

FAQ - How can I enable a user to assign people to projects?

Question

How can I enable a user to assign people to projects?

Solution

1. Give the user the Resource Assigner role.
2. Specify which projects and which people the user has access to assign.

Note that there are three types of Organization Access for some roles such as Resource Assigner: Person, Project, and Owning.

- *Person* relates to the Organization of a person profile.
- *Project* relates to the Project Organization of a project profile.
- *Owning* relates to the Owning Organization of a project profile.

Take the example of a Project Manager who also has resource assigning permissions in his company.

Access to assign PROJECTS

Person Organization Access

- a. The Project Manager can assign to any project or only to certain Customers/Orgs:
 - i. Navigate to the person's **Person Profile > Organization Access (left menu) > edit pencil for Resource Assigner - Project**.
 - ii. If the Project Manager can assign to any project, choose **All**. Click **Save**.
 - iii. If the Project Manager can assign only to certain customers, edit the Resource Assigner row for **Project**, choose **Selected**, and check the boxes next to the Customers/Orgs to which he can assign. Click **Save**.
 - iv. If the Project Manager can assign only to certain internal owning organizations, edit the Resource Assigner row for **Owning**, choose **Selected**, and check the boxes next to the internal Owning Organizations to which he can assign. Click **Save**.

People – Organization Access for Betty BusDev (bbusdev)

ORGANIZATION ACCESS FOR THE RESOURCE ASSIGNER ROLE

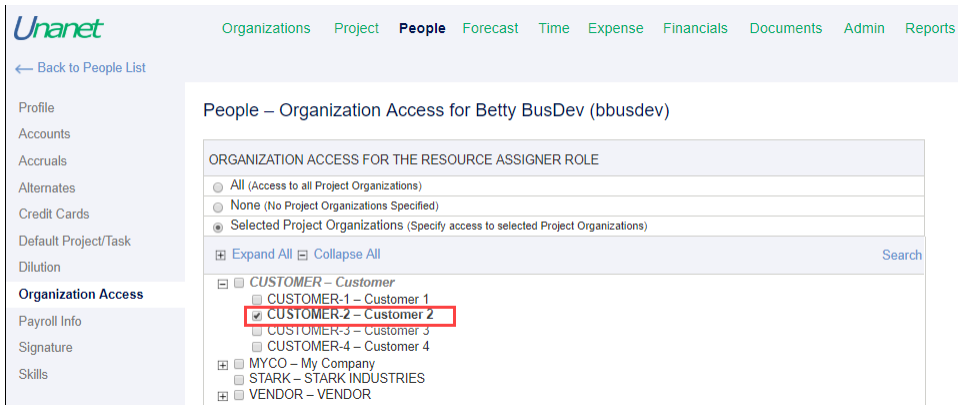
All (Access to all Person Organizations)

None (No Person Organizations Specified)

Selected Person Organizations (Specify access to selected Person Organizations)

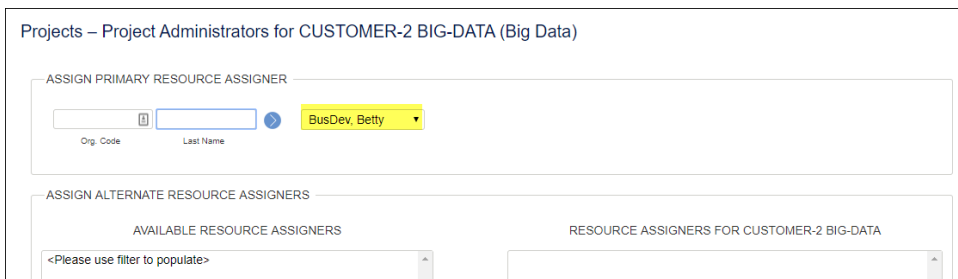
Save Back

- b. In the example below, the Project Manager can assign to any customer under Project Organization **Customer-2**.



Project Administrator

- a. If the Project Manager can assign only to *some* projects *within* certain customers, and *not all* projects for a customer:
 - i. For a specific project, navigate to **Project Profile > Administrators (left menu) > Resource Assigner**.
 - ii. Assign the person as the Resource Assigner for that specific project.
- b. In the example below, the Project Manager can only assign to the BIG-DATA project for Customer-2, and cannot assign to any other projects under Customer-2 unless specified.



Access to assign PEOPLE

Person Organization Access

- a. Access to assign/plan people must be granted by Organization.
 - i. Navigate to the person's **Person Profile > Organization Access (left menu) > edit pencil for Resource Assigner - Person**.
 - ii. If the Project Manager can assign any person, choose **All**.
 - iii. If the Project Manager can assign only certain people, choose **Selected** and check the boxes next to the Person Orgs he can assign.



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Profile
Accounts
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Dilution
Organization Access
Payroll Info
Signature
Skills

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ORGANIZATION ACCESS FOR THE RESOURCE ASSIGNER ROLE

All (Access to all Project Organizations)
 None (No Project Organizations Specified)
 Selected Project Organizations (Specify access to selected Project Organizations)

Expand All Collapse All Search

- CUSTOMER – Customer
 - CUSTOMER-1 – Customer 1
 - CUSTOMER-2 – Customer 2
 - CUSTOMER-3 – Customer 3
 - CUSTOMER-4 – Customer 4
- MYCO – My Company
 - STARK – STARK INDUSTRIES
- VENDOR – VENDOR

Additional Information

[Help Docs - People Organization Access](#)