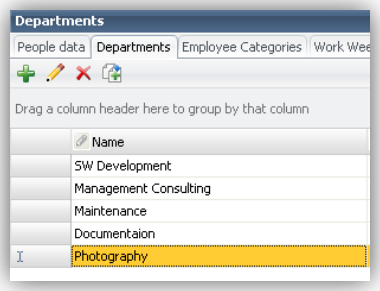
Again, follow steps 1 & 2. Click "New" and choose the first instance of "Individual" and give it a name.



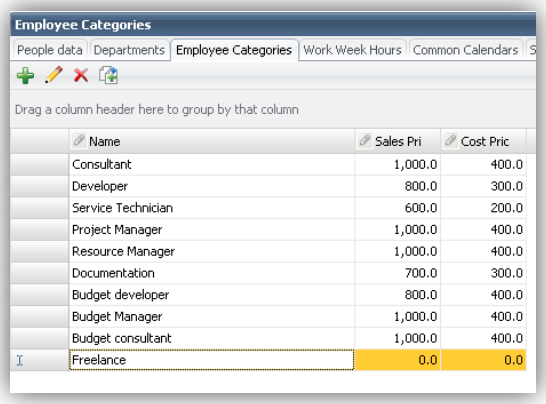
	Nikolaj	Documentaion	Parttime	DK General calendar	Documentation	English	☐	☐	500.0	800.0
I	Shannon						☐	☐	0.0	0.0

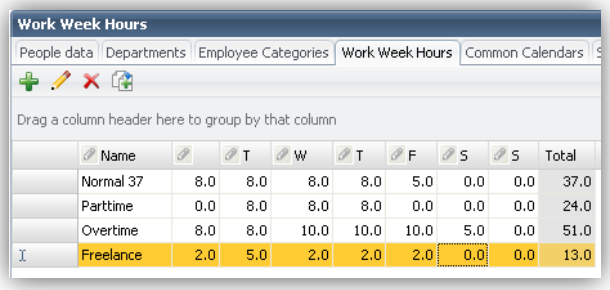
Now we will go to each tab and enter a new category for each section.



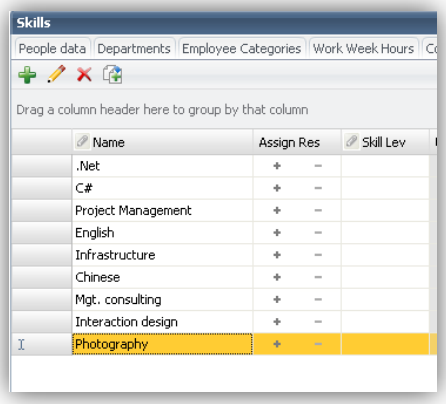


For Departments, we add "Photography"
For Employee Category we add "Freelance"
For Work Week Hours, we add a "Freelance" schedule to define capacity.

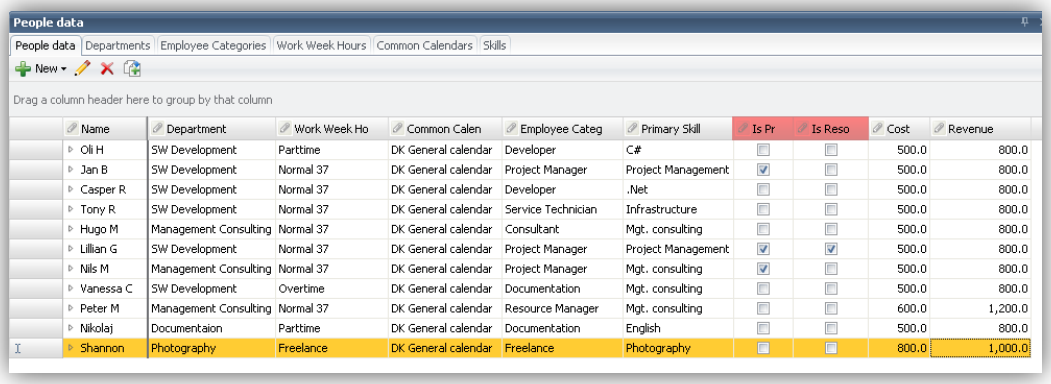




We leave “Common Calendar” because the new person will be working on a standard Danish (DK) calendar. For Skills, we add photography.

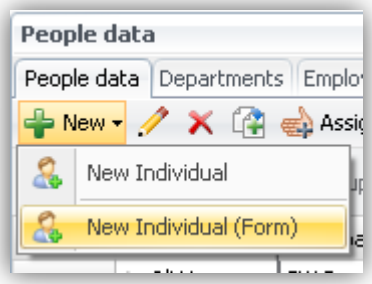


Returning to the People Data tab, we can now add all the attributes to our new person profile using the drop down menus. We can also check if our new person is a “Project Manager” or a “Resource Manager” as highlighted in pink. This information is useful later when assigning project or resource managers to projects. We can also set cost and revenue for every new person profile using the last two columns.



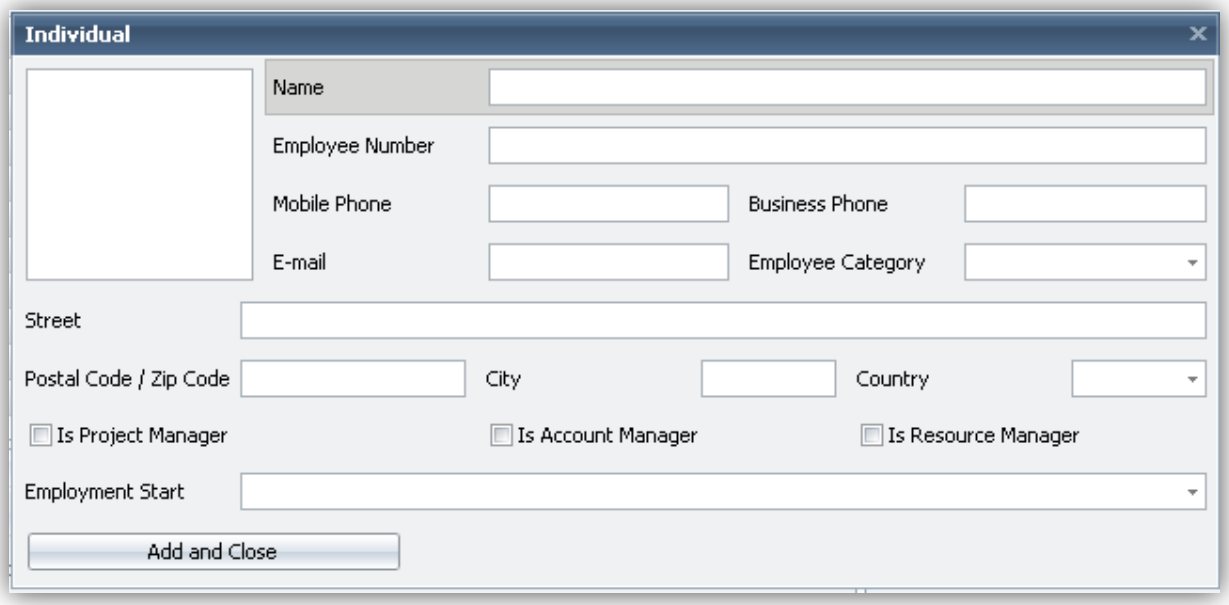
The new person profile is complete. The same steps apply for adding a customer.
Note: Skills and Skill level lists are also part of People Data however that is covered in the Skills tutorial.

Adding New Person Profile from Form:

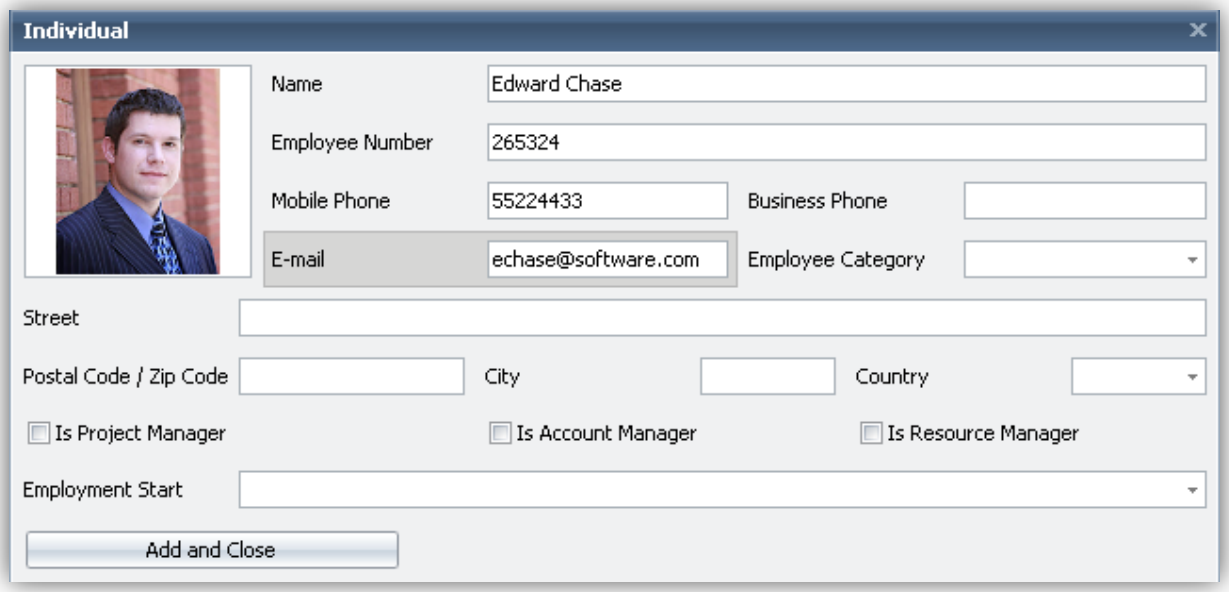


Click “New” and choose “Individual (Form)”

A form will pop up.



Right click in the blank area on the left to insert a photo, and choose “Load”. Locate the folder on your hard drive and select it.



You can add all the relevant details here and if needed, continue to edit his information further using the previous steps.