Overview

This Job Aid defines the steps to follow when requesting work resources to be allocated to projects in the platform.

Work resources have defined availability and may have their time scheduled by a line manager. At this point in the project planning process, the project manager submits a request for resources to support the approved project. The request is then routed to the appropriate line managers for review and approval. Depending on your organisational rules, project managers are typically required to have resource commitments in their projects approved by the line managers before the execution of work.

This process allows your organisation's line managers and project managers to negotiate and record an "agreement" to make sure that work resources are being utilised appropriately and effectively.

There are two (2) ways to request resources for an approved project in the platform:

1. **Submit a request for generic resources** (*when the resource roles and the demand for their time for a specific duration of the project is known*).

2. **Submit a request for named resources** (*when it is known which named resources are required to support the project and the demand for their time for a specific duration is known)*

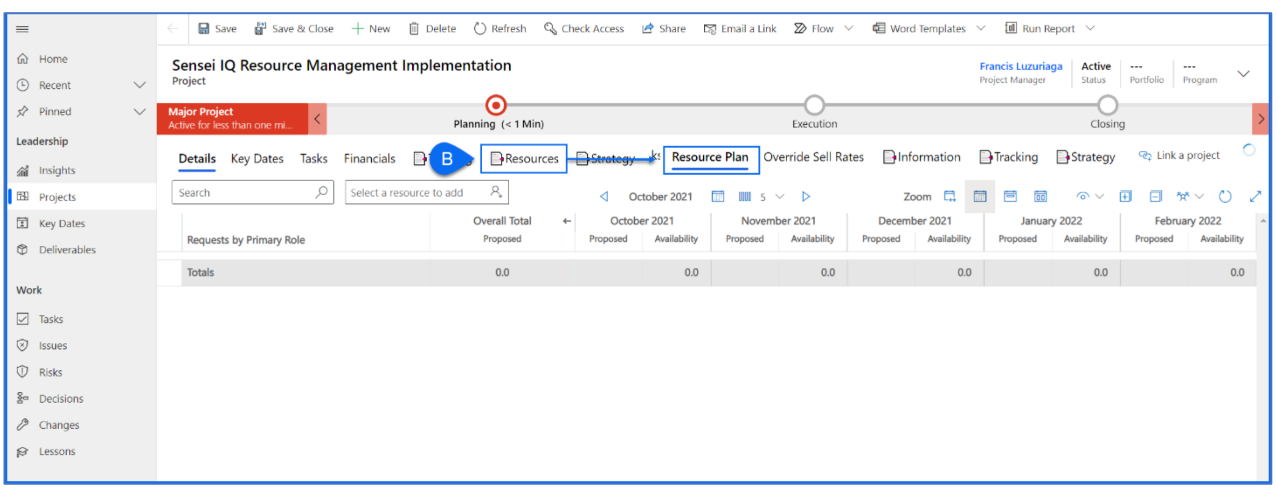
Submit a request for generic resources

Project Manager — Projects - Resource Plan

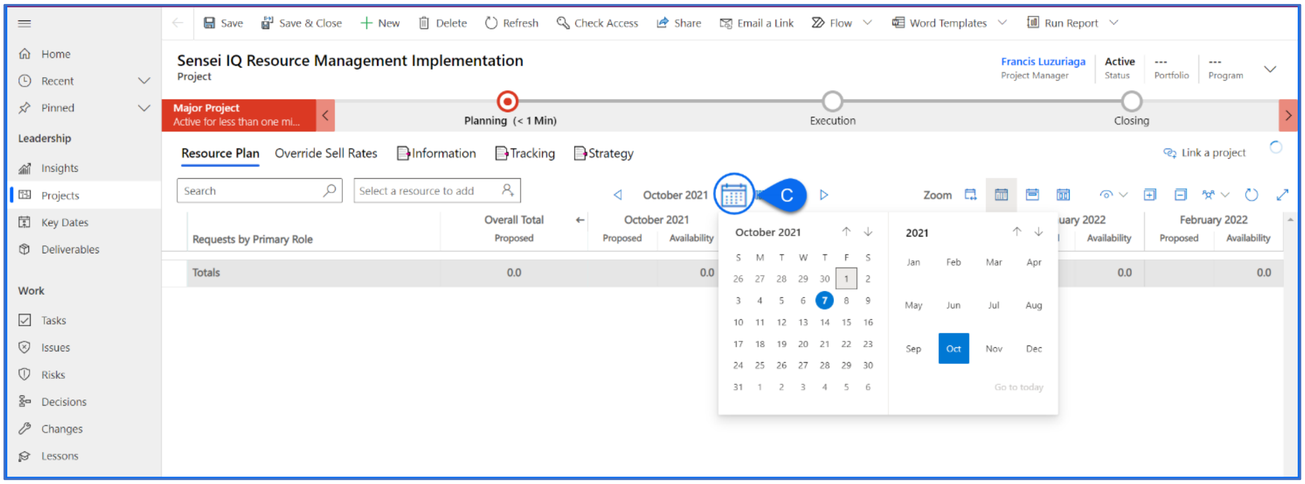
1. SET THE RESOURCE DEMAND HORIZON

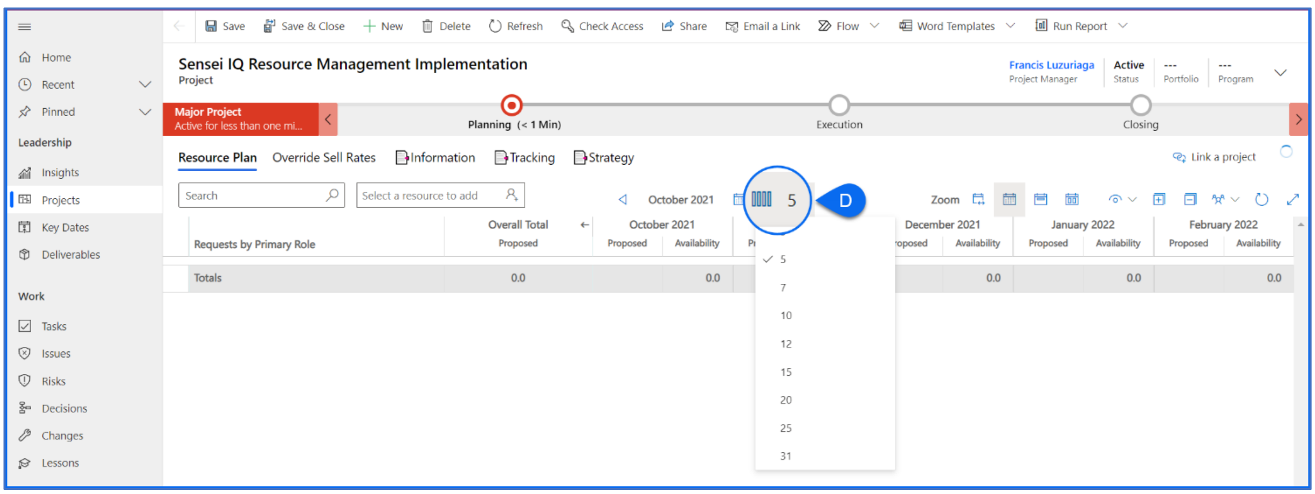
a. Ensure you are in the **Project** area and click **Projects** in the **Leadership** section.

b. Open the project record then expand the **Resource** segment and navigate to the **Resource Plan** tab.



c. Change the selected **date** for the first period that you require the generic resources from.

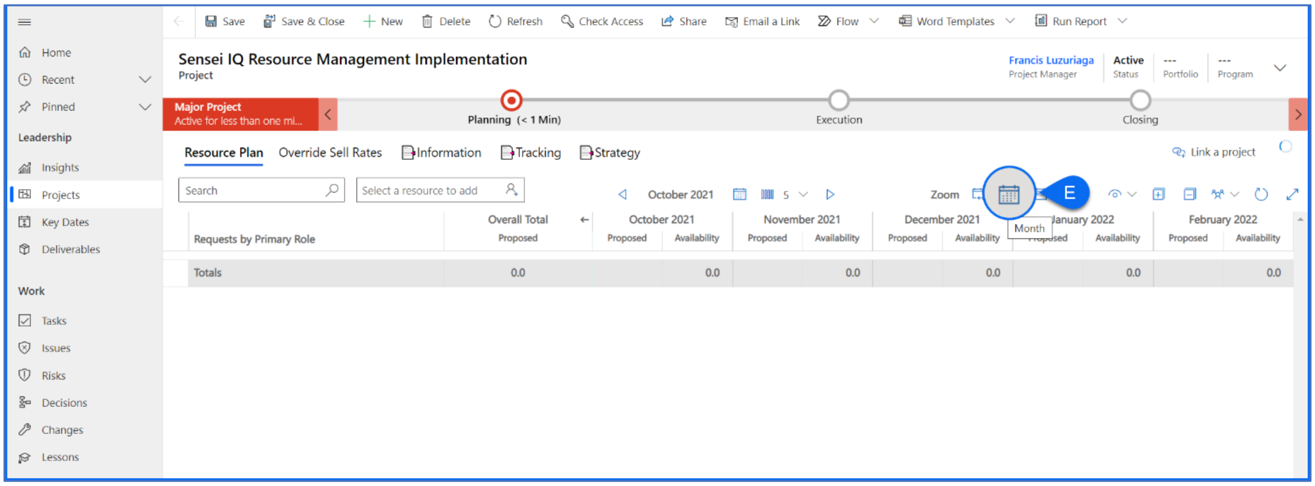




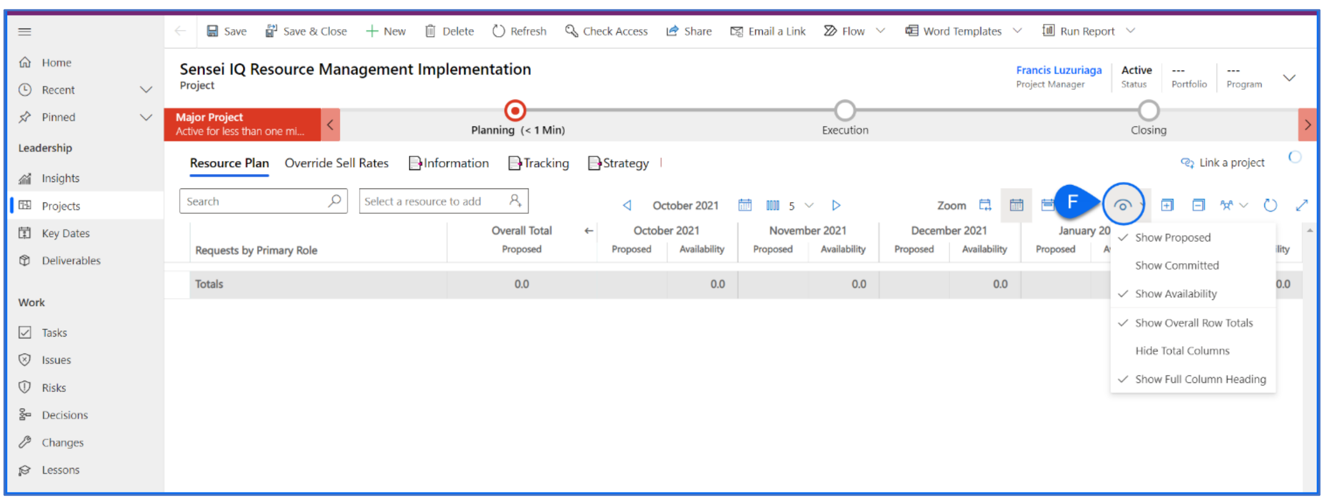
d. Set the number of **periods** you want to be visible on the page.

Important: Proposed hours recorded in all visible periods displayed on the page are submitted by default. Ensure that you apply the appropriate fixed value for the number of **periods** that you want to remain visible on the page before you click the **Submit** or **Submit and Save** button later. Otherwise, you have the option to **Submit all periods and Save** to include the proposed hours that are **not** in the visible periods.

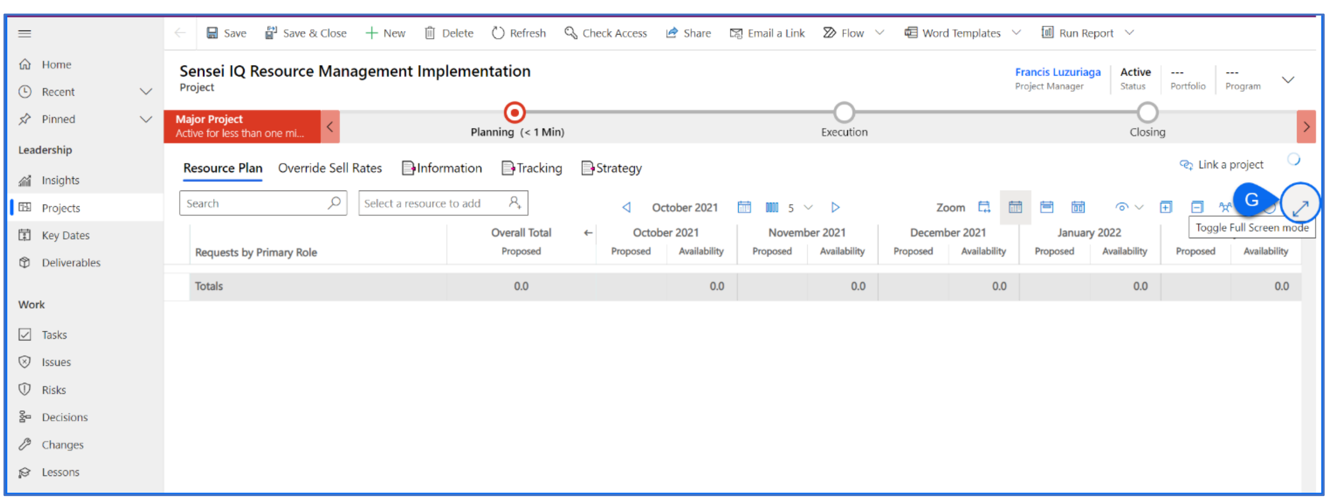
e. Set the **timescale** of the requested period using the **Zoom** feature.



f. Select the **Show Proposed**, **Show Availability**, **Show Overall Row Totals** and **Show Full Column Heading** options from the **View Options** menu.

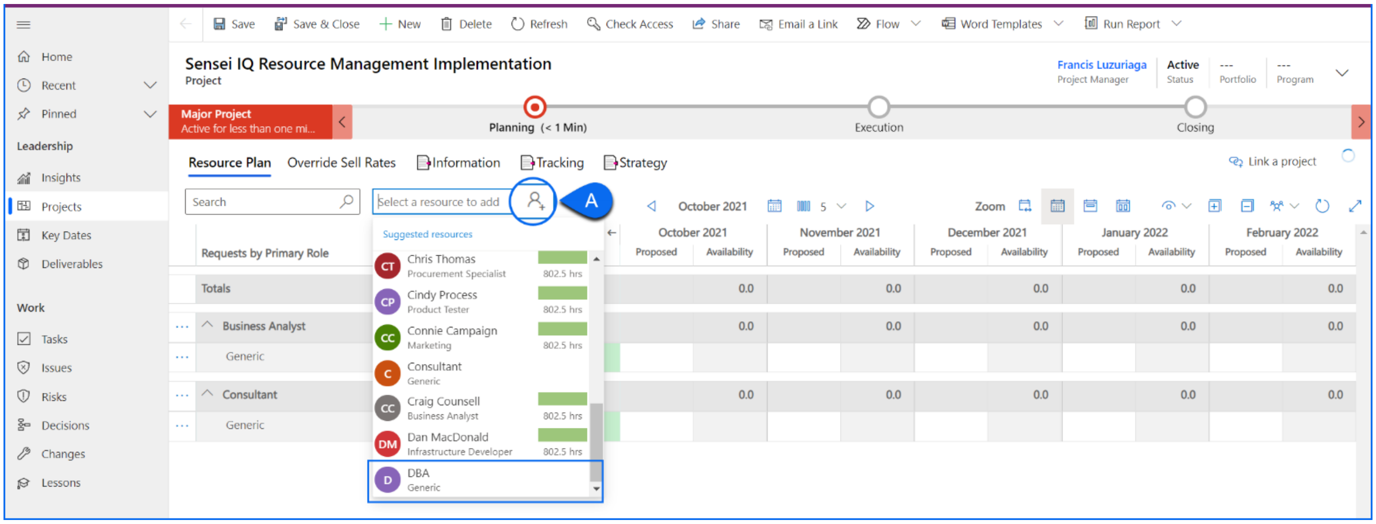


g. Enable the **Toggle Full Screen Mode** option to switch the **Resource Plan** screen to focus mode.

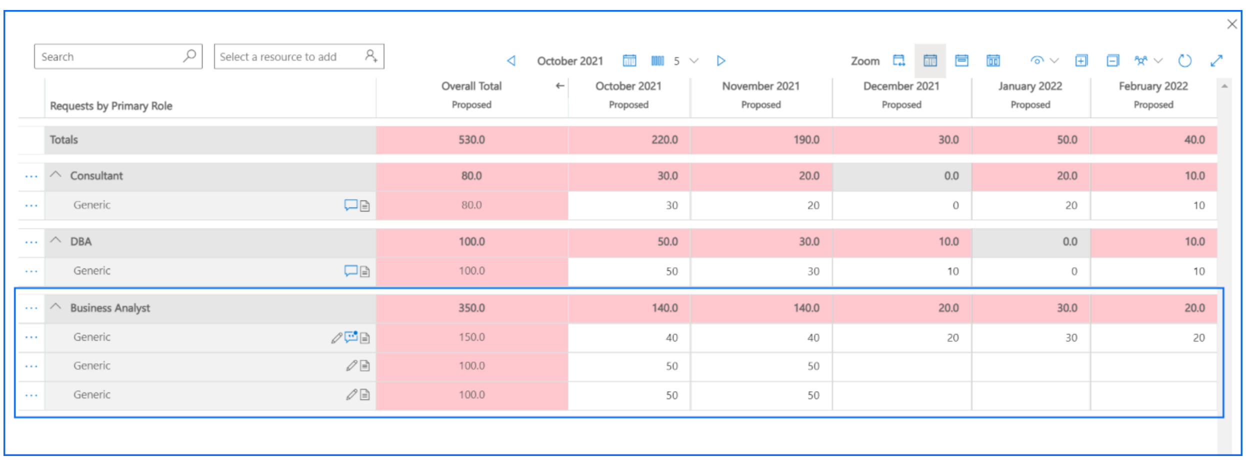


2. CREATE AND SUBMIT A REQUEST FOR GENERIC RESOURCES

a. Click the **Add Resource to Plan** button to search and select the generic resource roles to add to your project individually.

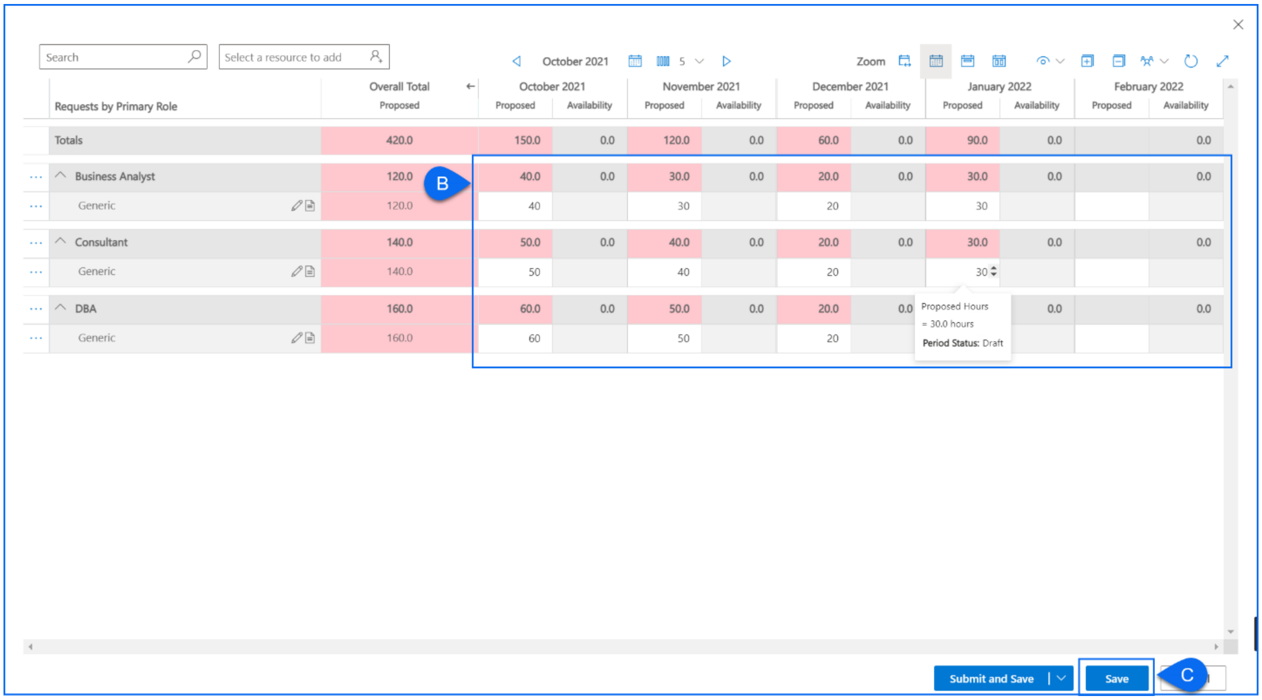


Pro Tip: If you need to request <u>two or more resources of the same generic resource role</u> for your project, repeat this step until you have created multiple generic rows under the same primary role row. You should use this method so that the line manager can replace each request for the same generic resource with a named resource individually.

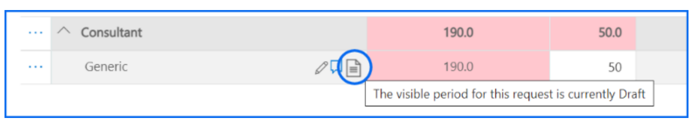


b. Once you have added all the generic resource roles required in your project, enter the required effort in hours in the **Proposed** columns across the visible periods.

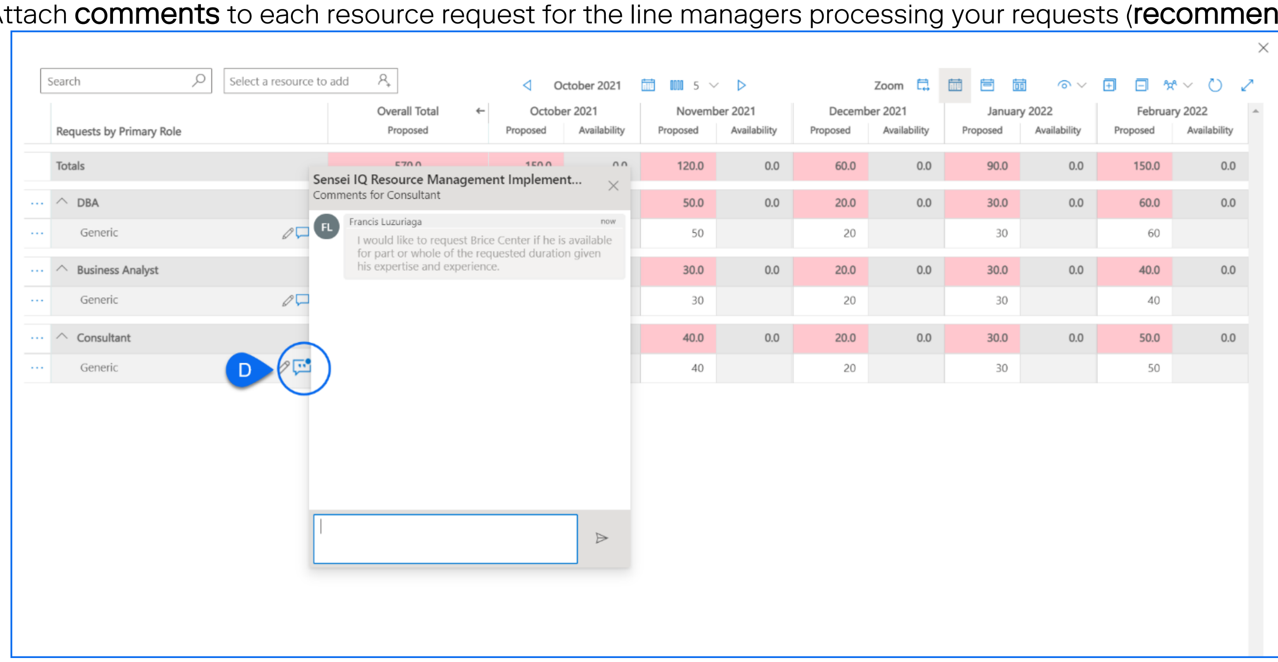
c. Click the **Save** button to save your changes if you want to modify and submit your resource requests later.



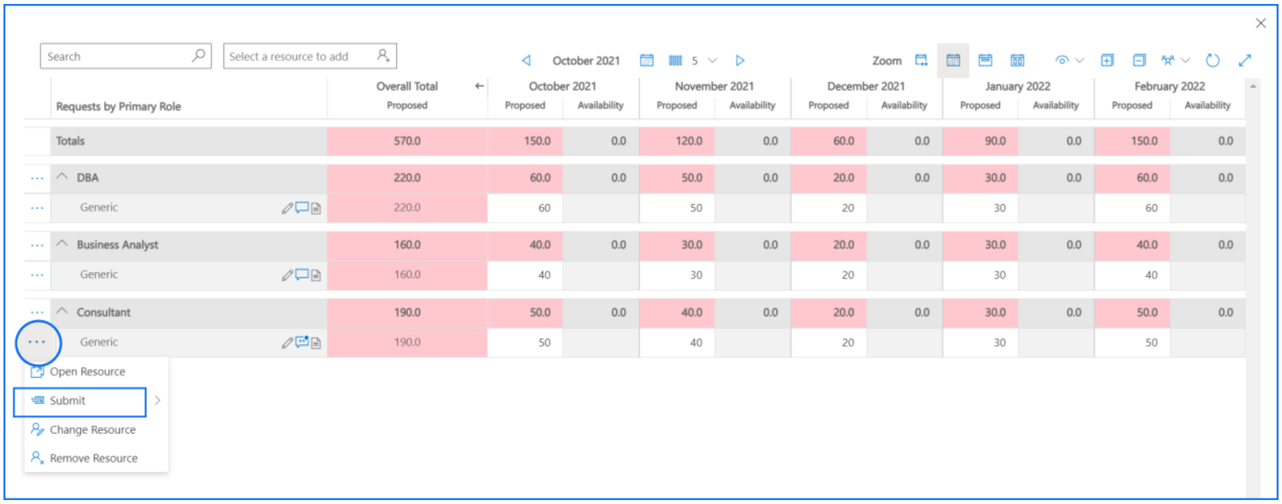
Important: At this point of the resource request process, the status of your proposed hours is displayed as Draft.



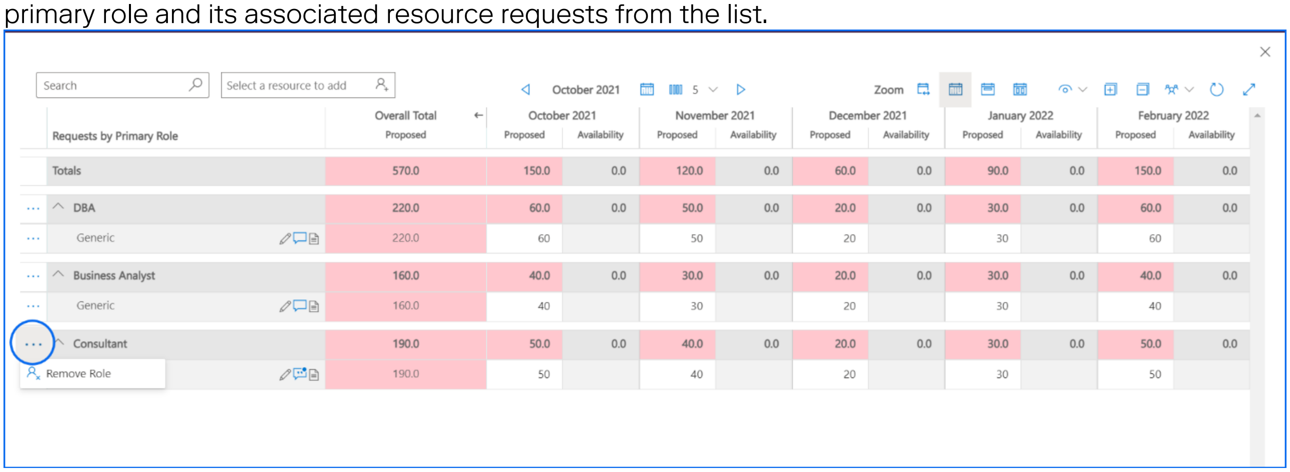
d. Attach **comments** to each resource request for the line managers processing your requests (**recommended**).



Tip: You can click the **Row Menu** button (**…**) in front of the generic resource role row to view more options including **Submit** that allows you to submit each resource request for the visible periods or **Remove Resource** to delete the resource request from the list individually.

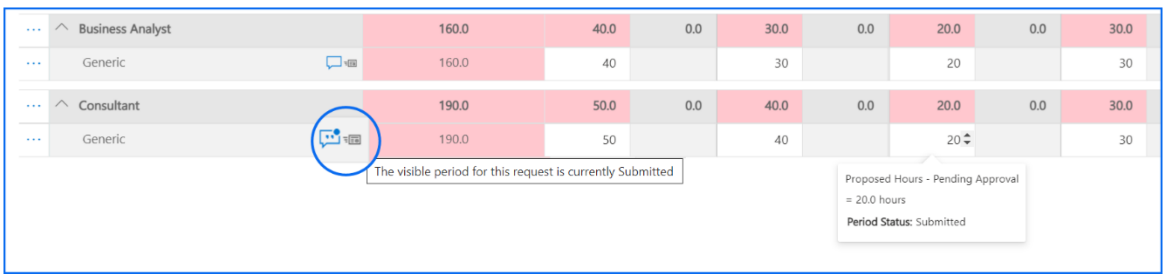


Tip: You can click the **Primary Role Menu** button (**…**) in front of the primary resource role name to remove the primary role and its associated resource requests from the list.



e. Once you have created the request for generic resource roles for the project, click the **Submit and Save** button to formally submit all your resource requests for the visible periods.

Tip: At this point of the resource request process, the status of your proposed hours (with attached comments) is displayed as **Submitted** and the cells they are contained in are highlighted in red denoting that the hours are not yet committed. The line managers can now review and process your resource requests from the **Resource Demand** dashboard in the platform.

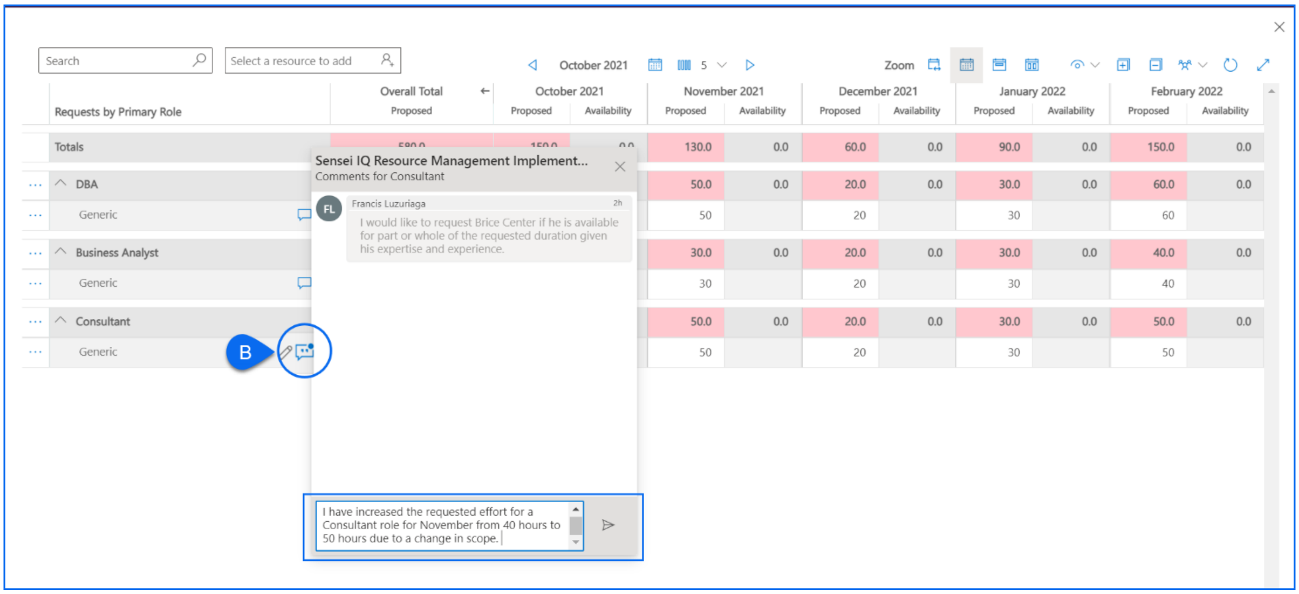


3. MODIFY A SUBMITTED REQUEST FOR GENERIC RESOURCES

a. From the Resource Plan tab, locate the generic resource role row you want to update and modify the proposed hours for the visible period in the Proposed column.

Tip: At this point of the resource request process, the status of your proposed hours for the modified resource request reverts to **Draft.**

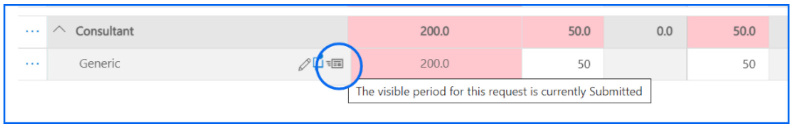
b. Attach **comments** to the modified resource request for the line managers processing your requests (recommended).



c. Click the **Row Menu** button (**...**) in front of the generic resource role row to view more options.

d. Click **Submit** to send the changes applied to the resource request for the visible periods.

Tip: At this point of the resource request process, the status of your proposed hours for the modified resource request changes to **Submitted.**



e. Finally, click the Save button to keep the changes to the resource request.

Submit a request for named resources

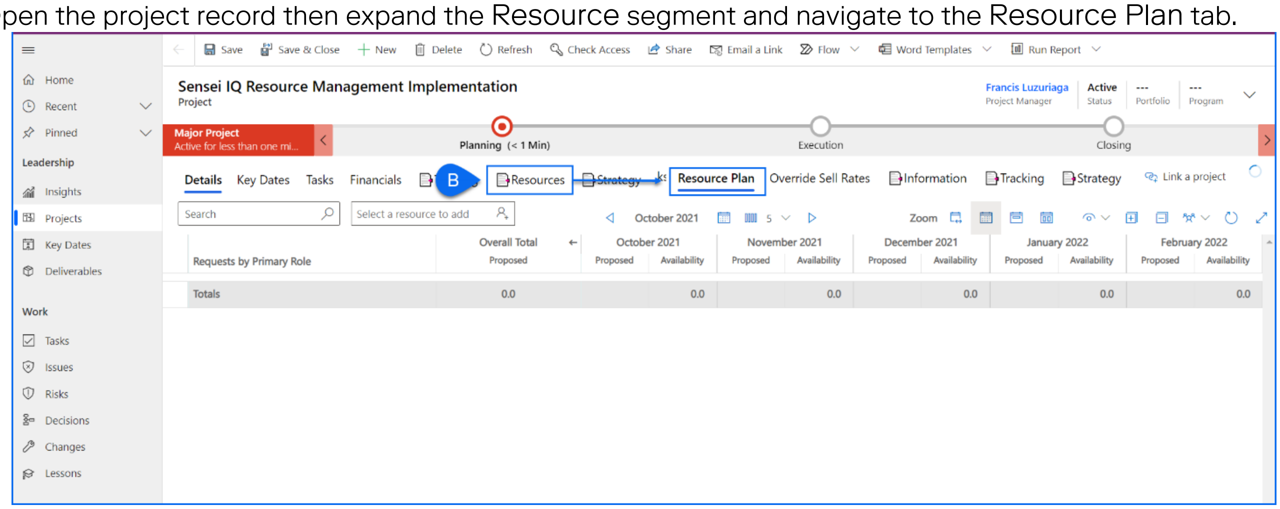
Project Manager

Projects - Resource Plan

1. SET THE RESOURCE DEMAND HORIZON

a. Ensure you are in the **Project** area and click **Projects** in the **Leadership** section.

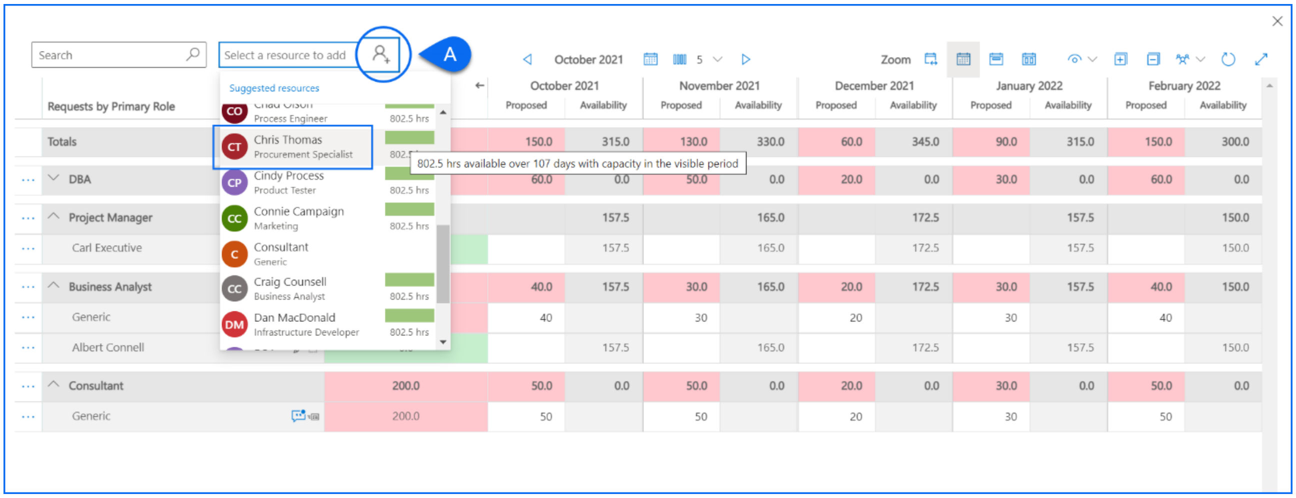
b. Open the project record then expand the Resource segment and navigate to the Resource Plan tab.



c. Follow the same steps described in the Submit a request for generic resources section above.

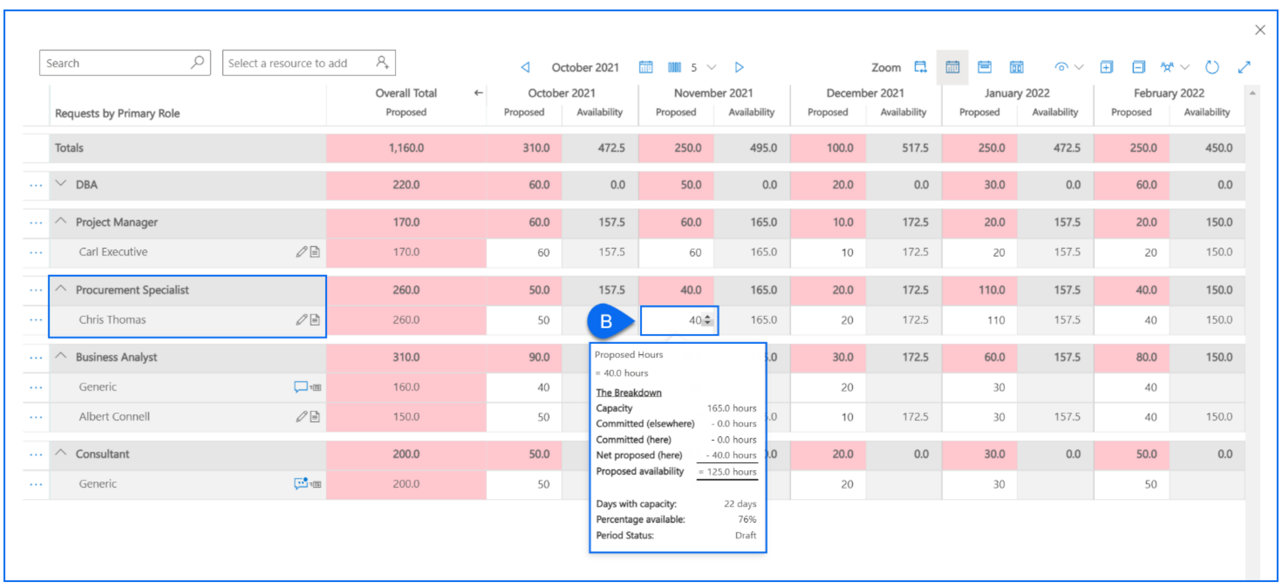
2. CREATE AND SUBMIT A REQUEST FOR NAMED RESOURCES

a. Click the **Add Resource to Plan** button to search and select the named resources to add to your project individually.

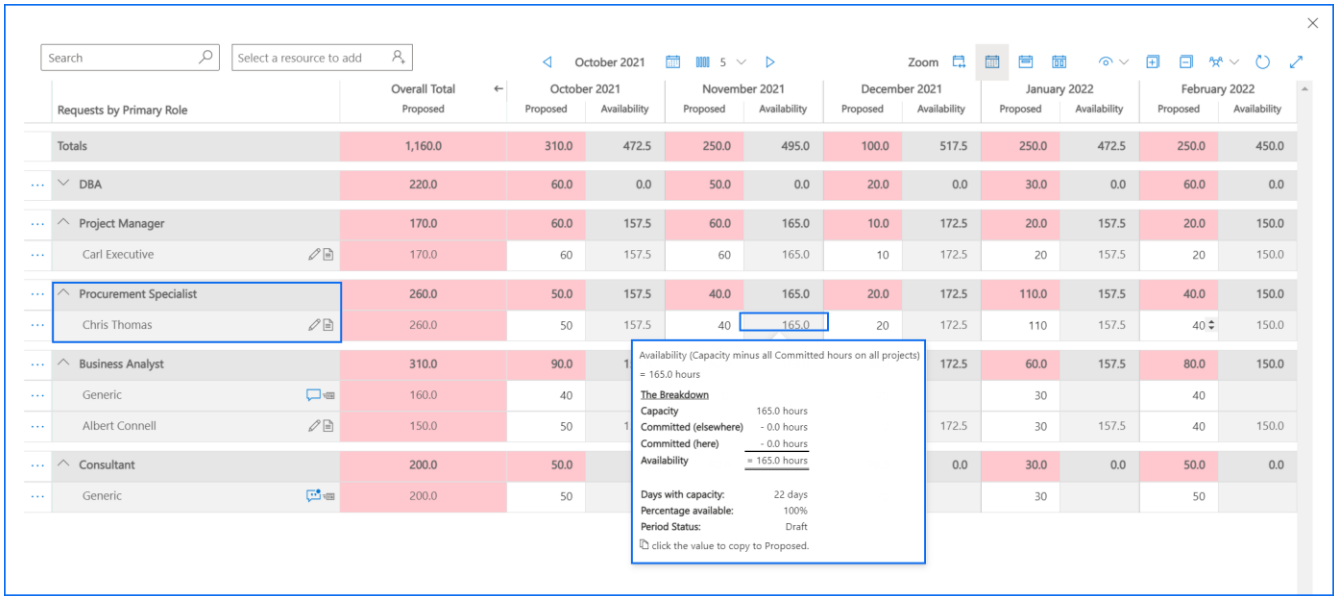


Tip: Each named resource is assigned a primary role in the platform. The **primary role**, **full name**, and **total available hours** of the named resources with their **capacity in the visible periods** are displayed in the live search results.

b. Once you have added all the named resources required in your project, enter the required effort in hours in the **Proposed** columns across the visible periods.



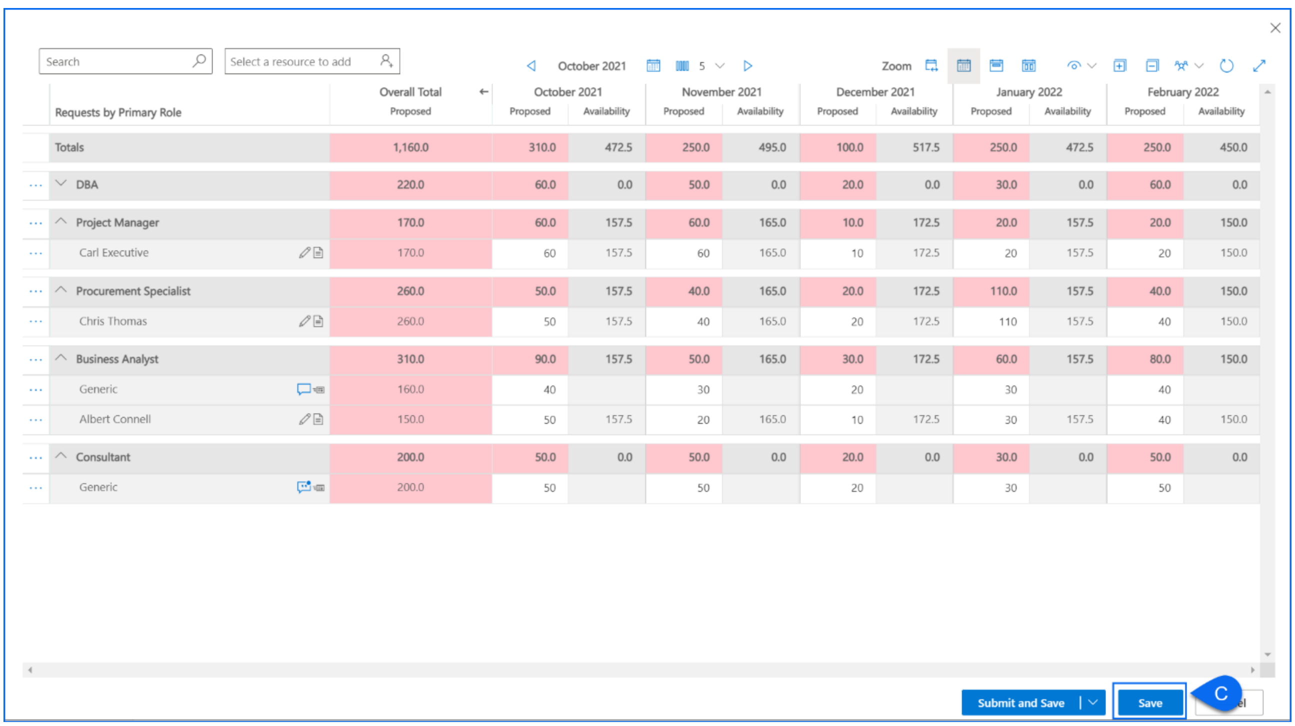
Tip: At this point of the resource request process, the page will display **Requests by Primary Role**, total capacity for each visible period in the **Availability** column, and **The Breakdown** of their capacity, committed hours (in the same project and other projects, if any), net proposed hours being requested in the project including the amount of days with capacity and percentage available for the visible period as a **tooltip text** when you hover the mouse over the **Proposed** column or **Availability** column.



Search | Select a resource to add | October 2021 | 5 | Zoom

Requests by Primary Role	Overall Total Proposed	October 2021 Proposed	October 2021 Availability	November 2021 Proposed	November 2021 Availability	December 2021 Proposed	December 2021 Availability	January 2022 Proposed	January 2022 Availability	February 2022 Proposed	February 2022 Availability
Totals	1,160.0	310.0	472.5	250.0	495.0	100.0	517.5	250.0	472.5	250.0	450.0
DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Project Manager	170.0	60.0	157.5	60.0	165.0	10.0	172.5	20.0	157.5	20.0	150.0
Carl Executive	170.0	60	157.5	60	165.0	10	172.5	20	157.5	20	150.0
Procurement Specialist	260.0	50.0	157.5	40.0	165.0	20.0	172.5	110.0	157.5	40.0	150.0
Chris Thomas	260.0	50	157.5	40	165.0	20	172.5	110	157.5	40	150.0
Business Analyst	310.0	90.0	1				172.5	60.0	157.5	80.0	150.0
Generic	160.0	40						30		40	
Albert Connell	150.0	50	1				172.5	30	157.5	40	150.0
Consultant	200.0	50.0					0.0	30.0	0.0	50.0	0.0
Generic	200.0	50						30		50	

c. Click the **Save** button to save your changes if you want to modify and submit your resource requests later.



Search | Select a resource to add | October 2021 | 5 | Zoom

Requests by Primary Role	Overall Total Proposed	October 2021 Proposed	October 2021 Availability	November 2021 Proposed	November 2021 Availability	December 2021 Proposed	December 2021 Availability	January 2022 Proposed	January 2022 Availability	February 2022 Proposed	February 2022 Availability
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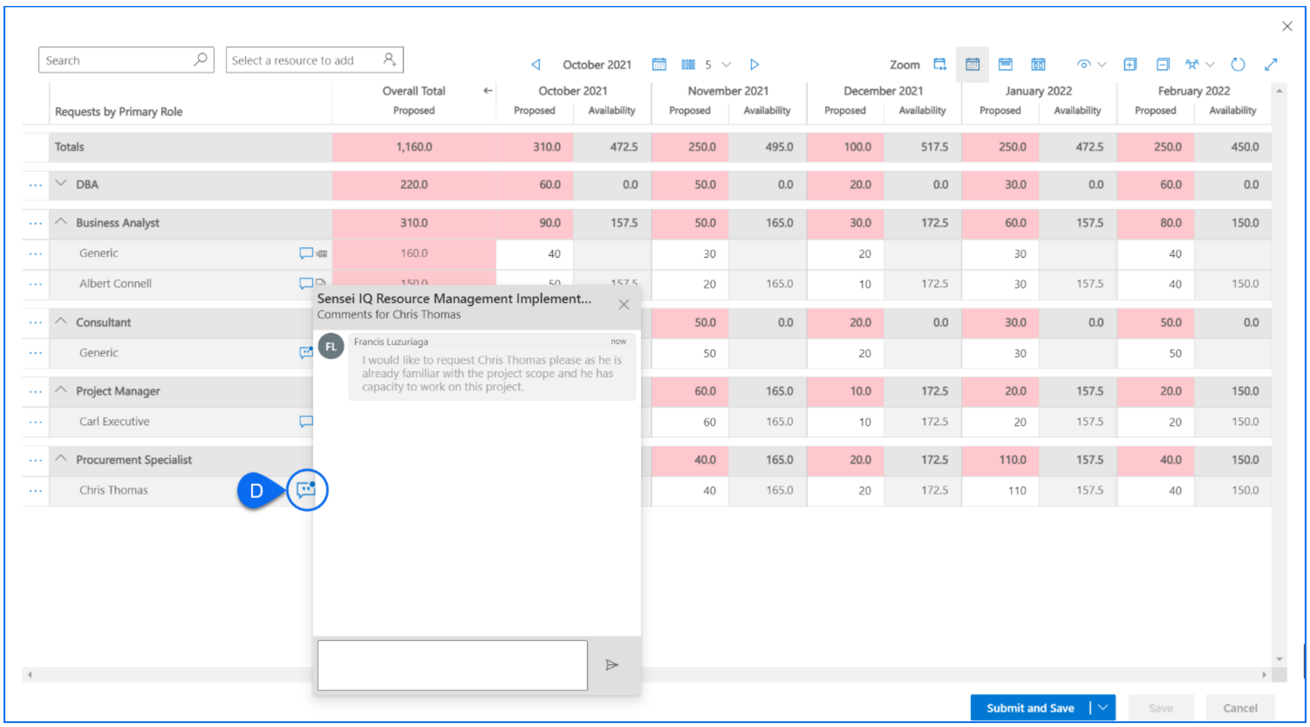
DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Project Manager	170.0	60.0	157.5	60.0	165.0	10.0	172.5	20.0	157.5	20.0	150.0
Carl Executive	170.0	60	157.5	60	165.0	10	172.5	20	157.5	20	150.0
Procurement Specialist	260.0	50.0	157.5	40.0	165.0	20.0	172.5	110.0	157.5	40.0	150.0
Chris Thomas	260.0	50	157.5	40	165.0	20	172.5	110	157.5	40	150.0
Business Analyst	310.0	90.0	157.5	50.0	165.0	30.0	172.5	60.0	157.5	80.0	150.0
Generic	160.0	40		30		20		30		40	
Albert Connell	150.0	50	157.5	20	165.0	10	172.5	30	157.5	40	150.0
Consultant	200.0	50.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0
Generic	200.0	50		50		20		30		50	

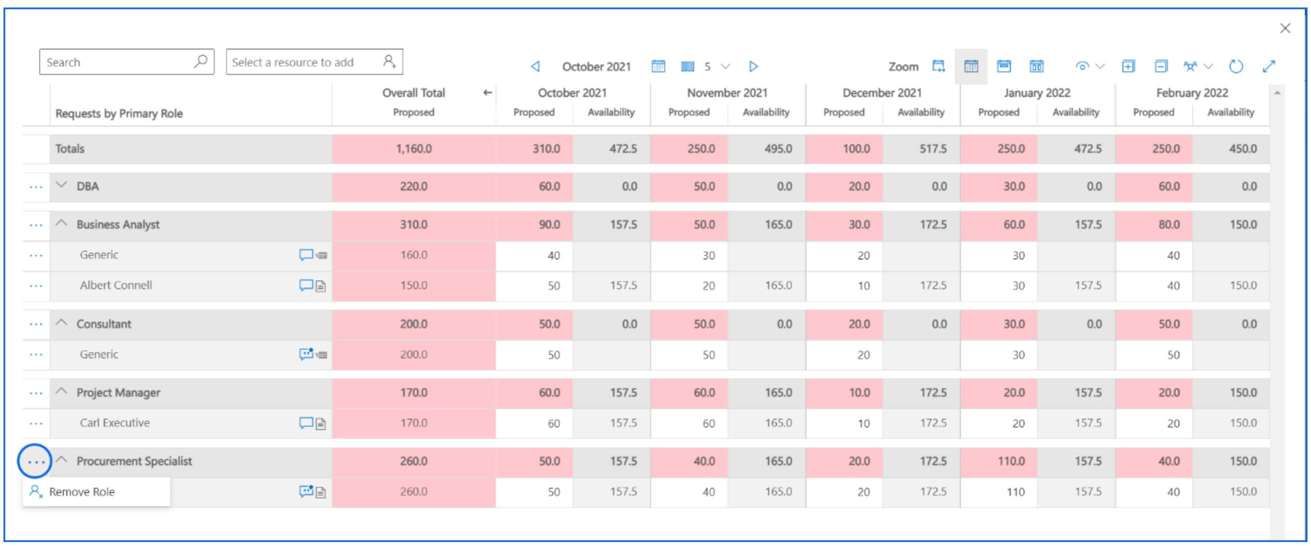
Important: At this point of the resource request process, the status of your proposed hours is displayed as **Draft.**

d. Attach comments to each resource request for the line managers processing your requests (recommended).

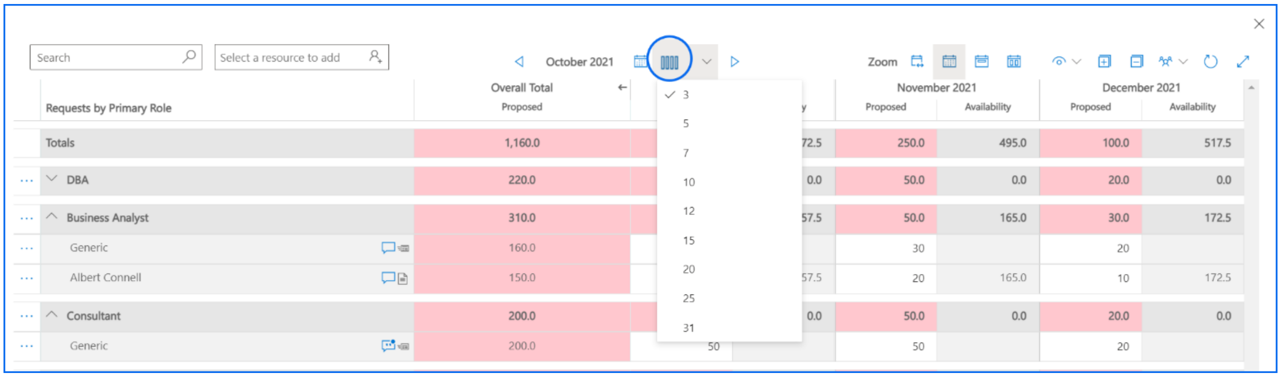


Tip: You can click the **Row Menu** button (**...**) in front of the named resource role row to view more options such as Change Resource that allows you to replace the named resource in the request for the visible periods; **Open Resource** that allows you to view more information about the named resource; or **Remove Resource** to delete the resource request from the list individually.

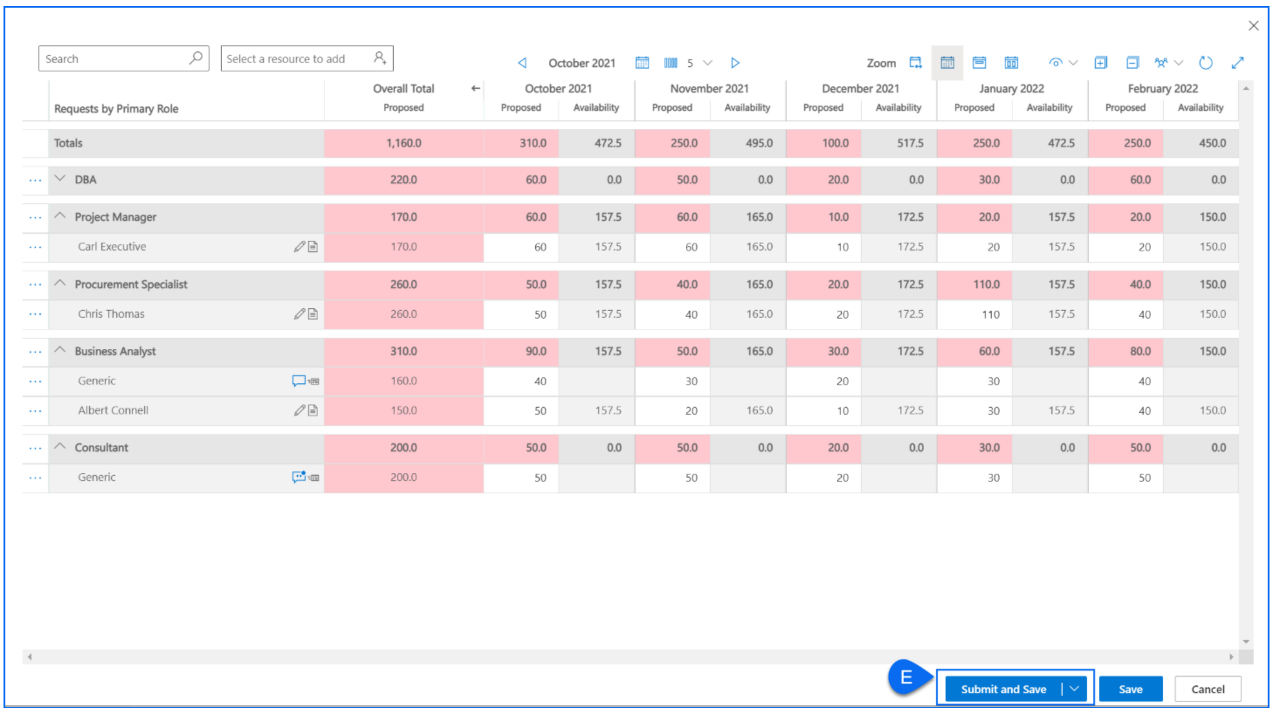
Tip: You can click the Primary Role Menu button (...) in front of the primary resource role name to remove the primary role and its associated resource requests from the list.



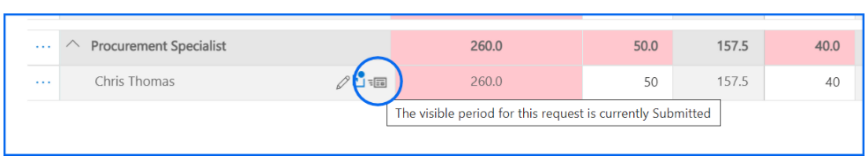
Important: Proposed hours recorded in all visible periods displayed on the page are submitted by default. If you want to control the period to be included in your resource requests (e.g., from *5 months* to only *3 months*), apply the appropriate fixed value for the number of **periods** you want to remain visible on the page before you click **Submit and Save.**



e. Once you have created the request for named resources for the project, click the **Submit and Save** button to formally submit all resource requests for the visible periods.



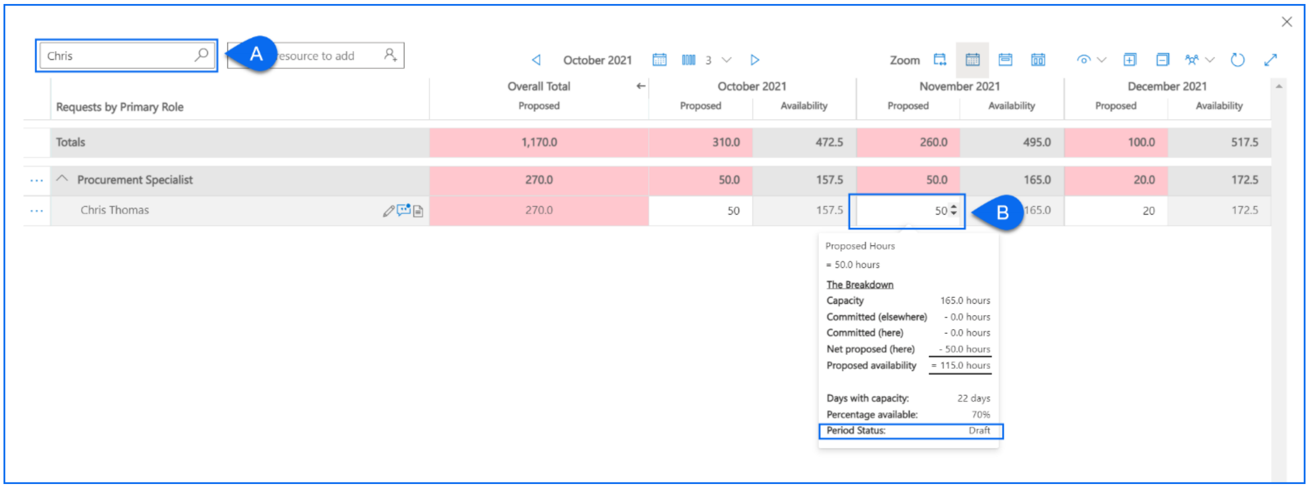
Tip: At this point of the resource request process, the status of your proposed hours (with attached comments) is displayed as **Submitted** and the cells they are contained in are highlighted in red denoting that the hours are not yet committed. The line managers can now review and process your resource requests from the **Resource Demand** dashboard in the platform.



3. MODIFY A SUBMITTED REQUEST FOR NAMED RESOURCES

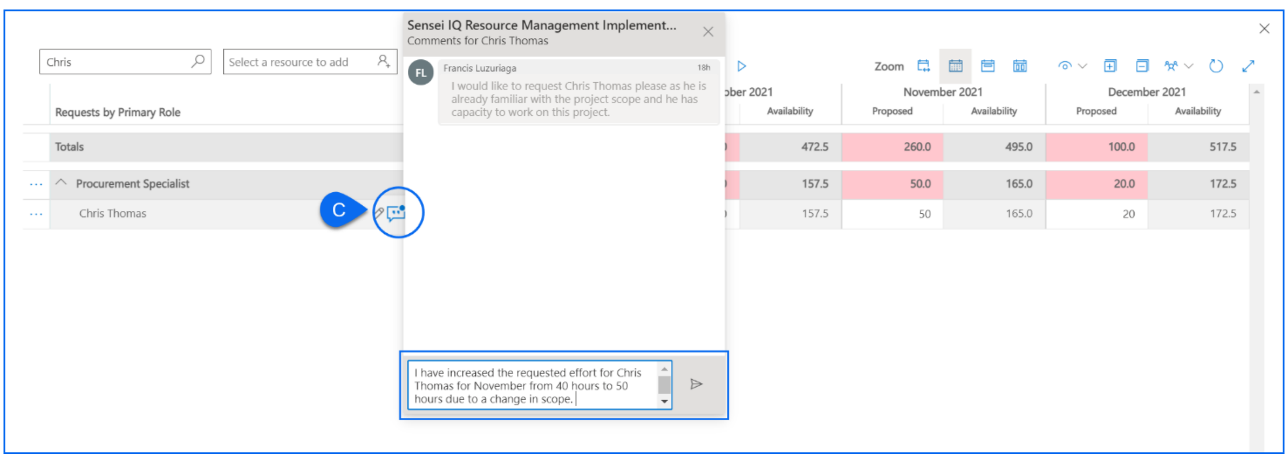
a. From the **Resource Plan** tab, locate the named resource row you want to update using the **Search** field.

b. Modify the proposed hours for the visible period in the **Proposed** column.



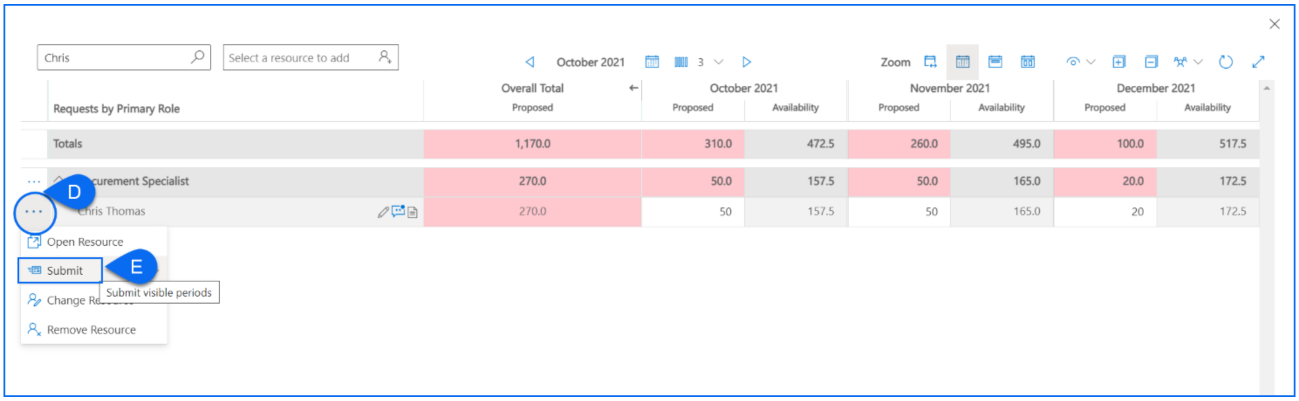
Tip: At this point of the resource request process, the status of your proposed hours for the modified resource request reverts to **Draft.**

c. Attach **comments** to the modified resource request for the line managers processing your requests (**recommended**).

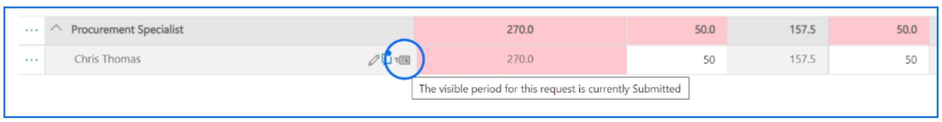


d. Click the **Row Menu** button **(...)** in front of the named resource row to view more options.

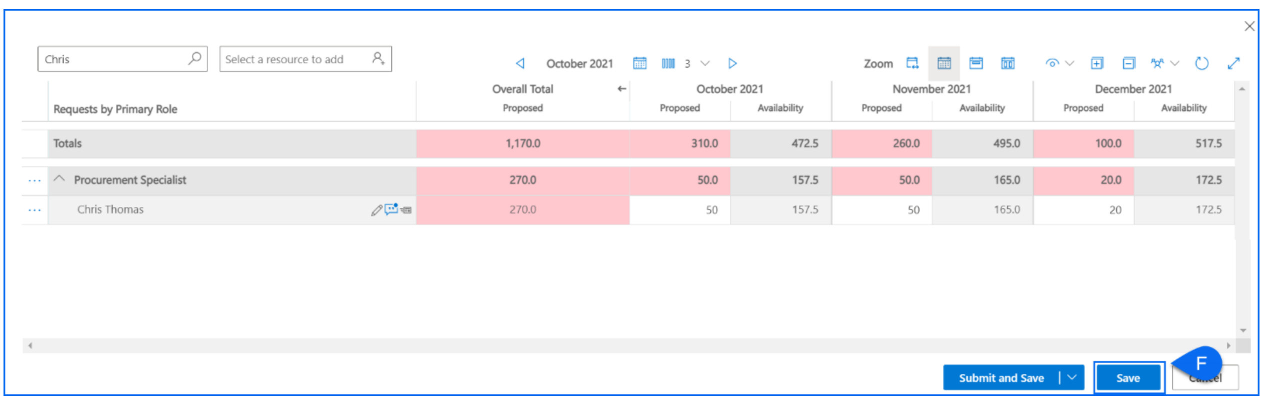
e. Click **Submit** to send the changes applied to the resource request for the visible periods.



Tip: At this point of the resource request process, the status of your proposed hours for the modified resource request changes to **Submitted.**

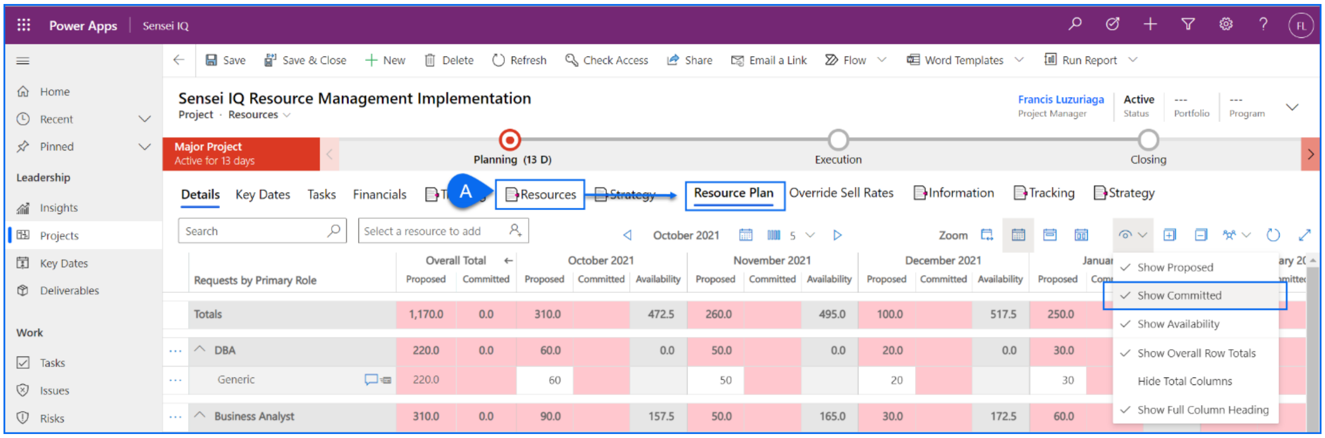


f. Finally, click the **Save** button to keep the changes to the resource request.

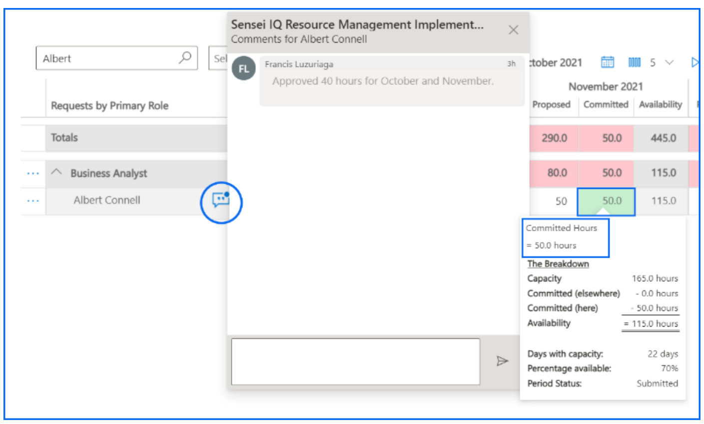


4. MODIFY AN EXISTING COMMITTED WORK FOR NAMED RESOURCES

a. Expand the **Resources** segment then click the **Resource Plan** tab and add **Show Committed** from the **View Options** menu.

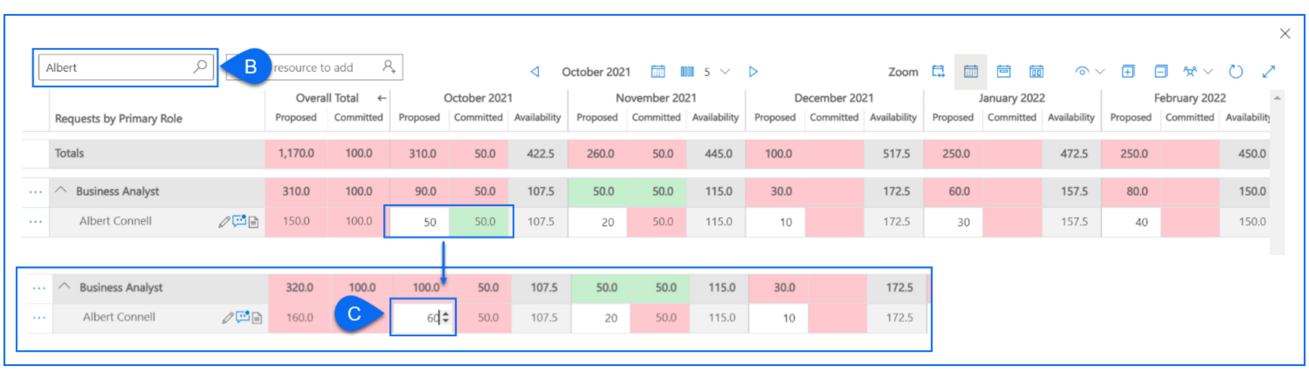


Tip: The approved resource allocation (with attached comments) is displayed in the **Committed** column as *read-only* and the cells they are contained in are highlighted in green denoting the committed hours fulfilled by the line manager is equal to the proposed hours for the period requested. Otherwise, the cells they are contained in would be highlighted red denoting that the committed hours fulfilled by the line manager is either less or more than the proposed hours for the period requested.

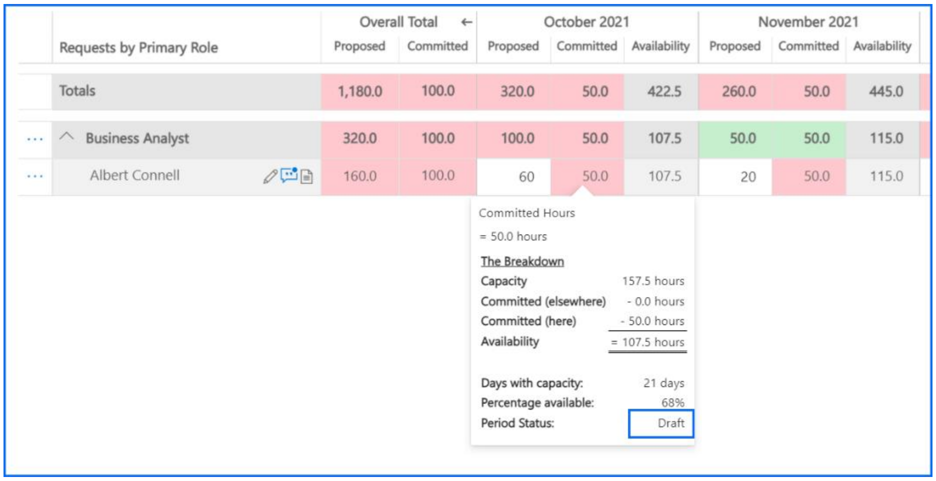


b. Locate the named resource row with committed work that you want to update using the Search field.

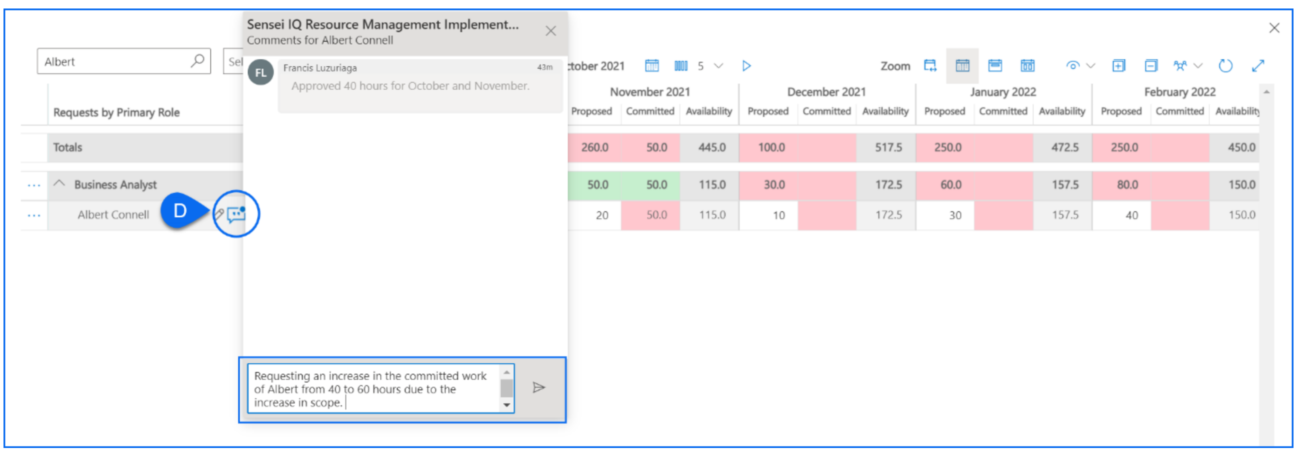
c. Modify the proposed hours for the visible periods using the Proposed column.



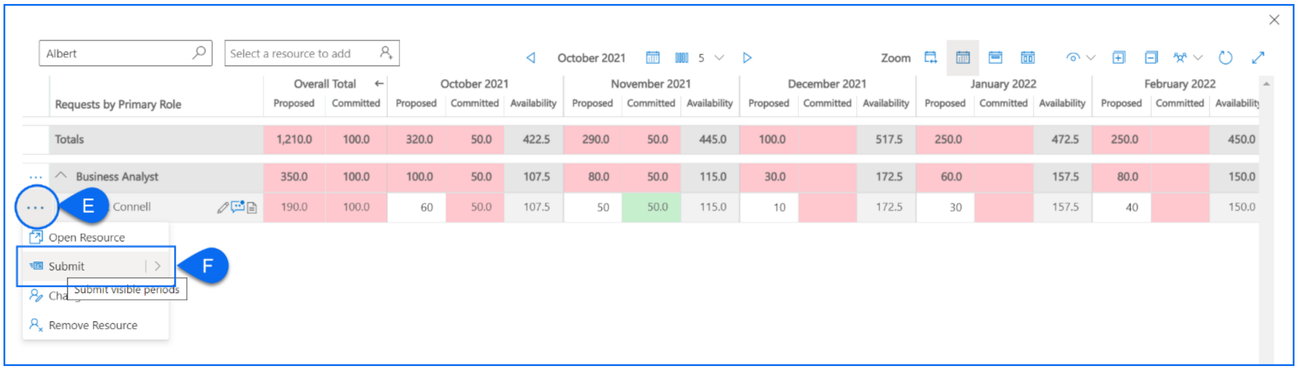
Tip: At this point of the resource request process, the status of your modified proposed hours in the visible period for the previously approved resource request reverts to **Draft.**



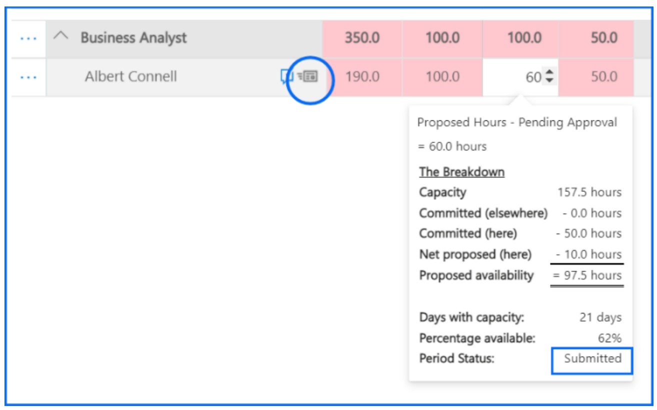
d. Attach **comments** to the modified resource request for the line managers processing your requests (**recommended**).



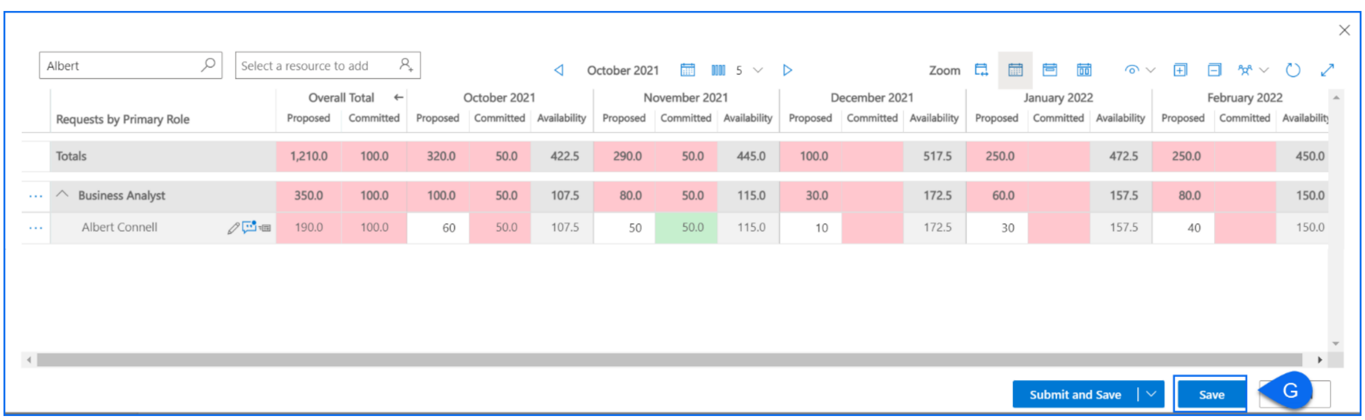
e. Click the **Row Menu** button (**...**) in front of the named resource role row that you updated to view more options.
f. Click Submit to send the changes applied to the resource request for the visible periods.



Tip: At this point of the resource request process, the status of the proposed hours for the modified resource request changes to **Submitted.**



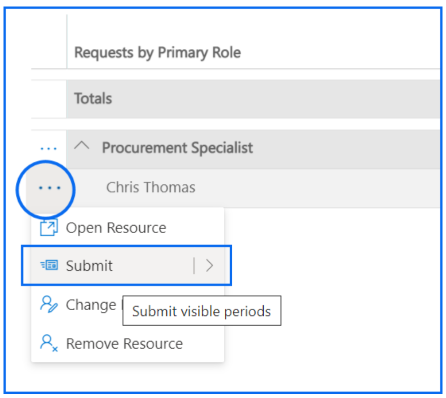
g. Finally, click the Save button to keep the changes to the resource request.



Important: There are four (4) methods to submit your requests for generic and/or named resources depending on the set fixed number of **periods** visible on the page.

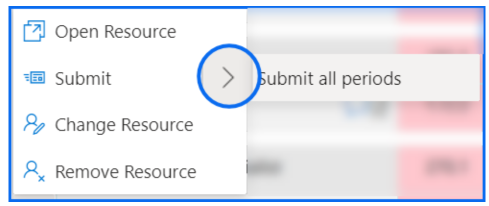
#1

Click the Row Menu button (...) in front of the resource row to view the Submit option to submit proposed hours for each resource request across all visible periods displayed on the page individually.



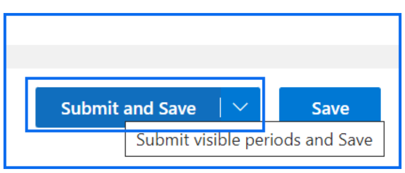
#2

Click the chevron arrow next to the Submit button to view the Submit all periods option to submit proposed hours for each resource request across all periods that contain proposed hours for that single row whether visible or not displayed on the page individually.



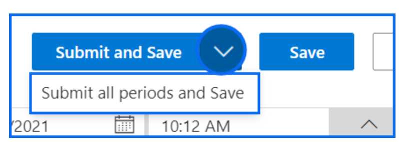
#3

Click the Submit and Save button at the bottom of the form to submit proposed hours for resource requests across all visible periods displayed on the page in bulk.



#4

Click the chevron arrow next to the Submit and Save button and select Submit all periods and Save at the bottom of the form to submit proposed hours for resource requests across all periods that contain proposed hours whether visible or not displayed on the page in bulk.



Note: If Resource Approval Notifications Flows are enabled in your organisation's the platform solution, both the line manager and project manager are notified when resource requests are created, fulfilled and/or modified later.

