

Quick Booking

Quick booking people to tasks and projects

Purpose: Without requiring an assignment to exist, assign people to ad-hoc projects or tasks.

Example Perspective: "People Gantt Chart"

In this tutorial:

1.1 Quick booking a new task

1.2 Booking on New Project

1.3 Booking on an Existing Task

You can quickly add give someone a new task or project by using Quick Booking. You can also add them to an existing task. We'll do this in three parts: New Task, New Project and Existing Task.

1.1 Quick Booking a New Task:

Right click in the green/red Gantt area and select "Make booking on new task..."

The screenshot shows the 'People Gantt' application window. The main area is a table with columns for 'Assign Acti', 'Name', 'Company', and 'Department'. The table lists several people, with 'Lillian G' highlighted in yellow. To the right of the table is a Gantt chart area with a context menu open. The menu options include 'Day', 'Week', 'Month', 'Create new project...', 'Make booking on new task...' (highlighted), 'Make booking on existing task...', 'Show allocations', 'Start date' (set to 12/07/2010), 'Go to earliest date', and 'Go to today'.

Assign Acti	Name	Company	Department
▶	Oli H	Planning SW Inc.	SW Development
▶	Jan B	Planning SW Inc.	SW Development
▶	Casper R	Planning SW Inc.	SW Development
▶	Tony R	Maintenance Inc.	SW Development
▶	Hugo M	Consulting Inc.	Management Consulting
> ▶	Lillian G	Consulting Inc.	SW Development
▶	Nils M	Consulting Inc.	Management Consulting
▶	Vanessa C	Consulting Inc.	SW Development
▶	Peter M	Planning SW Inc.	Management Consulting
▶	Employee	Planning SW Inc.	SW Development
▶	Middle manager	Planning SW Inc.	SW Development
▶	Top manager	Planning SW Inc.	Management Consulting
▶	Programmers	Planning SW Inc.	SW Development
▶	Project managers	Planning SW Inc.	SW Development

Enter hours for that task and press ENTER. (It's important to remember to press enter; this sets the value so you can begin to detail your new task).

Lillian G		Consulting Inc.		SW Development		12 / 37		5	
	Name	Total Re...	Total Load	Release ..					
>		8	0		0.0				
	Budget process	0	0			2			
	2. Analysis phase	0.8	0						
	Full analytical revie...	7.2	0				1		
	Analysis of Phase 1	7.2	0				9		

Once you have entered hours, press enter and a dialog will pop up, allowing you to give your new task a name, duration and to select a **Parent** for it. The parent is important since it associates the task to an existing project.

New Booking Task x

Name

Description

Start Finish

Parent

Assign to Resources

Assigned	Name	Company	Departmen
<input type="checkbox"/>	Oli H	Planning SW Ir	SW Developme
<input type="checkbox"/>	Jan B	Planning SW Ir	SW Developme
<input type="checkbox"/>	Casper R	Planning SW Ir	SW Developme
<input type="checkbox"/>	Tony R	Maintenance I	SW Developme
<input type="checkbox"/>	Hugo M	Consulting Inc	Management C
<input checked="" type="checkbox"/>	Lillian G	Consulting Inc	SW Developme
<input type="checkbox"/>	Nils M	Consulting Inc	Management C
<input type="checkbox"/>	Vanessa C	Consulting Inc	SW Developme
<input type="checkbox"/>	Peter M	Planning SW Ir	Management C
<input type="checkbox"/>	Employee	Planning SW Ir	SW Developme

You can then choose to only have your one person assigned or select more and assign them to the task also. Save and Close. (For now, we only assign Lillian).

Lillian G		Consulting Inc.	SW Development	27 / 37	5 / 37
Name	Total Re...	Total Load	Release ..		
Budget process	8	0		2	5
2. Analysis phase	0	0			
Full analytical revie...	0.8	0		1	
Analysis of Phase 1	7.2	0		9	
Review web content	12	0		15	

1.2 Booking on New Project:

You can follow the same steps, (right click in green/red area) and select "Create new project".

Lillian G		Consulting Inc.	SW Development	27 / 37	5 / 37	3 / 37	0 / 37	0 / 37
Nils M	Consulting Inc.	Management Consulting	6 /	1	Day			
Vanessa C	Consulting Inc.	SW Development	5 /	7	Week			
Peter M	Planning SW Inc.	Management Consulting	9 /	31	Month			
Employee	Planning SW Inc.	SW Development	0 /		Create new project...			
Middle manager	Planning SW Inc.	SW Development	0 /		Make booking on new task...			
Top manager	Planning SW Inc.	Management Consulting	0 /		Make booking on existing task...			
Programmers	Planning SW Inc.	SW Development	300 / 1,6		Show allocations			
Project managers	Planning SW Inc.	SW Development	20 / 2		Start date 12/07/2010			
Progress	Planning SW Inc.		0 /		Go to earliest date			
Team A					Go to today			

This time, the dialog pops up right away:

New Project x

Name

Description

Start Finish

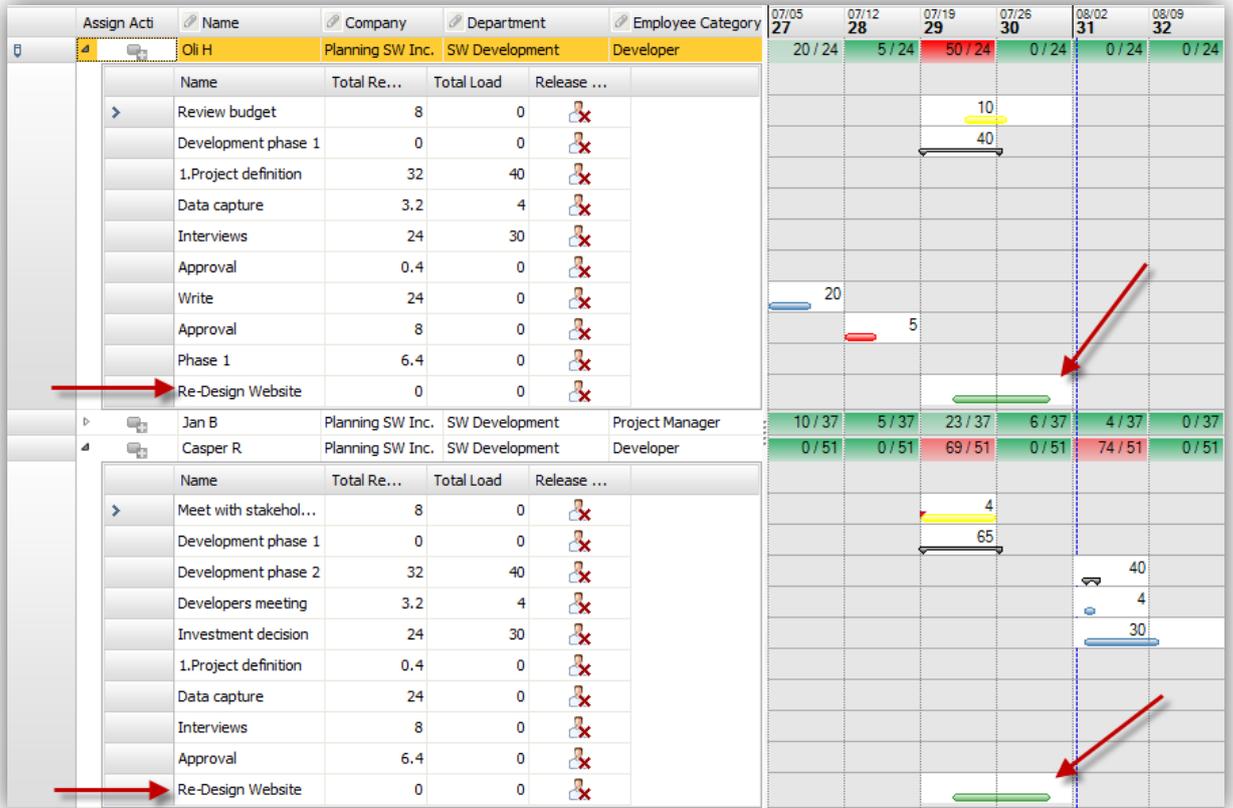
Parent

Assign to Resources

Assigned	Name	Company	Department
<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>
<input checked="" type="checkbox"/>	Oli H	Planning SW Ir	SW Developme
<input type="checkbox"/>	Jan B	Planning SW Ir	SW Developme
<input checked="" type="checkbox"/>	Casper R	Planning SW Ir	SW Developme
<input type="checkbox"/>	Tony R	Maintenance Ir	SW Developme
<input type="checkbox"/>	Hugo M	Consulting Inc	Management C
<input checked="" type="checkbox"/>	Lillian G	Consulting Inc	SW Developme
<input type="checkbox"/>	Nils M	Consulting Inc	Management C
<input type="checkbox"/>	Vanessa C	Consulting Inc	SW Developme
<input type="checkbox"/>	Peter M	Planning SW Ir	Management C
<input type="checkbox"/>	Employee	Planning SW Ir	SW Developme

You can give the new project a name, a duration, and select more than one person to work on it, if you need to.

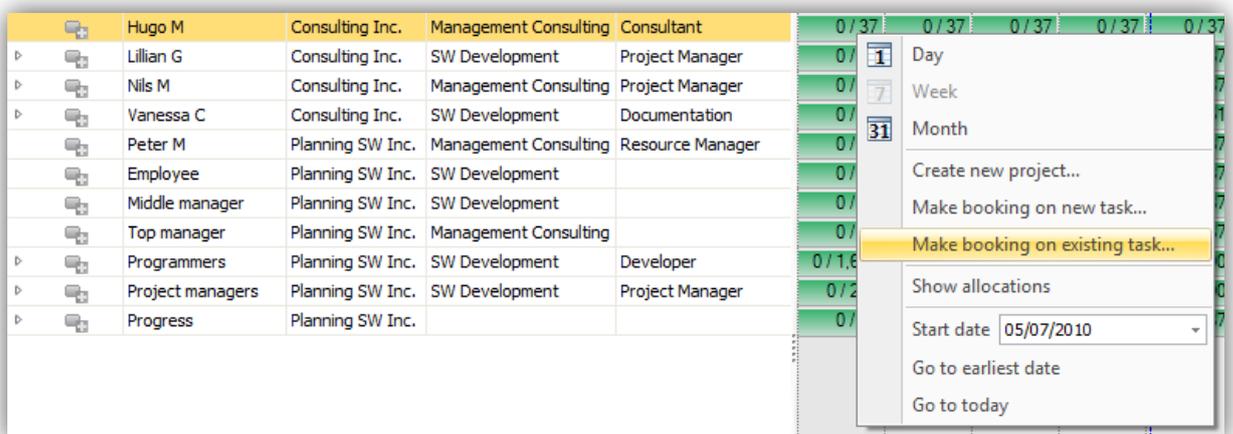
You can see the new project in each assigned person's assignments list:



Now you can enter hours for the project in each white cell.

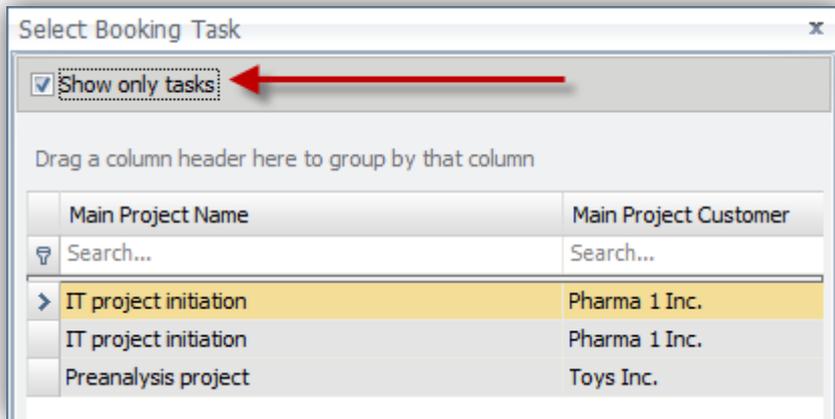
1.3 Booking on an Existing Task

To make a booking on an existing task, select the person's row, and right click in the Gantt chart, select "Make booking on existing task". Where you right click is important, because that will determine which projects it will consider for the existing tasks.



You can also choose to make a booking on an existing project. To do this, unselect "Show only tasks"

in the dialog that comes up.



Once you select a task (or project) the new booking will show up on the first row of the assignments list:

Hugo M	Consulting Inc.	Management Consulting	Consultant	65 / 37
Name	Total Re...	Total Load	Release ...	
Demand spec.	9.6	0		
High level design	8	0		10
Task 1	44	0		55

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