Five ways of assigning users

By assigning a user to a project you allow the user to book hours on the project. Limitations can be applied on the assignment, such as start and end date, maximum hours in two variations. Each assignment also has two optional properties, namely role and rate. The rate is used to calculate the turnover and with the role you can designate someone's role within the project.

You can assign the same user to the same project multiple times, distinguishing each by a different role and/or rate. That's also why role and rate are shown on the various reports.

There are five ways of assigning users to projects:

1 Assign user to single project

The most straight forward way of assigning a user to a single project is by going to Manage -> Assignments. Select the user on the left and in the "new assignment" tab, select a project and click "save".

This will create a single assignment from the user on the selected project.

2 Assign user to multiple projects

In Manage -> Assignments you can also assign a user to multiple projects at once. Do the same as assigning a user to a single project but instead of one, select multiple projects in the dropdown. This will create a single assignment per selected project with the specified properties.

In the case shown in the image on the left this will assign the user to 3 projects, Galileo, Gemini and Glory. The user will be teamlead with a rate of 95 euros on each project and is allowed to book 320 hours on each project. The latter is important to understand, the created assignments will not share the allotted time but the allotted time counts individually per project.

3 Make a project a default project

In the project admin (Manage -> Projects) a project can be marked as a default project. All users will be assigned to a default project, making it the perfect solution for "holiday" or "sick leave" registration.

The assignments that are created do no have a start or end date, nor max amount of hours or any role or rate.

All current users and any future users will be assigned.

4 Assign multiple users to a single project

In the project admin (Manage -> Projects) you can also (un)assign users. Select an existing project, below the edit project panel there's a panel with Project assignments. This panel lists the currently assigned users to this project and also a "new assignments" button.

The "new assignments" panel is split it up in two lists, the list on the left with "All users" is the list of all available active users in eHour. From this list you can select multiple users, the selected users are listed on the right below the "Users to assign" title. To deselect a user, click on the name in the "Users to assign" section.

Select the users you want to assign, fill out the form and click "save". An individual assignment will be created per user with the properties specified in the form. Have a look at the image on the right of this text, for this selection 4 users will be assigned and each user is allowed to book 300 hours.

5 PM can assign users to his project

Project Managers can assign users to the projects they are project manager for. This feature should first be enabled, go to System -> Configure eHour and set Projectmanager privileges to "Full control". When it's set to full control, the project manager has the same option as described above under "4 Assign multiple users to a single project" but in the "project mgmt" section.

It's also possible to completely disable this feature, set the privilege to None or to only allow a PM to modify existing assignments or unassign someone from his/her project.