

G3 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...] ❸, if you want to allocate several employees to one task.
- Click on the link [To multiple tasks...] ❹, if you want to allocate many employees to one task.

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

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

The screenshot shows the 'EDIT PROJECT' interface with the 'PROJECT TASKS' tab selected. The interface includes a navigation bar, a header with 'ASC [Search (F2) | Personal Profile | Help (F1) | Log Out]', and a main content area with several tabs: INFORMATION, PROJECT TASKS, ALLOCATED HOURS, FINANCE, GANTT CHART, MILESTONES, and STATUS REPORTS. The 'PROJECT TASKS' tab is active, displaying a list of tasks with columns for WBS, Task no., Task, Start Date, End Date, Task Type, Active, EP, EUR Budget, Budget, Alloc., and Actual. A callout '1' points to the 'Edit' link for the task 'Delivery'. A callout '2' points to the 'New Project task' button. A callout '3' points to the task 'Delivery' in the list.

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

The screenshot shows the 'Allocated employees (4)' interface. It features a table with columns for Employee, Hours (Alloc., Actual), Hourly Rate, GBP (Cost, Actual, Billed). A callout '4' points to the 'Select employee' dropdown menu. A callout '5' points to the 'Hours' input field. A callout '6' points to the 'Select Standard Hourly R' dropdown menu. A callout '7' points to the 'Update' button. Callouts '8' and '9' point to the links '[To multiple employees...]' and '[To multiple tasks...]' respectively.