

HOMework

CLASS 11

CREATING PROJECT
STAFFING PLANS



WORKLOAD PLANNING IN TEAMGANTT

We can't say it enough: Practice makes perfect! And that's just what this homework assignment is meant to do.

Before you start assigning people to work in TeamGantt, we suggest taking a couple of spins estimating tasks and creating plans, just so you get comfortable with the fundamentals of what's needed to understand and execute a great staffing plan. If you're ready to jump straight into TeamGantt, go for it!

THE ASSIGNMENT

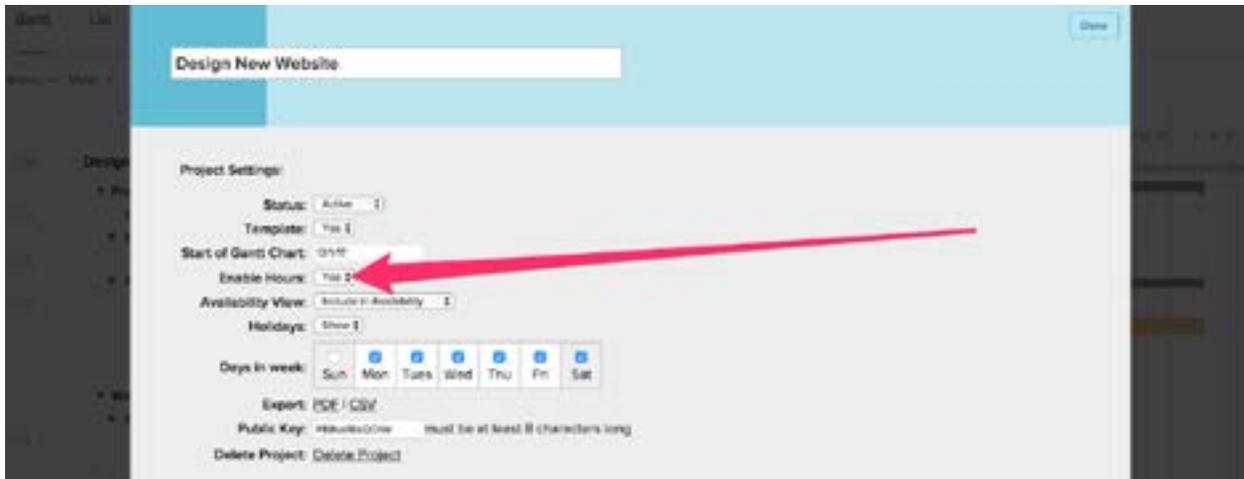
This assignment actually picks up right where **Class 03 - Estimating Projects with Ease** left off. If you haven't completed *Homework 2: Estimating Projects in TeamGantt* from Class 03 yet, that's okay! We included the assignment below to make it easy for you to catch up.

Already checked the project estimation homework off your list? Feel free to skip ahead to *Step 2: Assigning tasks*.

STEP 1: ESTIMATING PROJECTS IN TEAMGANTT

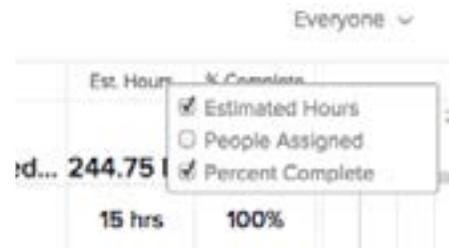
Just a quick reminder: You'll need a TeamGantt account to complete this homework assignment. Don't have one? Sign up for free at teamgantt.com/signup!

1. Start by logging into TeamGantt and creating a new project. (We suggest adding a practice project for this assignment. Don't worry: You can always delete it later.)
2. Make sure *Estimated Hours* is enabled on your project. You can do this by going to *Menu > Project Settings > Enable Hours* and selecting *Yes*:



3. Add your tasks! For the purpose of this assignment, keep it simple and relatable. For example, map out the tasks for making dinner, planning a vacation or team outing, or something a little less complex than the usual rocket science you do on a day-to-day basis. The idea here is to start easy to get the hang of it so when you do have to plan that next rocket launch, you'll be ready to rock it. (Yes, we did.)

4. Once all of your tasks are in, start adding hourly estimates to your tasks. If you don't see the *Estimated Hours* column in your list or gantt view, simply click on the columns at the top of the gantt chart, and make sure *Estimated Hours* is checked. Or, enable the *Estimated Hours* column from *View > Estimated Hours*.



To assign hours to a task, simply click into the text field in the *Estimated Hours* column and enter your estimate:



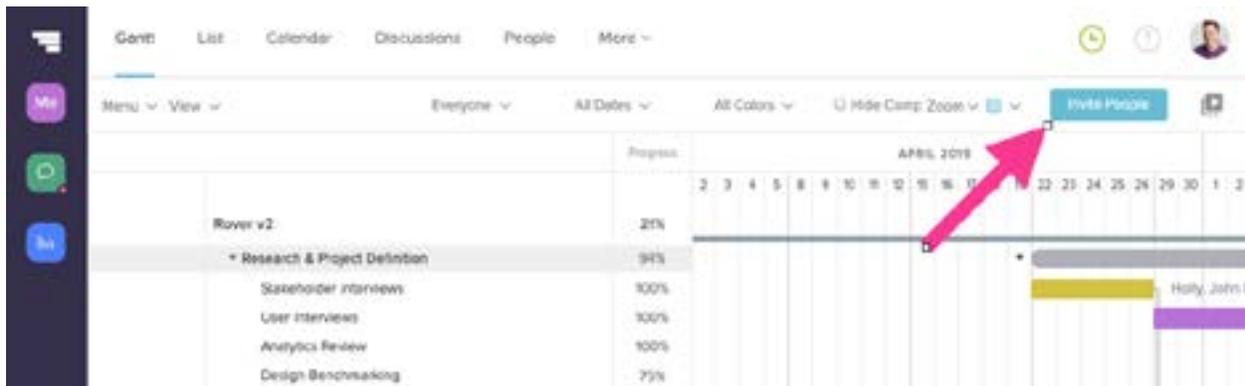
As soon as your estimates are in, you'll be able to see how much time each group of tasks will take, as well as your total project.

Research & Project Definition	30 hrs
Stakeholder interviews	15
User Interviews	15

STEP 2: ASSIGNING TASKS

Now that you've got the hang of estimating tasks in TeamGantt, you're ready to make assignments. Let's say you're working on a project with 3 other folks. You'll want to add them to your project so you can assign them to the tasks you've already estimated.

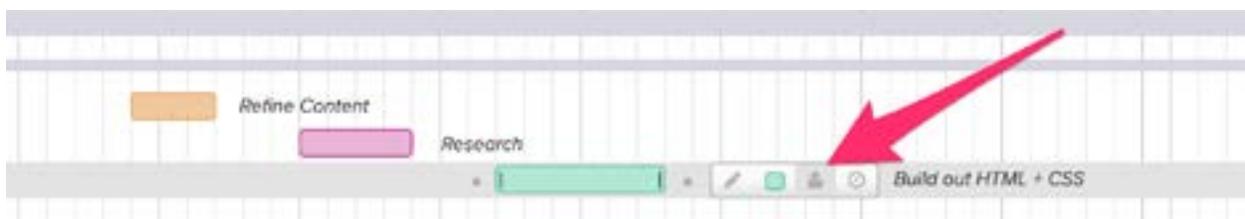
To add people to your plan, click *Invite People*, and follow the flow to invite your team into your plan. (Note: If you're not ready to send invitations quite yet, feel free to set people up as "Other Resources" for now so no one gets notified about task assignments.)



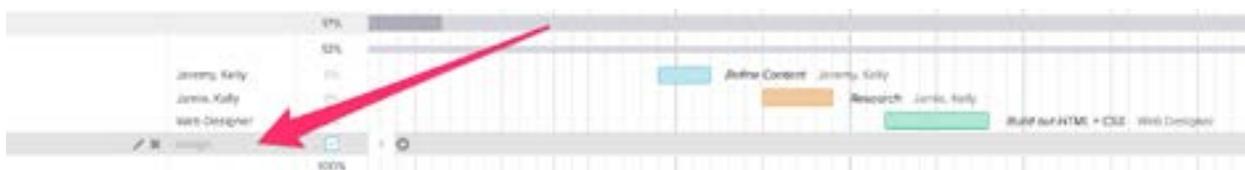
There's a lot you can do when adding people in TeamGantt, such as setting account- and project-level permissions. To learn more, [check out this help doc](#).

Once you've got your team set up, go back to the *Gantt* tab, and click on the first task you'd like to assign to a team member:

Method 1: Click the person icon to the right of any taskbar to select a user or resource to assign the task to. (Hover your mouse over that row to see the icon appear.)



Method 2: From the *Assigned* column, click *assign* to select a user or resource to assign the task to.

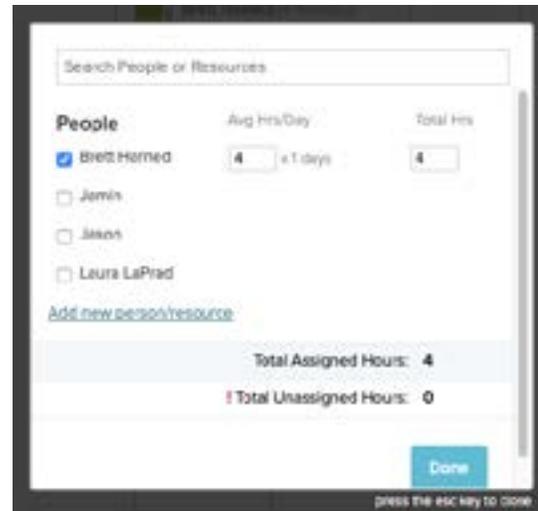


Both methods will display a drop-down menu that features the names of the people and resources available to work on that task. Choose the person or resource you want to assign from the drop-down. Then, include the estimated amount of time needed, and click *Done*.

After assigning tasks to people, you can use the *Everyone* filter to see only the tasks that are assigned to a particular person.

Another note: When building out your project, you'll likely need to assign multiple tasks to the same user or resource, and it's easy to do.

[This help doc shows you how.](#)



STEP 3: MANAGING WORKLOADS

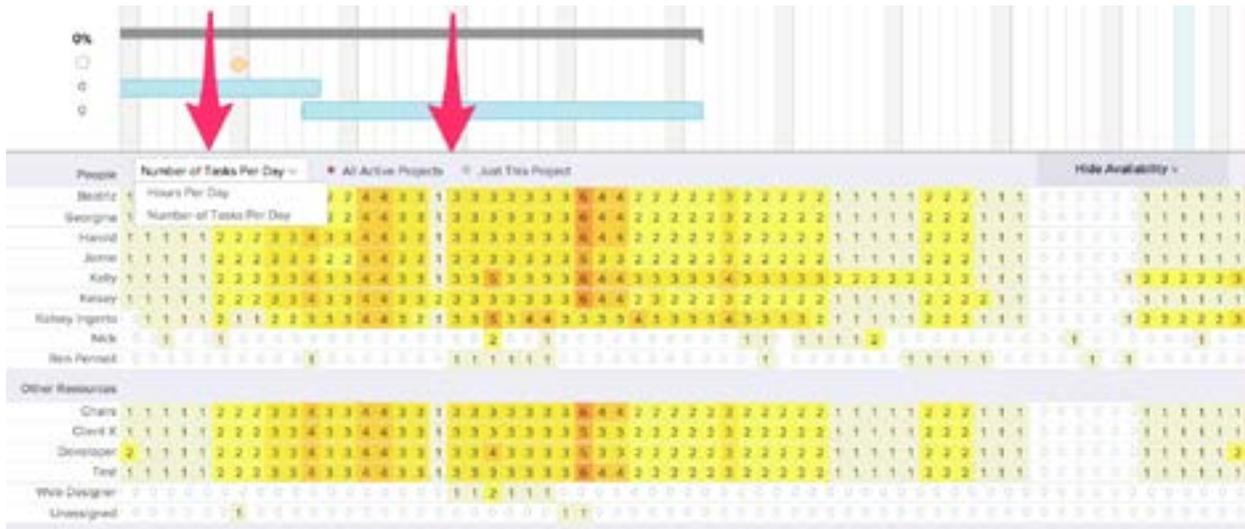
In TeamGantt, you can easily view how many tasks (or hours, if your account is on our Advanced plan) a person or resource is assigned to on any given day. Simply click the *View Availability* tab in the bottom right of the gantt chart.



The *View Availability* window will expand, showing you all users and resources that have currently been [invited to the project](#). Each colored cell represents a calendar day, and the number within the cell is the number of tasks (or hours) assigned to the user or resource on that day. As a user or resource gets busier, the cell will get darker. Think of it like your very own workload heat map!

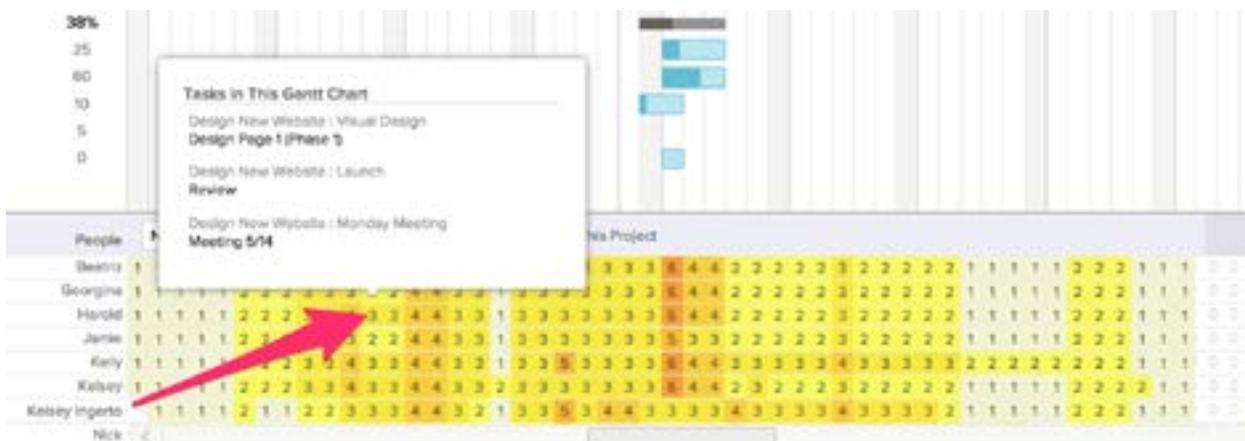
You can choose to view:

- The number of tasks or estimated hours assigned to a user or resource on any given day
- Task assignments in the current project only or across all active projects



Now that you've got the hang of it, go ahead and create a second (or maybe even your third, fourth, and fifth) project in TeamGantt, add tasks and assignments with estimated hours, and watch the *Availability* tab fill up.

As you review the planned time, make sure you're looking at *All Active Projects* and noting conflicts. When you see a conflict, click on the cell to view all tasks/time allotted to that person.



This is the project management gold you're looking for! Finding conflicts now enables you to work together to prioritize tasks and revise timelines in advance so you can avoid overwhelming a teammate and potentially missing a deadline.

- Update availability in real time! Simply drag and drop an assigned task to a new date in the gantt chart to see how it affects your team's availability.
- See a *Private* task on a team member's workload? That just means it's part of a project you're not invited to. Check with your teammate to see if it truly affects their workload.

Show your work!



We'd love to see your projects and estimates—and so would your fellow classmates! Feel free to take a screenshot of your estimate and share it in the class comments!

Want more help creating estimates in TeamGantt? Check out our helpful support video: <https://support.teamgantt.com/article/79-hourly-estimation/>