Resources / People

In order to assign work, you need users with the right skills. Information about user expertise is managed under **People** and can be used as automatic assignment criteria.

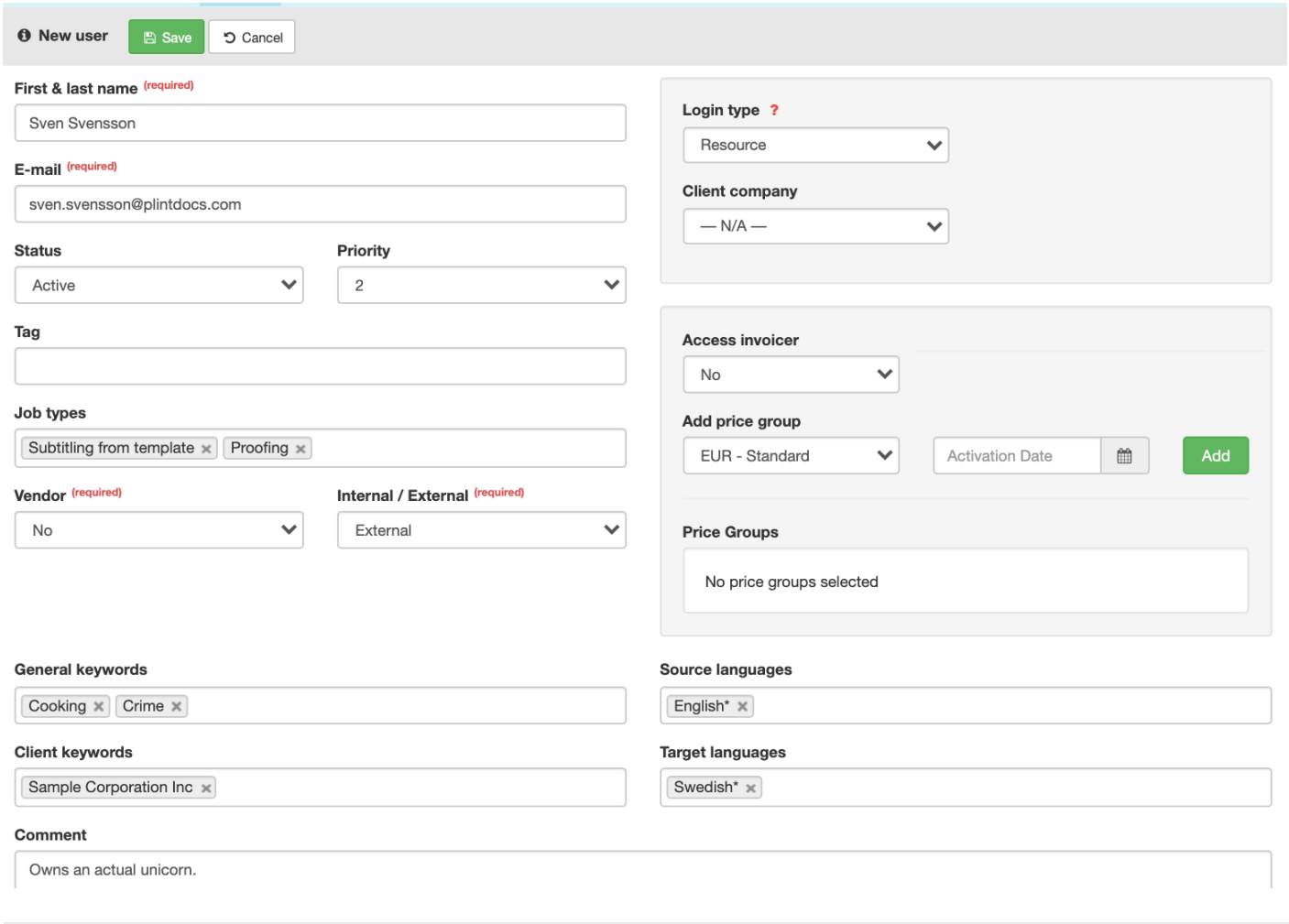
The most common login type in Plint is typically a **Resource**, as in the example below. These are the users who perform individual jobs without needing access to the complete project. In short, they only see what is relevant to complete a certain *job*. However, *Client*, *Manager* and *Workbench* users can also be assigned jobs based on the same properties and data.

The People edit forms

Like Projects, People can be created or edited using one of two forms. The simple form shown below is often sufficient, and includes:

- *Name* and contact information
- *Email* (also used as login name)
- *Status*
  - Setting this to *Inactive* will prevent the user from logging in, automatically getting assigned jobs or receiving any system emails
- *Priority* is a simple switch used to prioritize users when multiple ones are eligible for a job.
  - The lower the number, the higher up in the list the user gets
  - It can also be used as basic criteria: i.e. only users with a certain Priority level are eligible.
- *Job types*
  - Any job type from *Tools & Data / Job types* can be selected for any user
  - These are commonly used as assignment criteria for jobs
- *Vendor / Internal/External*
  - These options do *not* change system behaviour but can be used to categorize users
- *General keywords*, such as genres and areas of interest can be used as assignment criteria for jobs
- The same goes for for *Client keywords*, which are typically used to specify that a resource is well versed in the terminology and requirements of a specific client.
  - Please note that this is different from *Client company*
  - Client company should only be specified if the Resource is dedicated for work for that company, as explained here
- *Source* and *Target languages* are also commonly used as assignment criteria
- Invoicing options are used to help calculate job fees in a relevant currency

Note that the **jobs** determine which requirements are relevant. Sometimes, only the right *Job type* is needed to be eligible for a job. This means that there is no risk of adding "too much information" about the users themselves. On the contrary.



Revision #8
Created 2021-02-04 16:39:34 UTC by Plint
Updated 2021-02-04 17:33:34 UTC by Plint