G 3 How to Allocate Project Participants to a Project

Access level: Project Manager, Director, System Administrator

Learn: How to associate project participants with a project and how to give them a personal budget.

When allocating project participants to a single project:

Figure 1 : Main Menu -> Project Administration -> Search Project -> Edit Project

There are three possibilities:

1. The tab *ALLOCATED HOURS* ❶.
2. The tab *PROJECT TASKS* – the link [Edit] ❷.
3. Clicking on the Task's name ❸.

From the *ALLOCATED HOURS* tab it is possible to view and allocate project participants to any task, and with the link [Edit] you work with one task at a time. Independent of the chosen interface the allocating process is the same:

Figure 2: Main Menu -> Project Administration -> Search Project -> Edit Project -> Edit Task

- Select an employee from the drop down menu ❹.
- On the tab *ALLOCATED HOURS* the task list is updated. Only tasks where the employee has not yet been allocated time will be shown. Select which tasks the employee should be allocated to.
- Enter the number of *Hours* ❺ that should be allocated to the employee.
- Select an *Hourly Rate* ❻.
  The hourly rate is the customer's cost price while the internal cost price (not shown) can be found in the employee's key information that is found in System Administration (F10) -> Employees.
- Click on *Update* ❼.

Besides allocating employees one at a time, it is also possible to allocate groups of employees on one task, or to allocate one employee on several tasks at once:

- Click on the link [To multiple employees...] ❽, if you want to allocate several employees to one task.
- Click on the link [To multiple tasks...] ❾, if you want to allocate many employees to one task.

Please note: On fixed price tasks the hourly rate is automatically calculated.

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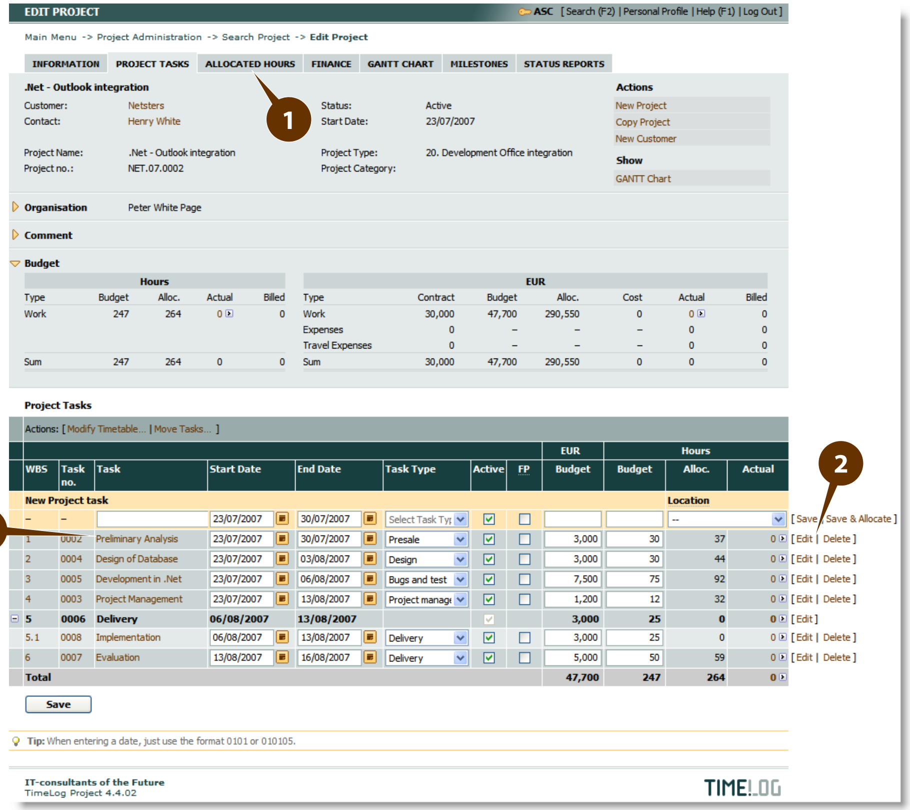

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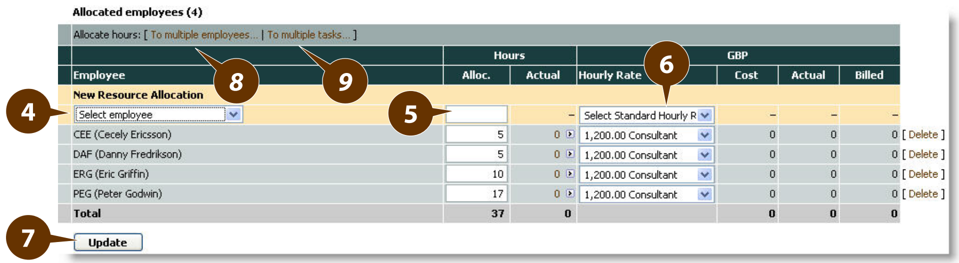

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