T3 – The use of MobilePM in the team or for team steering

Now we are going to increase the complexity: You are now in the role of a project manager or person responsible for a topic, and should manage 2 employees. For this purpose, we will use the project already created in Tutorial 1 and expand this by 2 employees to whom you wish to allocate tasks and roles to within the project.

1. Firstly, we add 2 contacts from the Address book as new employees: Call up the item Administration in the main menu and then "Import Address Book". Subsequently, you can select the employees' contacts and issue each of them with an individual password.

2. Now the new employees must be allocated to the current contract: This occurs in the main menu under "Contracts". Open the contract there and select the point "Positions". Here you can now select the service that is to be provided by the respective employee. The employee can be selected under the item "Staffing" and saved using "Save".

3. Since the employees should be deployed for our existing project, they must also be allocated to it: For this purpose, please call up the project from the main menu and select the item "Staffing". Here you can again select the employees involved, and if necessary, define their responsibilities in this project. The allocations are saved using "Save".

4. Next, we wish to allocate tasks to our new employees within the project. There are several possibilities for this within MobilePM, however, for reasons of improved clarity, we recommend using the route via the WBS browser:

   For this purpose, open the item "Work Breakdown Structure" in the project details using . Here you obtain the current project structure (Phase1, Phase 2, Phase 3 and the corresponding tasks under each of these) displayed in the form of a tree. As usual, the respective structure level can be opened or closed via and .

5. Now open the task to be allocated and there open the "Performer" entry. Subsequently, select the individual employee, define the responsibility for them if necessary, and save this responsibility using "Save".

6. The employee concerned should now receive a budget (in terms of working days) for the completion of this task. For this purpose, call up the "Performer" entry again and

open the details using ⓘ behind the desired employee. Here you can enter the desired values in days into the field "Budget". Subsequently, the settings are saved using "Save".

You have now added new employees to the project and allocated them with a respective individual budget for completion. Subsequently, the corresponding operational or action plans must be set up for each new project employee. They are the basis for the following project management tasks:

- Checking whether the intended plan is feasible regarding available capacity, i.e. manpower.
- Evaluating whether the workload of the individual employees is appropriate.

Please refer to Tutorial 5 - Action planning incl. vacation and public holidays, for the individual steps on how to create an action plan (operational plan).

(The tutorial was created by Oliver Knappe in cooperation with MobileLifeDesign)