

Work Flow

Managing workflow and work approvals

Purpose: As a Project Manager, assign people as tentative then, as a Resource Manager, approve or disapprove requested assignments.

Example Perspective: "People Data and Project Manager Gantt Chart"

In this tutorial

1.1 Setting up the scene

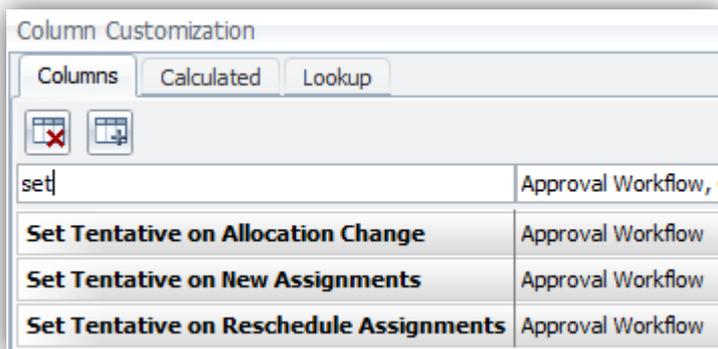
1.2 Managing Work Flow

1.3 Approving as a Resource Manager

1.4 Tentative Jobs List

1.1 Setting up the scene:

To begin Work Flow, we have to set up some columns in the People Data perspective.



Right click in the column area of the People Data perspective and select "Column Chooser". Add the three columns "Set Tentative on Allocation Change", "Set Tentative on New Assignments", and "Set Tentative on Reschedule Assignments".

Select a choice (click the box) for each person that you want to first approve changes made to their bookings. The three types of tentative bookings are:

Set Tentative on Allocation Change: This results in a change of booked hours.

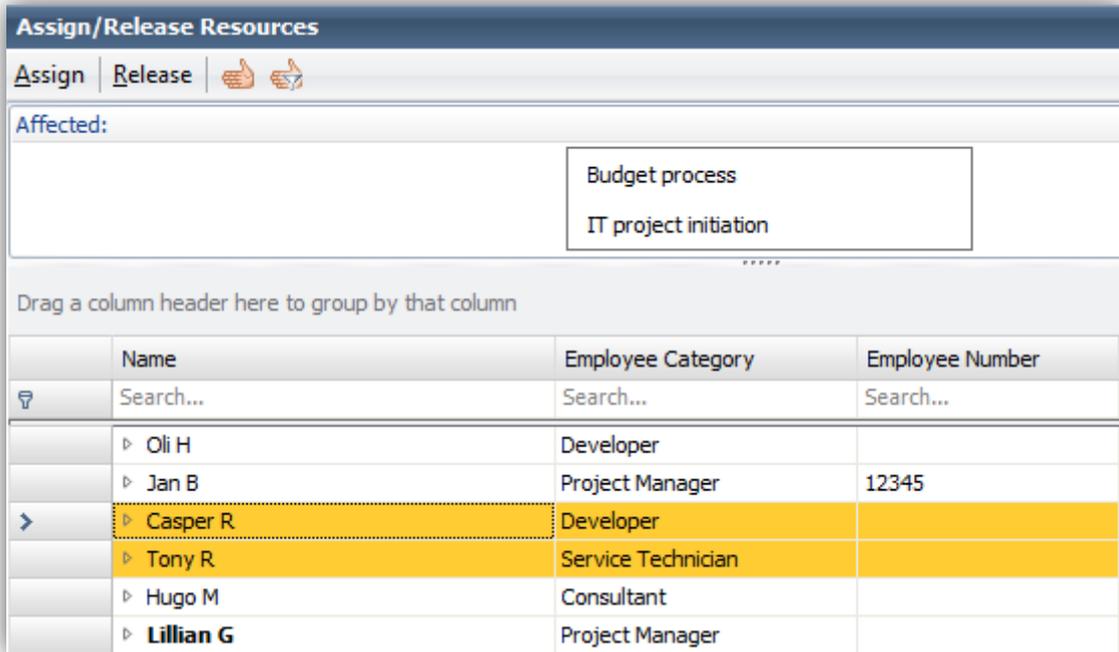
Set Tentative on New Assignments: This is when there is a new assignment that has been assigned hours tentatively.

Set Tentative on Reschedule Assignments: This is when hours have already been entered but the task must be rescheduled to another time.

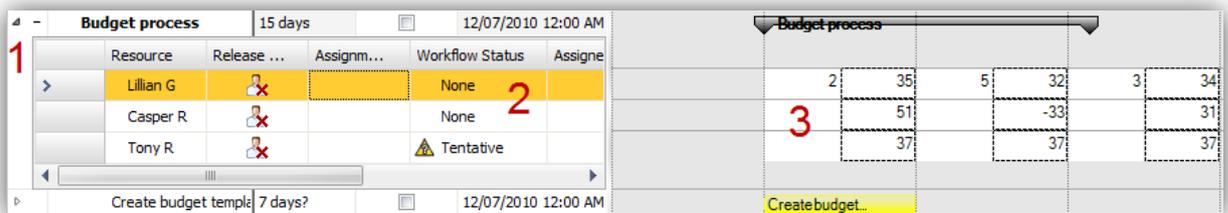
1.2 Managing Work Flow

In the Manage Projects and Tasks Perspective, we'll go through a series of steps to learn how to assign tentative hours and approve them.

As a Project Manager: Select a project, in this case, the Budget Process and assign two people to it:

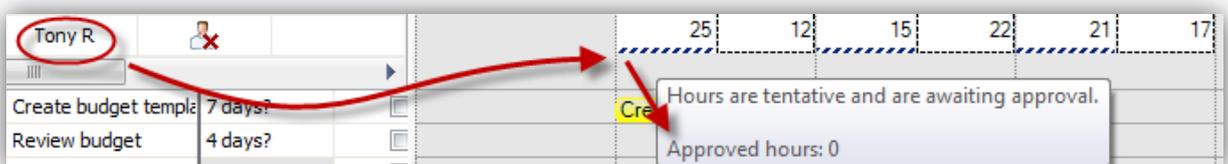


Expand the task to see the assigned people using the small triangle in the corner (1).



As a Resource Manager: Right click on the white area near the resources and select “Show Headers”. Then right click on a column header to access the Column Chooser. Add the column Workflow Status (2).

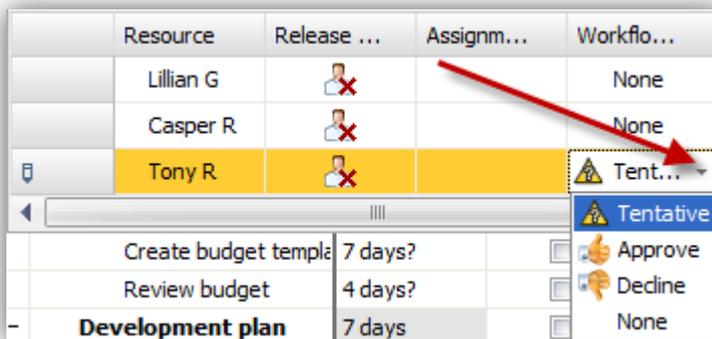
Here you can see that Tony R’s Workflow Status is set to Tentative. This is because he is set to have tentative status on new bookings.



When we assign hours to Tony, you can see that his hours are split into two 25 and 12, 15, and 22, 21 and 17. This indicates hours assigned versus available capacity remaining. When hours are assigned (and enter is pressed) then the newly assigned hours get a small dashed line below them. As the tooltip above indicates, there are zero approved hours, these are only 25 tentative hours assigned.

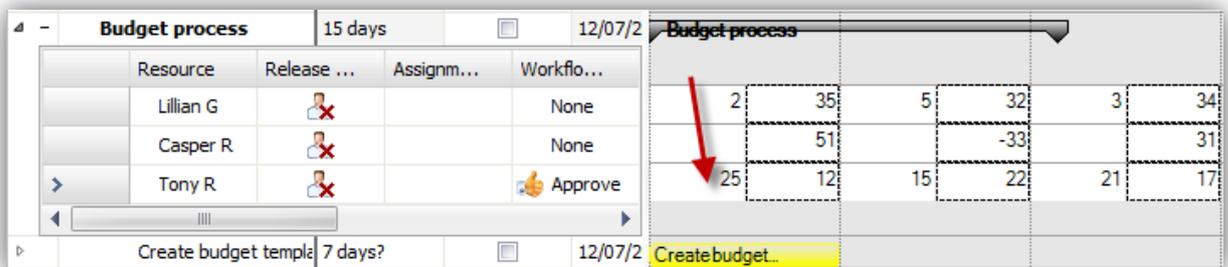
1.3 Approving as a Resource Manager

Click on the column that says "Tentative" next to Tony R's name.

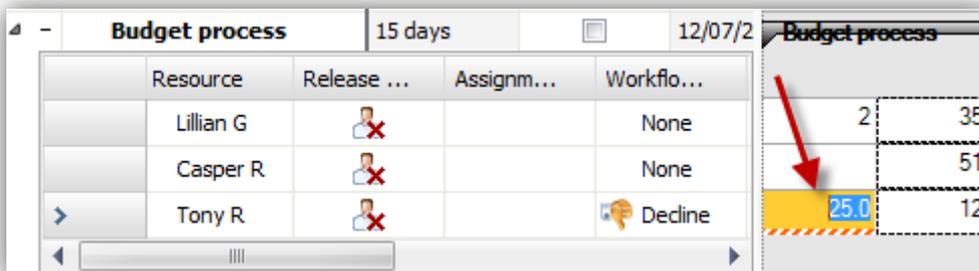


Here you can choose to leave it as Tentative, Approve, Decline, or do nothing.

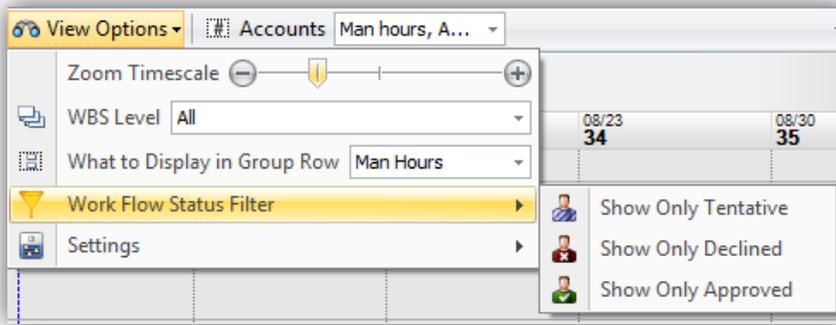
If you choose Approve, the cell turns white (removes dashed line) and is open for editing.



If you Decline, then the dashed line turns red:



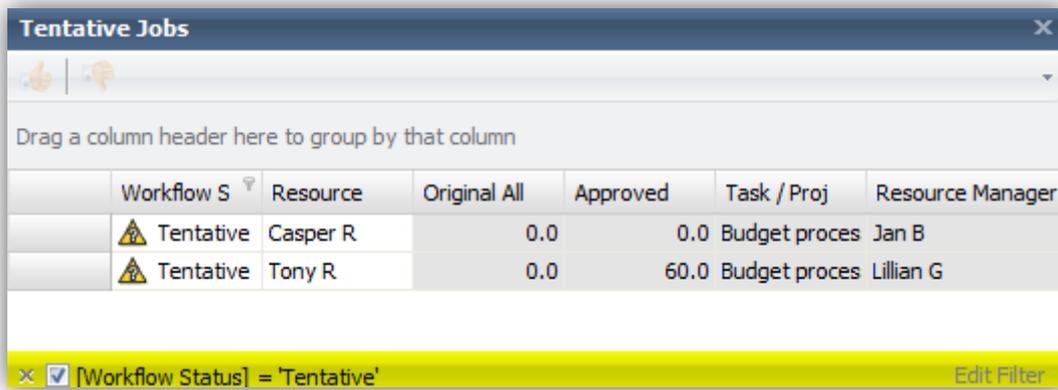
To get an overview of all Tentative, Declined or Approved, the resource manager can also go to View Options and filter on these three options to immediately see which people have Workflow Statuses assigned.



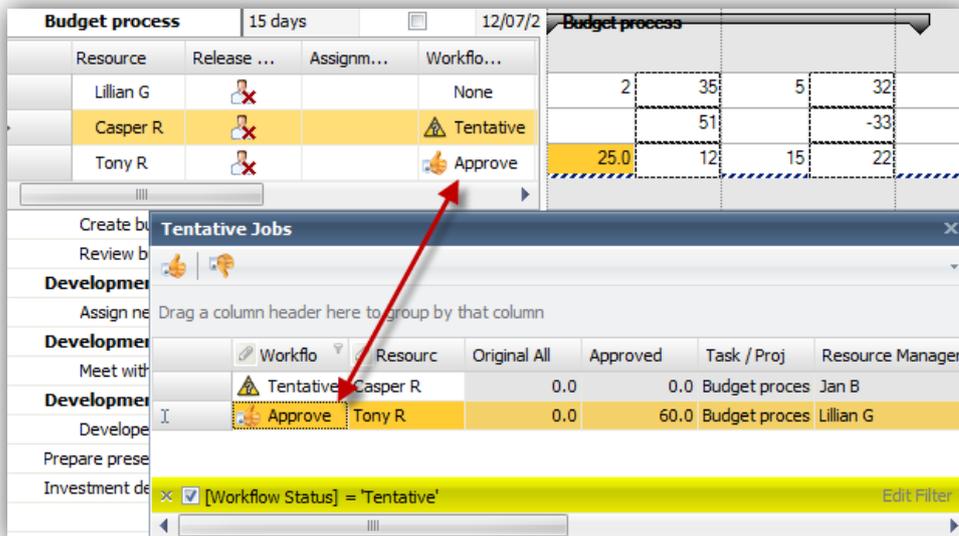
1.4 Tentative Jobs List

As a resource manager, you can also get an overview of tentative jobs using the Tentative Jobs List.

In Views, under the Projects Folder, select Tentative Jobs.



If you make changes to this list (using the Workflow column dropdown), the changes will also show up in the Project Manager Gantt Chart:



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