Assignments

Overview

Assignments are the basic building blocks of project work. Assignments serve both to define planned future work and to provide a record of completed work. Each assignment document specifies something that is to be done by a specific participant on a specific project.

Assignments are created in a few basic ways. They are created when an externally defined project plan is published and synchronized. They are created manually by users, and they can be created semi-automatically as part of the work request process.

Assignments generally persist for the life of the project and are removed from the repository when the project is archived at the end of its life.

Specific assignments may be of particular interest to management. These are called Key Events. While any assignment can be marked as a Key Event, the common use is for identifying project milestones.

Coworkers

When more than one person is needed to accomplish a single task, each individual will be called a "coworker" and will have a separate assignment document. These documents will, however, be linked to one another so that one person can see the status of the work of the others.

Dependencies

When one assignment is logically sequenced with others, the assignments are said to be dependent upon one another. The connections between such assignments are called "dependencies". Those assignments that are expected to be done before are called predecessors, and those that are expected to start after are called successors.

These relationships are shown as links between assignments. Such links are usually created in graphical planning tools, but can be created manually when the assignments are manually entered.

Note that Project Gateway displays but does not enforce schedule dependencies. You can always report the work that you have done even if it was not done in the order that it was planned to be done.

In addition to the normal dependencies among tasks within a project, Project Gateway also provides InterProject Dependencies between key events in separate projects.

Methodology Document Tracking

Assignments can also be linked to the production of project documents such as specification. You can specify what documents are supposed to be available before the assignment begins, and what documents are expected to be created by the work of the assignment. The Project Gateway system will proactively remind managers of these obligations so as keep the results of the project flowing. This is a key function for supporting all kinds of methodologies.

Related Documents

Assignments can also be created in concert with issues, risks and scope changes and linked for accounting purposes so that the time spent investigating and solving these items is logged against the subject. When this is done, the documents are cross connected and linked to one another.

The Project Assignments Navigator

This navigator provides an action for creating new assignments and access to many useful views of assignments organized by person, by person grouped by project, and by project outline.

Assignments by Person - these views show assignments in date order across all projects. Note: Participants are grouped by organization hierarchy.

- **All by Date** Assignments are sorted by start date (actual start date for started assignments, scheduled start date for unstarted assignments.) This view also shows a red punchcard icon next to the start date for assignments that have been specifically marked to not appear on timesheets.
- **Completed** shows those assignments that have an actual finish date.
- **Future** shows those assignments that do not have an actual start date, but whose planned start date is in the future.
- **Overdue** shows those assignments that do not have an actual start date, but whose planned start date or finish is in the past.
- **Underway** shows those assignments that have an actual start date but not an actual finish date.

Assignments by Person by Project - These five views are similar to the previous, but provide and addition level of grouping for each participant by program and project name.

Assignments by project outline - these views show assignments in the outline structure of the project plan with all the summary headings defined in the project. If you want to see all the assignments in a particular project, you use these views. Projects are grouped by program hierarchy. Note: When assignments have been manually entered into the database, they will appear under the special heading of "Additional Tasks" at the end of the outline for that project.

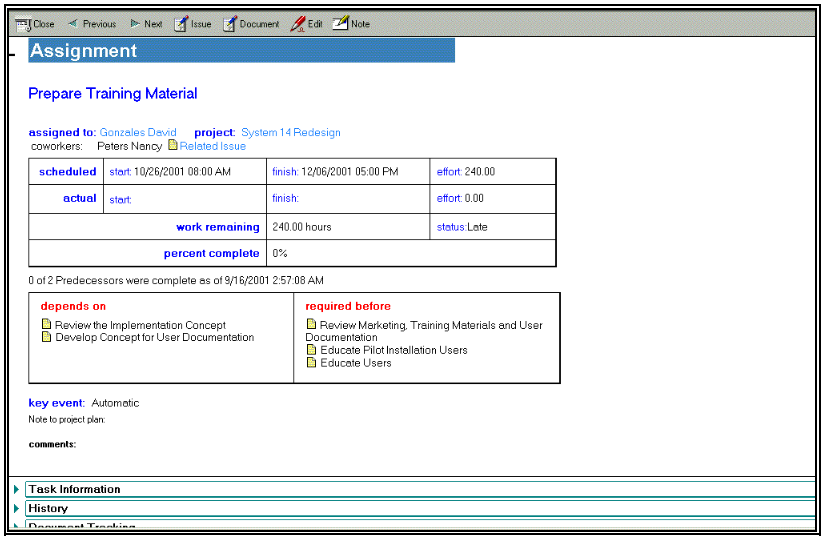
w/Hours shows remaining and actual hours, status, percent complete, capitalized hours, and an indicator in the form of a currency note that indicates that the time on this assignment is marked for capitalization. This view provides totals for effort at each level.

w/User Revisions and Notes shows those assignments where the scheduled start or finish has been manually changed since the assignment was published. It also shows those assignments where the "note to project plan" field has been filled in.

When a project is imported the phases, subphases, and tasks of the project plan are given numeric prefixes such as 001. This is done because Notes sorts its views alphabetically. It is important to understand that the phases, etc. do not exist as documents in the database, they are only used as codes to sort and classify the assignments. The database views provide subtotals of planned and actual work for each of these levels of categorization.

Assignments by Project - this is a single view that is sorted by project then by person. It shows columns of start date, actual work done, capitalizable work done, the capitalization icon (currency note) and the exclude from timesheet flag (red punchcard).

Using the Assignment Form



The assignment form divides into several sections. Most of the time, you will only be concerned with the information shown at the top of the form.

TaskName

The name of the task is shown in large type. The taskname is set when the assignment is created and not changed. If, however, the assignment is linked to an external plan, the name can be changed in that plan and updated during synchronization.

Special Status Messages

If the assignment is part of a project that is not currently approved for implementation (which can be because it is still a proposal, or because it is marked as finished or canceled or on hold), a message will appear below the taskname telling the user that this work item should not be done. (An example can be found in the Projects chapter under the section dealing with approval.)

If the assignment was previously published, but was later removed from a project plan, is no longer part of the current project plan, a message appears announcing that fact. Assignments that display this message are called "Obsolete" assignments. These do not appear in the normal assignment views, but do appear in a special view called Obsolete Assignments which is found on the Reports Navigator.

Assigned To

This shows the name of the participant who is supposed to do the work. Clicking on this name will open the participant profile. If coworkers are involved, they are shown as series of name with doclink icons. Clicking on those icons will open the co-workers assignment form.

If the document is edited, the assigned to name can be changed to that of another participant.

Reference

A labeled doclink will appear between the participant and project names if the assignment is linked to a work request or to a task help database.

An Example of a "reference link" used to point to the originating work request.

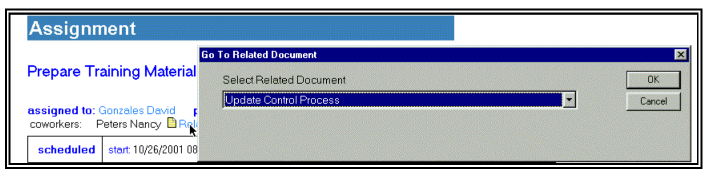
Project

This the name of the project is shown. Clicking on this name will open the Project Profile document.

Related Documents

If any issues, risks, project documents, or scope changes have been created from this assignment, or if the assignment was created from any of those documents, there will be one or more "Related" links.

Clicking on any of these will, in Notes, open a dialog which will list the related documents. Selecting a title and pressing OK will open it.



Clicking on the item in a browser will immediately open the related document.

When an assignment is related to an issue, risk or scope change, the actual hours reported for that assignment will be added to the total hours spent on the issue, risk or scope change and will be added to the special subtotal for these categories maintained on the Project Profile document.

Work Details Table

This table shows both the scheduled and actual information. Scheduled start, finish, and effort are imported from the project management plan or entered when the assignment is manually created.

Actual start, finish, effort, percent complete, and work can be entered directly on this form, or via the Time Sheet facility, but you should not use both on a single assignment.

When working with external project plans, the planned dates are provided by those external tools, so that changes made to the planned dates will not have any effect on the external project plan. Conversely, actual dates and actual effort are normally entered using the database and are transmitted to the project plans during synchronization. Changes made in actuals in the project plan will not be transmitted to the database.

The one really special field is work remaining. It can be changed by both the database user (generally via a timesheet) and also by the project leader.

Dependencies Table

If the task is interconnected to other tasks, doclinks to these assignments will appear. Although a task may have several assignments, only one doclink will appear for each predecessor or successor task.

New dependencies are created using the *Dep* Action button. This will only appear on manually created assignments, and only if you are the project managers.

Predecessor Status Message

If the Assignment Tracking agent is running in your repository, a message appears just above the dependencies block showing the number of predecessors already completed and the date at which this was determined. Unless the number of completed predecessors changes, this message will not be updated.

Key Event and Milestone Indicators

If the task is a milestone in the project plan, a message appears to the right of the Key Event Field. A key event is a concept used by the ProjectGo! System to help the project manager monitor important aspects of the project. Normally, milestones are key events automatically. However, you can force any assignment to be a key event by setting this field to Yes and prevent it from being a key event by setting the field to No.

Note to project plan.

This field is provided for you to make a short comment to the person who is maintaining the schedule. These comments are embedded in the note field of the project plan during synchronization. These comments are also displayed in the *outline w/user revisions* view so that database users can see them.

Comments

This is a rich text area where you may detailed task instructions specific to this assignment.

Task Information Section

Tasknote

This is a text field that is filled from the note field in the project management application.

Work breakdown code

This field is filled from the WBS code of the project management application. It is normally unused for manually created assignments.

Hierarchy

This is a list of the summary headings in the project plan to which this assignment's task belongs.

Options

There are two options that can be manually set on any assignment.

Timesheet Include Option

Timesheet can be set as Normal or Exclude.

If Exclude is set, the assignment will not appear on a new timesheet and a red icon will appear to the right of the task name in the Assignments by Person All by Date view.

Capitalize Work Option

Capitalize can be set to Yes or No.

If set to Yes, then any actual hours reported on this assignment will be included in the total of capitalized hours shown on the project profile as "cap".

In addition, the actual hours will be shown in the **Cap Hrs.** column of the project assignments outline w/ hours view and the capitalization icon (a currency note) will appear on the same view.

History

Progress History

This is a list showing one line for each recording period (usually weeks) during which work is done on the assignment.

You do not enter into this field, it is maintained automatically whenever you edit the work details or when your Time Sheet is posted. This becomes a tabulation of hours worked by week on the assignment.

Special entries are made in this list for timesheet corrections and by the Virtual Timesheet process when no work was done.

The format of these lines is very simple. They begin with the period number (period=), then the actual work done in that period number (work=), then the remaining work (togo=) as of the end of that week and the percent completed (complete=) as of the end of that week. If created by timesheet posting, this is followed by data in the form "details=0:0:120:0:0:0:0" that records the minutes of actual work for each day of the week. The record ends with a note enclosed in { }'s showing the calendar week ending date.

The period numbers are assigned by the system as the relative week number from a fixed starting date (normally Jan 1, 1990).

Revision History

This displays the log of changes made to this assignment from the project management schedule. This is not used for manually created assignments.

Each entry shows the date of the update, the workplan file used, and what changes were made to key parameters.

Edit log

This is a list maintained automatically which shows who has been editing this document's status and what status changes they have made. This shows only changes that affect the status of the assignment. It shows posting by timesheets and changes made manually.

Notifications

This shows what messages have been sent by ProjectGo! agents to the participant or project manager about this assignment. When editing, a button appears to allow you to remove the records of messages sent so that the system can send them again.

Document Tracking

The document tracking table lists the types of project documents that are created by this task and required by this task. Usually these will be preloaded by the project manager when the project is published, but they can also be entered manually. Read the chapter "Using Document Tracking" to get a better understanding of how these entries are used.

Actions on Assignment Forms

Previous - to display the previous document in the view.

Next - to display the next sequential document in the view.

Reassign - to change the participant assigned to the task. See the section below.

Locator (string) **-** to add the document to your personal locator page as a favorite

Create **Issue -** to create a new Issue for this project which will be linked to this assignment.

Create **Document -** to create a new Project Document (in any of the available formats) which will be linked to this assignment.

Edit - to enable editing of the document. This may not appear if you do not have the right to modify the assignment.

Note - to send a message to the assignee, project manager or the user's personal journal about the assignment.

Web Assignments also have an action called "**New Coworker**", the same function is available to Notes clients using *the Create* **-** *Additional Assignment* menu action.

Manually created assignments also have the action "**Dep**" to create dependencies and the action "**Delete**" to remove the assignment.

Editing an Assignment

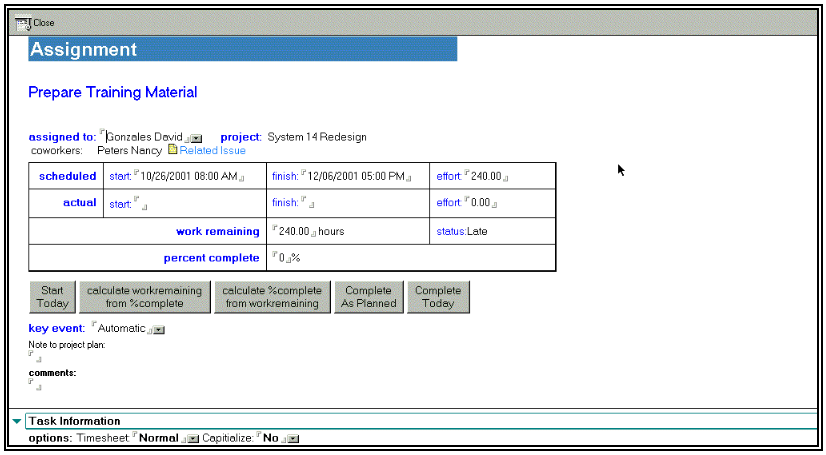
You can edit assignment documents to make comments, set options, enter document tracking requirements, and report work status.

Note: If you are a Time Sheet user, then make all your status reports via the timesheet and do not modify the work details of assignment documents directly.

Editing in Notes:

When you edit, buttons appear under the Status area to let you quickly set the actual date, percent complete, and work remaining. **Note:** You must always enter the actual hours worked. Setting the task as done does not automatically set the actual hours.

You should enter the time as well as the date for actual dates. Many project management systems have difficulty dealing with times outside the normal workday. Also, before you save the document, review it for accuracy. The assignment form checks that the start is before the finish and that percent complete is 100% for completed tasks, but it does not prevent you from entering a wrong year or 2850 hours when you intended to enter 28.50. The project manager, however, may be quite surprised at the result!

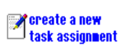


Editing using a browser

Editing assignments from browsers is similar to doing it in Notes with the exception that there are no shortcut buttons for updating progress. You must manually enter actual dates, effort, percent complete and work remaining. If you use timesheets for weekly reporting, you should not enter status directly into assignments.

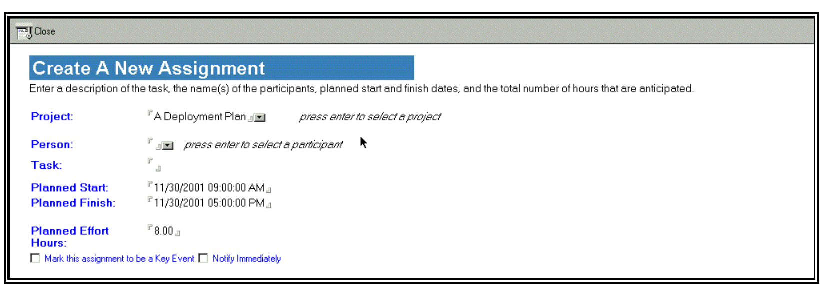
When you press the submit button at the bottom of the form, a response page will appear with links to Repository Center and other navigators.

Creating New Assignments

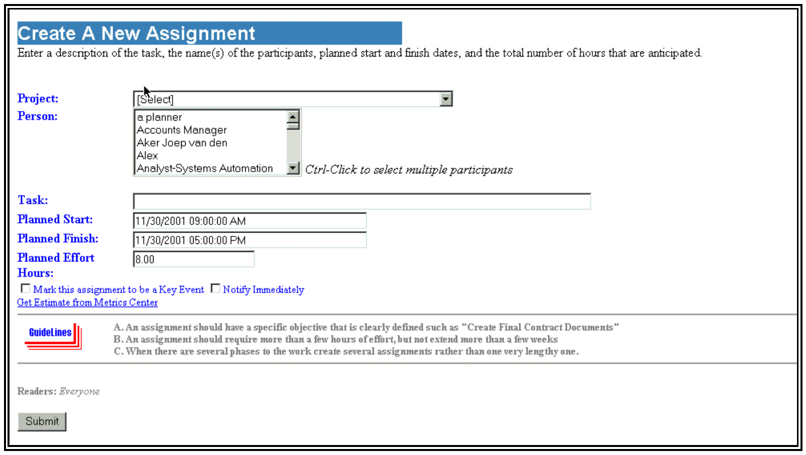


You can compose new assignments directly into the database, without using a project scheduling application. The Create A New Assignment Form collects the information required for new assignments.

Note: The project and participant profiles must be created before you can create an assignment.



New assignment Form (Notes)



New assignment Form (Web)

Project

You must select an existing project.

Person

You may select one or more participants.

Task

You must enter a task name.

Dates and Effort Hours

You must have start and finish dates and the number of hours of effort planned for the assignment.   The task is scheduled for tomorrow by default.

The total time specified for the work will be divided equally if several participants are selected.

[ ] Mark as Key Event

Mark as key event will make this assignment a key event for the project.

[ ] Notify Immediately

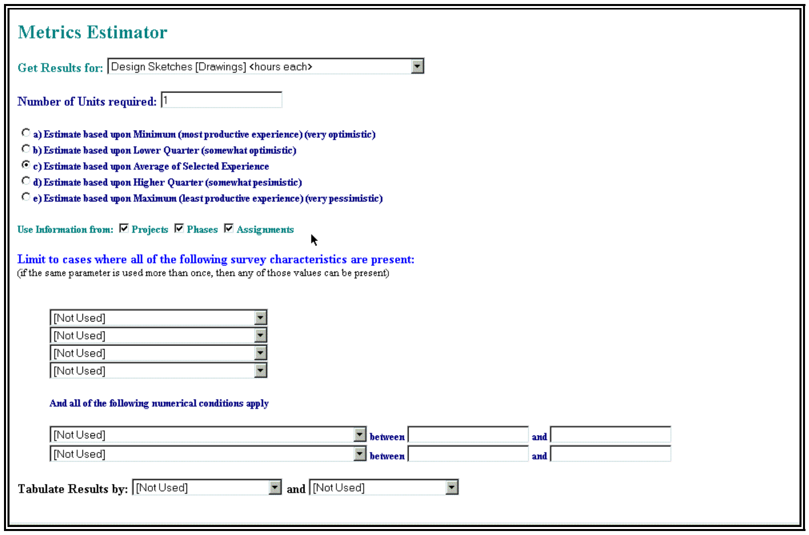
Notify immediately will direct the system to send an immediate email to the participants you have assigned telling them about this new work. The email will contain a link to their assignment document.

Once you save (or submit) the document, the assignment can be found using any of the Assignment views. When reopened, the normal Assignment form will appear. New assignments will appear at the bottom of the project in the project outline views with the heading of "Additional Tasks".

Get Estimate from Metrics Center (Web Only)

This will appear only if the Metrics application is installed and it's URL has been set in the Repository Administration form. This will open the Metrics estimate form to allow you to find examples of previous work.

While this link appears only to web users, Notes users can easily open the metrics application and use the same estimating tool.



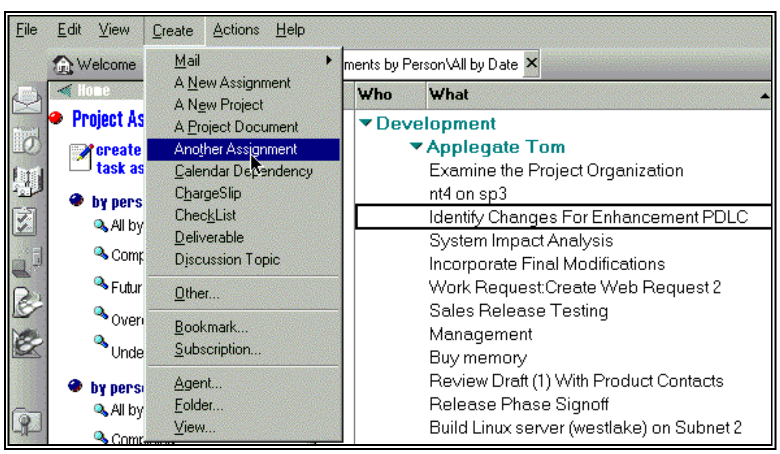
Metrics Estimate Request Form (Web)

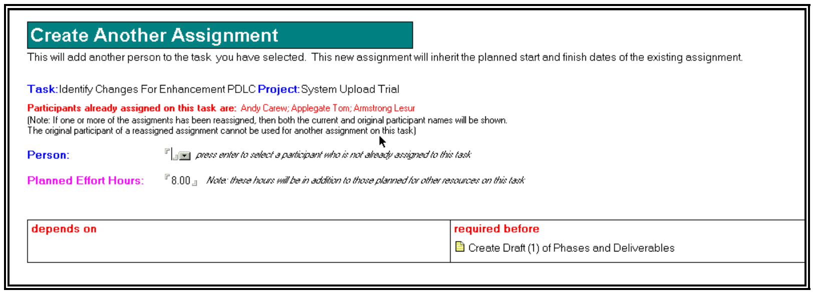
Adding Additional Assignments to Existing Tasks

In a Notes Client

Step 1: Open the project outline view to the project and task.

Step 2: Place the view cursor on one of the existing assignments of that task and select the Notes menu command "Create Additional Assignment". This will display the Additional Assignment form with the task and project name displayed. Below this will be listed the individuals already assigned to this task.





Step 3: In the Person field, select a participant for the assignment. The list that is displayed will exclude those people already assigned to the task. Project Gateway will not allow you to make two assignments of the same person to one task.

Step 4: Set the work hours for this person. Close and save the form. The new assignment will appear in the Outline view for that task.

The hours specified in the new assignment form will increase the total hours remaining for the task. If you wanted to shift some of the work of another person to this one, edit the other assignment to adjust the work remaining.

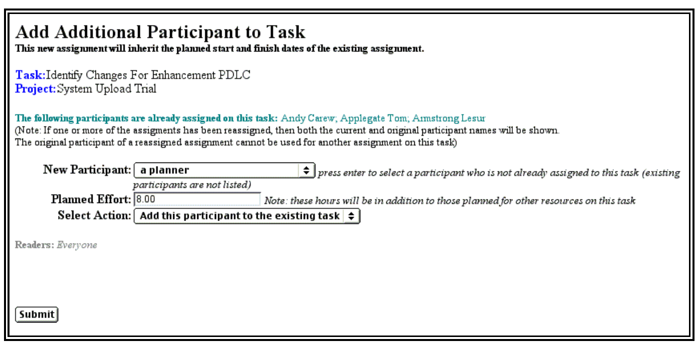
The start and finish dates will be set to be the same as those in the assignment that you started from.

When the Notes database is Synchronized (Update Project) with the project plan, the new assignments will be added to the existing task in the project plan.

In a web browser

Open the existing assignment and click on the "New Coworkers" action.

This will display a form allowing you to specify the new people (one or more.)



When you submit this form, the new assignments will be created and doclinks will be constructed on all assignments linking them to each other.

Adding Dependencies

Only the project manager can add or dependencies, and only on those assignments that have been manually created. Dependencies on assignments created in project planning systems should be modified in those systems and synchronized.

Dependencies are created and modified using the *Dep* action button that appears automatically when a manually created assignment document is displayed for reading by a person whose UserID is recorded in the Project Profile as a manager for the associated project. Note: It does not appear when the document is being edited.

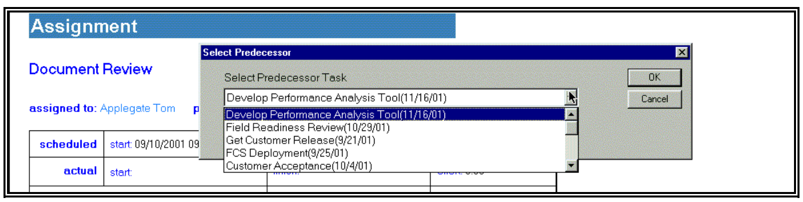
The system will not allow you to create a circle of dependencies. When you create a dependency, the system limits your choices to assignments that are not already dependent upon the current assignment.

Why is this function limited to the project manager? When a dependency is created, both the current and the predecessor assignments and all the coworkers of each are modified to display the links. A participant would not normally have access rights to all of these documents, but the project leader will.

Creating a dependency using the Notes Client

1. Click on the *Dep* Action.

A dialog box will appear. In this list will be all possible predecessor tasks listed by name and date and any existing dependencies listed with the word "Remove".   Select from this list and press OK.



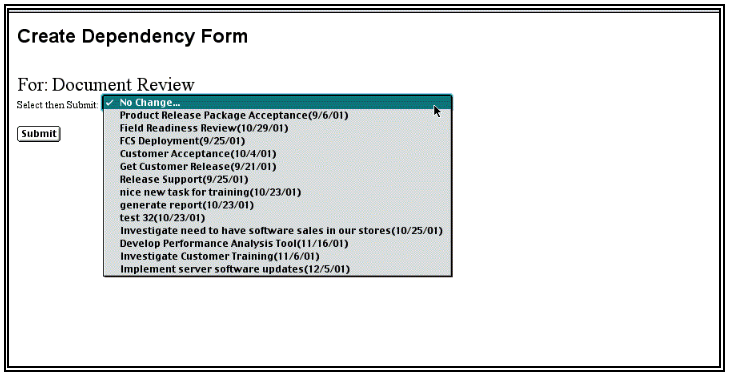
2. The system will respond with a dialog box showing the latest date of any predecessor. This really ought to be prior to the start date of your assignment. If it is not, you should change your assignment or reconsider the dependency.

3. Close and reopen the assignment document. The new dependency will appear in the "depends on" table with a doclink to the predecessor.

Creating a dependency using a browser

1. Click on the Dep Action.

A form will appear listing all possible predecessor tasks listed by name and date, and any existing dependencies listed with the word "Remove". Select from this list and press Submit.



2. The system will respond with a confirmation dialog box showing the latest date of any predecessor. This really ought to be prior to the start date of your assignment. If it is not, you should change your assignment or reconsider the dependency.

3. Submit the confirmation and the assignment will be redisplayed showing the new dependency in the "depends on" table with a doclink to the predecessor.

Reassigning Participants

You can change the participant assigned to a particular task by editing the **assigned to:** field of the Assignment document. This is designed so that you may plan with "skills", but then execute with real people without changing the project plan. It can also be used to change the person assigned to the work in the repository.

1. Open the Assignment document for editing.
2. Position the cursor on the **assigned to:** field.
3. Press **Enter** in this field to display a selection dialog listing all participants in the database. This list will also show the original assignment made in the project management system at the top of the list.
4. Select the new participant for the work and press OK.
5. Save the document.

A list of all reassigned work will be shown in the Reassignment Views on the Participants and Projects Navigators.

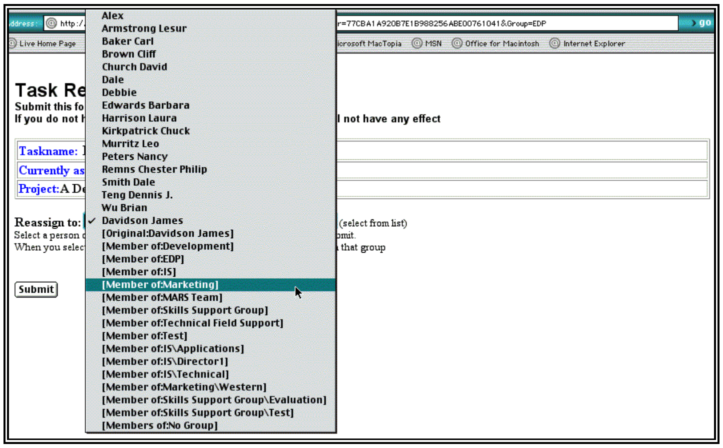
You can restore the original assignment at any time by selecting the top element in the list.

Note: The reassignment applies only to the Repository. When you synchronize, the actual work, if any, will be reported against the original resource. While you can use this to move work planned for "Bill" to "Tom," the work will always be reported against the original assignee in the project management system.

If you want to add Tom to the task, create an Additional Assignment for Tom. Project Gateway will then add Tom as a second resource on the task during synchronization.

Reassigning using a Web Browser

When an assignment is displayed for a browser, the "Reassign" action will appear at the top of the form. Selecting this action displays a transaction form which lists other participants in the organization to which the assigned participant belongs and all other organization names.



When you select a participant and submit this form, the original assignment will be redisplayed with the new participant. When you submit this form with a [Member of ...] selected, the Task Reassignment form will be redisplayed with a new drop list containing the members of the selected department. This allows you to select people using the organization structure.

Other places to find particular assignments

The **Key Events** views show those assignments whose status will be automatically included in status reports and in management summary charts. These can be accessed from the Projects and Participants navigators or in calendar format on the Graphic Charts navigator.

The **Obsolete Assignments** view shows assignments that have been deleted from the project plan. These are retained in the database because they may have actual work hours or important comments or attachments. This can be accessed from the Reports navigator.

Workload Views

The Workload navigator provides access to the Forecast views and the Time Summary views. Every six months, in January and July, the workload navigator will change automatically to provide views for the appropriate time periods.

Forecast Views

The workload forecast views provide monthly tabulation of work remaining to be done in that month according to the published schedules. These are extremely useful in evaluating the realism of project and group commitments. However, they always reflect the current schedule as published in the repository. Frequent synchronization should be done when plans are changing rapidly. Note that actual work done is not shown in this view, only work remaining to be done.

Note: The workload forecast views provide monthly projections. There are other reports available in the system that tabulate planned work on a weekly basis for specific projects, programs, participants and organizations.

The workload forecast for each period is calculated in the following way. The duration of the task is computed (in elapsed days). The duration of the period is computed (in elapsed days). If the task is not started, the planned work of the task is multiplied by the fraction of the calendar days falling in each time period divided by the total duration of the task to compute the workload for a period.

If the task has an actual start, but is not actually finished, a projected finish date is computed. This projected finish date is the end of the last actual period for which progress has been reported plus a fraction of the original planned duration adjusted by the ratio of work remaining to planned work. The workremaining of the task is then prorated for the part of the time between the actual start and the projected finish that falls within the current period.

There are two workload forecast views that show the same monthly totals, but are categorized and subtotaled in different ways.

Participant\Workload Forecast - shows workload by month, totaled by organization and subtotaled by participant. In a simple example like this, there are no organization codes defined for the participants, so the first level of the outline is the participant name. In a larger database, the first level of the outline will be by location or department. In that case subtotals will be created for each level of the organization.

Project\Workload Forecast - shows workload by month, totaled by program and subtotaled by project. In this example there is only one small project, but in a larger database, projects can be organized into one or more levels of programs. Subtotals will then be created for each program level as well as for the project.

How Virtual Timesheeting affects the workload forecast results

When Virtual Timesheeting is active, the system will update each assignment with a notation in the progress history showing the last week for which NO work was done.

The system does this by simply finding the most recent timesheet for each participant and updating all of the tasks that should have been worked on based upon their scheduled dates, but which were NOT reported on the timesheet as having actual work.

If the participant does not file timesheets, then this function will have no effect.

By recording dates on which it is known that tasks have not yet been started, the workload forecast view can safely assume that all of the planned work must be done after this date, and hence to move overdue work into the near future for the purpose of workload planning.

The Virtual timesheet function does not change the dates recorded in the assignments, it only provides this additional status information so that the workload forecast can show this pending (and really overdue) work in the future rather than showing it in the past. This provides a more realistic view of the true current backlog facing a department or participant.

Time Summary Views

The Workload Navigator's lower section displays the Time Summaries views. Each of these 8 views shows the week by week record of actual work hours for a specific quarter.

By fully expanding this view, it is possible to show the individual assignments where the work hours are reported. Within each assignment, the actual effort is tabulated in the progress history section of the assignment document.

When the Time Sheet system is used, the Time summary views provide tabulation of both project work and time allocated to overhead categories. The overhead subtotal line for each project or person is identified with the heading "OH". When the OH line is expanded, the details show as Time Sheet documents in the preview pane.