

Skills:

Creating, managing and using skills.

Purpose: Define skills and skill levels, assign skills to resources (e.g. persons) and use skill selector for finding people with desired skills.

Perspectives: "People Data" and "People Assignment".

In this tutorial:

1.1 Define skill level lists

1.2 Define a skill

1.3 Define people's skills and levels

1.4 Skill Selector

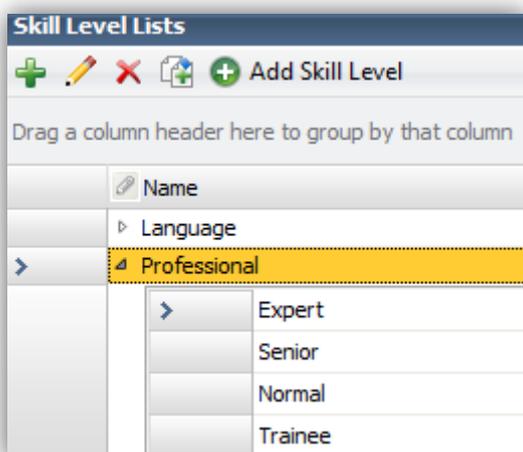
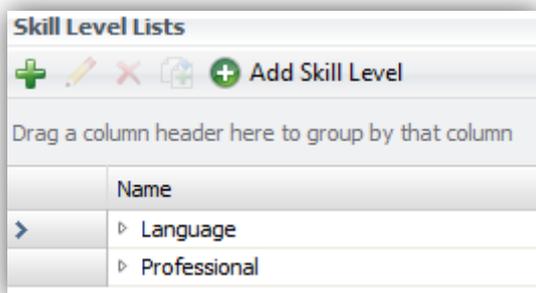
1.5 Using Skills to Assign a Resource

1.6 Assign

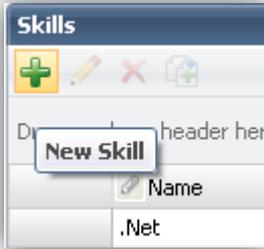
1.1 Define skill level lists:

Perspective: "People Data".

In the lower right corner, select the view "Skill level list" and define a new list using the  symbol. Name the list "Professional" and create four levels using the "Add skill level" button: 1) expert, 2) senior, 3) normal and 4) trainee.



1.2 Define a Skill



Perspective: "People Data".

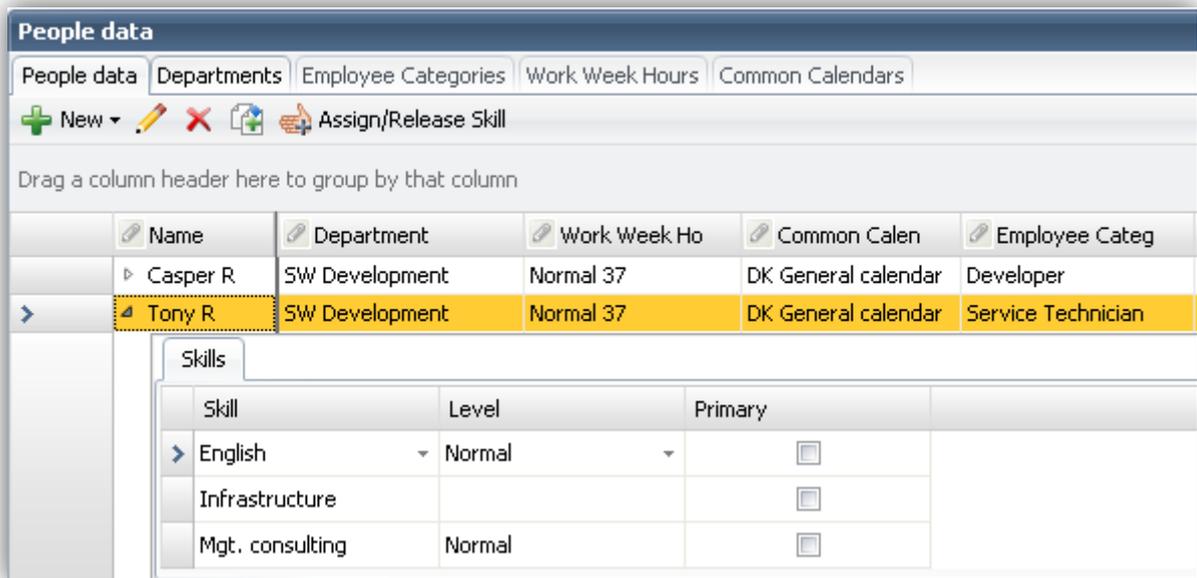
In the lower left corner, select the view "Skills" and define a new skill using the + symbol. Name the skill "Mgt. Consulting". Select the Skill Level to be "Professional"

Note: You can also set skills without a skill level, such as "Interested in travel". This gives a person that skill so it can be clearly seen that they are interested in travelling.

1.3 Define people's skills and levels

Perspective: "People Data".

Select Tony R. Fold out and see the skills assigned to Tony. Click on the toolbar button "Assign/Release Skill". Choose skill "Mgt. Consulting". You can select the level of skill either in the "Assign/Release Skill" dialog by double clicking on the specific skill level or, once you return to the People Data list, you can select the level in the drop down list. This skill is now added to Tony in the People Data view.



You can change the skill level by using the drop down menu for "Level" beside the skill you want to change. You can set any skill to be the Primary skill.

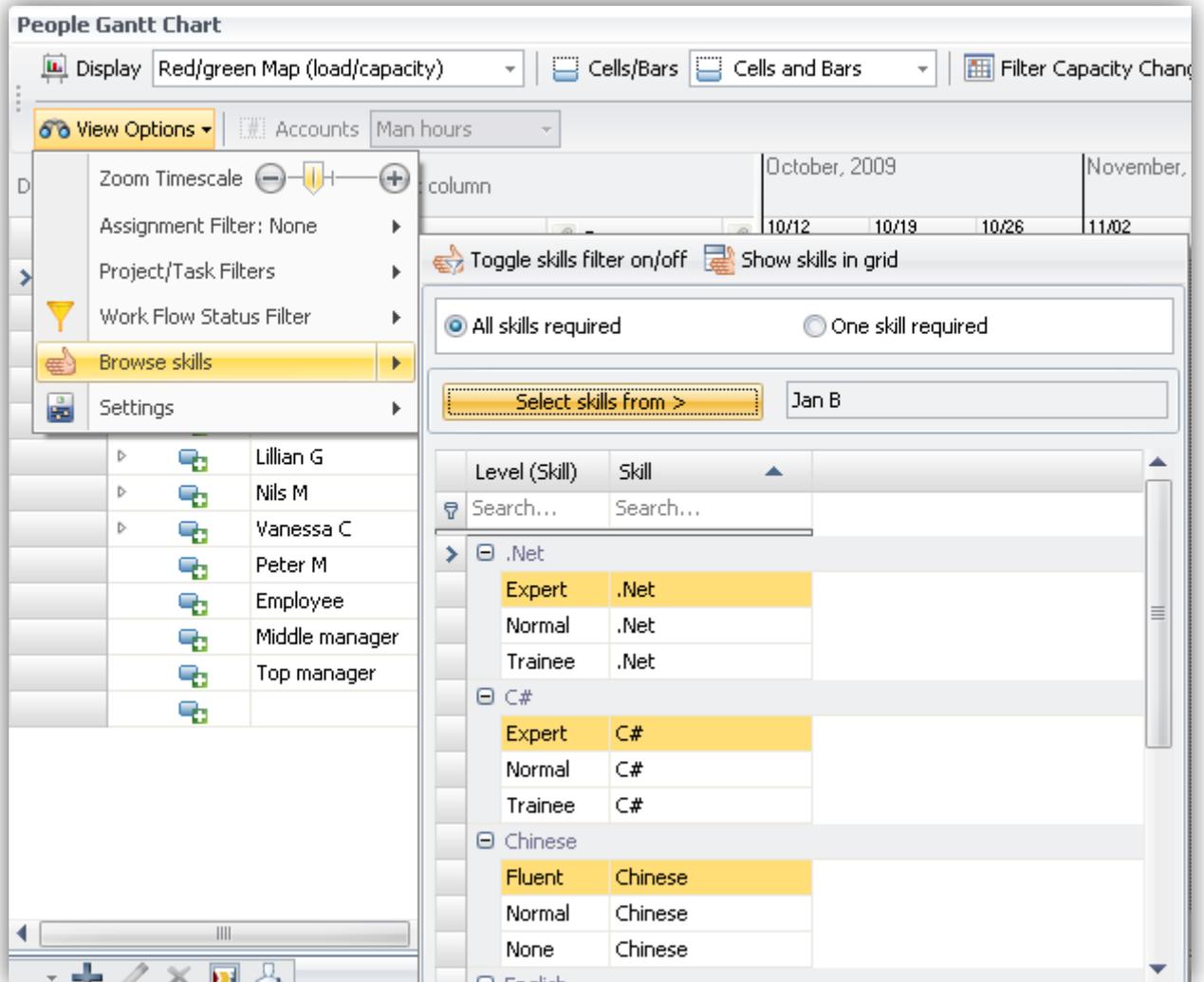
Note: If you want to give multiple people the same skill, you can select multiple people by using the ctrl-button and then choose "Assign/Release Skill" and selecting skills for those people. After, you can adjust the level of skill for each person.

1.4 Skill Selector

Perspectives: "People Assignment".

Purpose: You can see which people have which skills and select people based on skills in the Resource Gantt.

Select the “View Options” drop down in the People Gantt chart and select “Browse Skills”



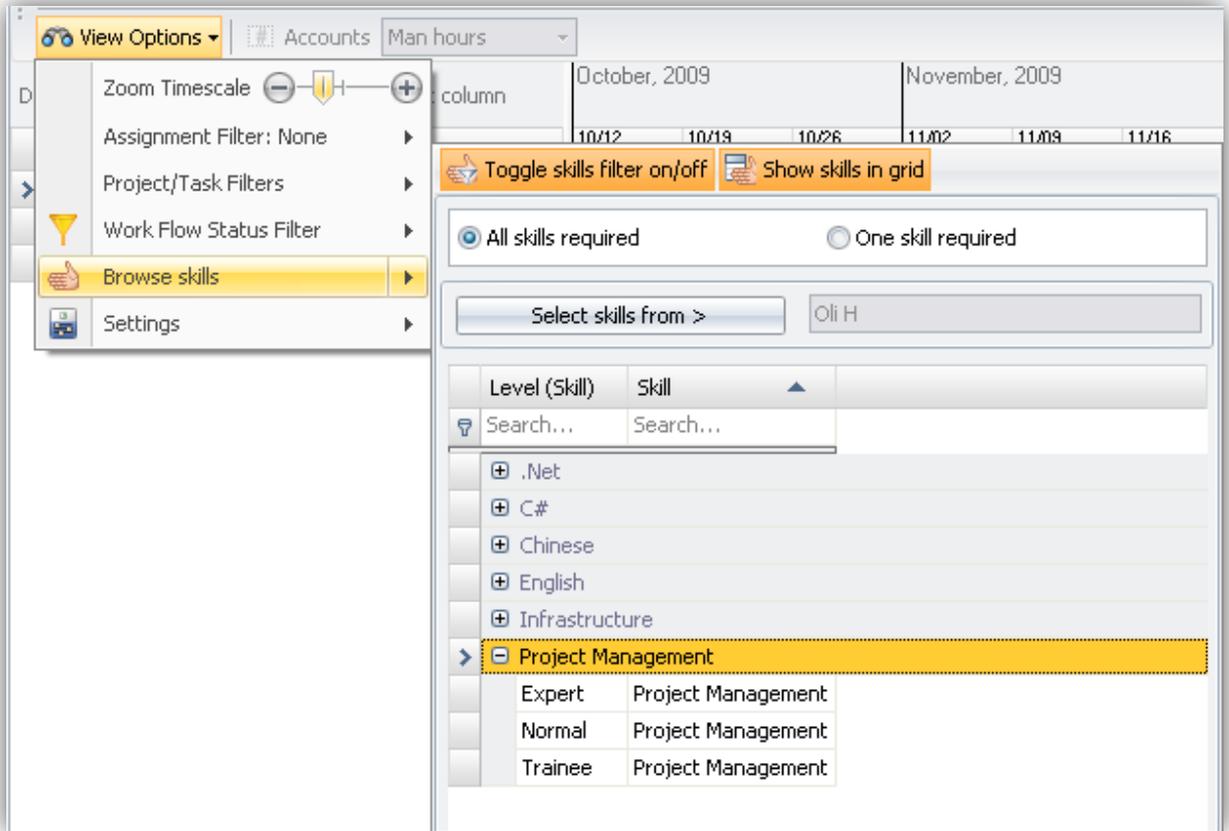
In pop up window select different combinations of skills and skill levels using the Ctrl key to multiple select or deselect. Selecting the button “Select skills from>” will allow you to choose a resource whose skills you want to select. You can then select or unselect skills from this list to see who matches these skills. This is useful in case you need a person to replace someone else in a task but you need the replacement to have similar skills. In this way you can find a person whose skills match that of the person you are replacing.

Alternatively, you can select a task to use for finding people replacements with similar skills. Any people on that task will be used to find the matching skills necessary to replace them on that task. The people on that task will appear in the drop down menu next to “Select Skills From” and you can select which of them you need to find replacements for.

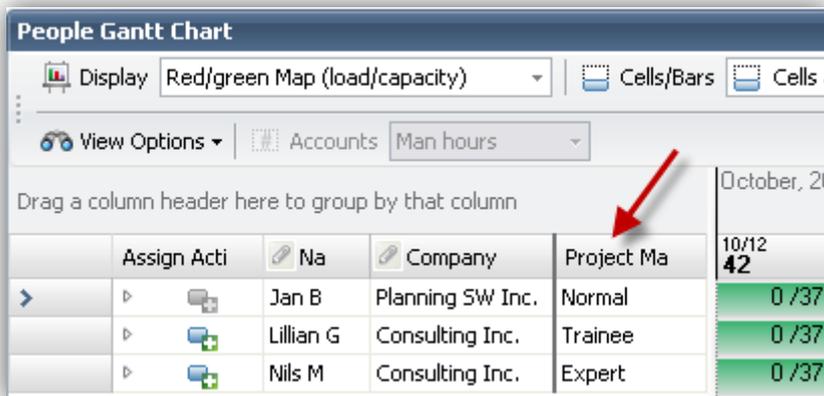
You can choose “All skills required” or “One skill required” to toggle between if all the skills are necessary for the filter or if only one of the skills is needed.

1.5 Using Skills to Assign a Resource

While browsing skills, select “Project Management” as a skill and click on the People Gantt chart view again. The resource list will show the people matching the skills you have defined.



Note that by selecting “Show skills in grid” as is selected in the image above, you add a column to the People Gantt Chart which lists the level of the selected skill.



You can see above, that only the Project Managers are selected when Project Management as a skill is selected in the Browse Skills dialog. You can see that Jan is a Normal level Project Manager, Lillian is a Trainee Project Manager and Nils is an Expert Project Manager.

	Assign Acti	Name	Company	Dep
>	▶	Oli H	Planning SW Inc.	SW
	▶	Jan B	Planning SW Inc.	SW
	▶	Casper R	Planning SW Inc.	SW
	▶	To	Inc.	SW
	▶	Hu	Inc.	Mar
	▶	Lill	Inc.	SW
	▶	Nil	Inc.	Mar
	▶	Vanessa C	Consulting Inc.	SW
	▶	Peter M	Planning SW Inc.	Mar

.Net (Expert)
 C# (Expert)
 English (Fluent)
 Project Management (Normal)
 Chinese (Fluent)

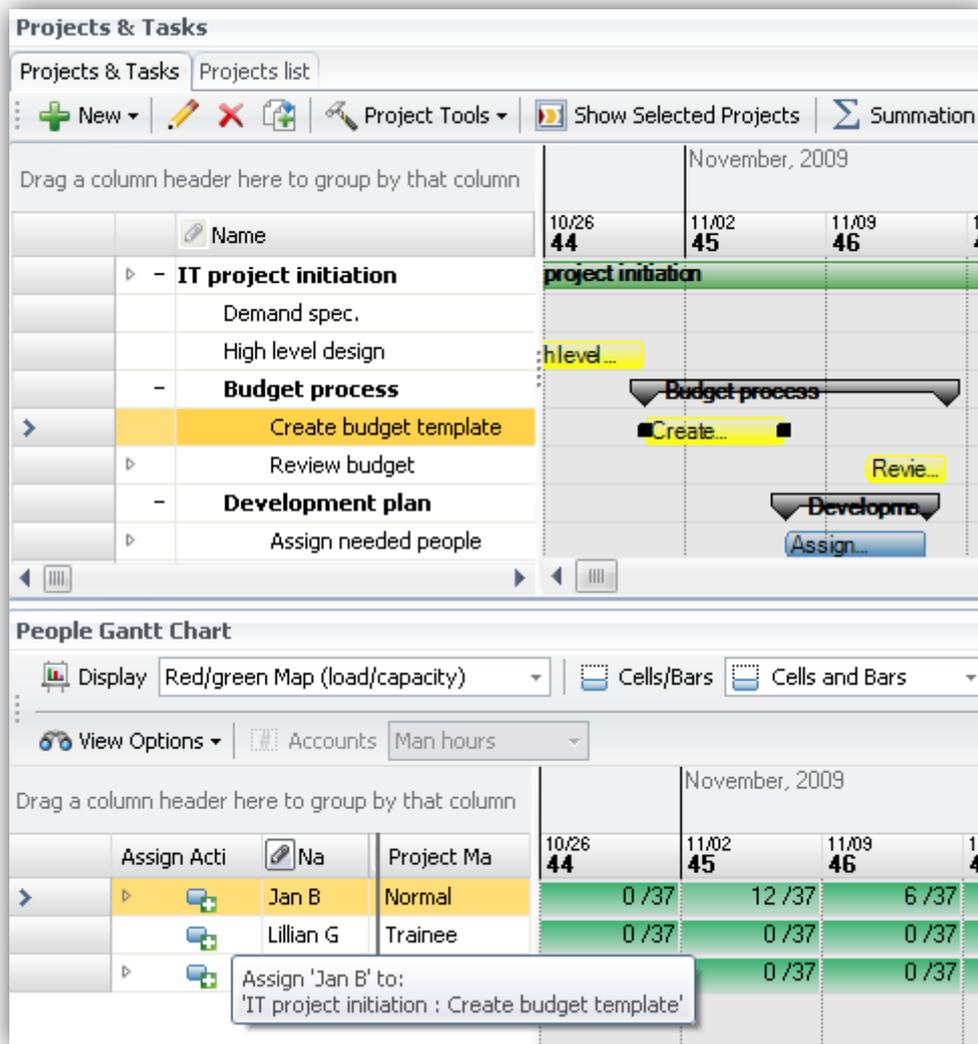
You can also position your cursor over someone's name to see their skills and levels. A tooltip will appear (as above) to show you the skills and levels associated to that person.

1.6 Assign

Since you have selected Project Management as a skill and now have three people showing in the People Gantt chart, you can now assign a Project Manager to your project.

Select task "Create Budget Template" in the Project Gantt Chart.

Select Jan B in the People Gantt chart and select the small blue icon beside his name, this is "Assign" and assigns him to the task you chose, "Create Budget".



You have now assigned a person to a task based on their skill as Project Manager.

Once assigned, the task Create Budget Template will have a small triangle beside it which you can click on to expand and see who is assigned to it. You can add hours in for Jan in the white cells in the Project Gantt chart area.



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