

Overview

This Job Aid defines the steps to follow when defining the resource plan for new project proposals in the platform.

Project governance includes project intake and prioritisation to ensure that all projects are approved before work takes place, and more importantly, that only appropriately selected projects are approved.

Typically, new project proposals are submitted with a business case, cost estimates, resource plan, and strategic impact assessments. Each project proposal is typically subjected to a governance workflow that guides the approval process.

At this point in the project proposal process, the project requester creates a resource plan when it is known which resource roles are required to support the proposed project and there is a need to justify the demand of work from those resource roles for a given time. Once the project proposal is selected and promoted to an approved project, this resource plan moves to the project record. Once it is converted to the project record, the project manager submits a request for resources and their proposed hours to be formally committed to the project. The request is then routed to the appropriate resource manager for review and approval.

Define proposal resource requirements

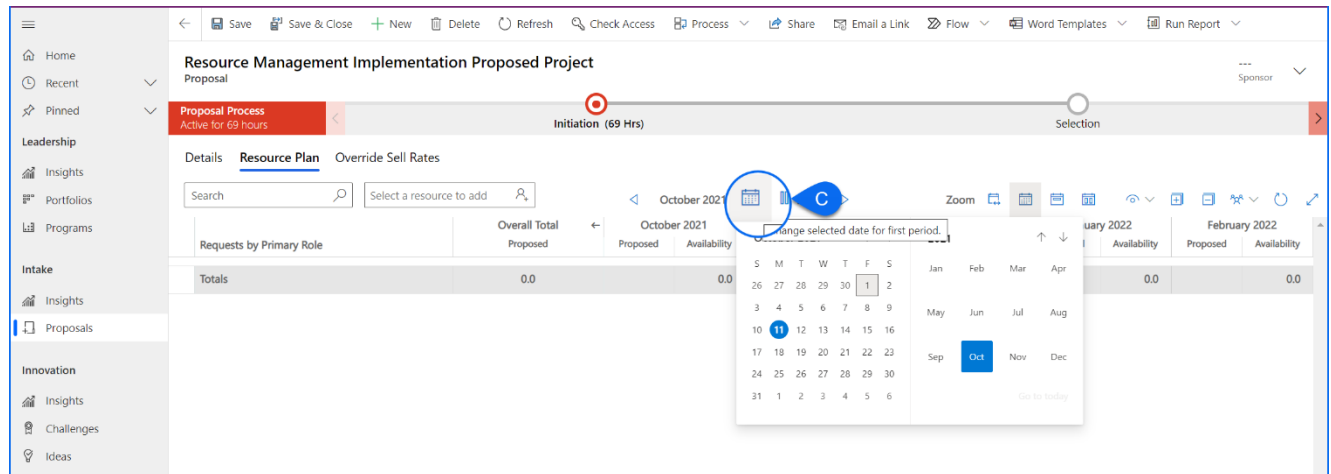
Project Requester Portfolios > Intake > Proposals > Resource Plan

1. SET THE RESOURCE DEMAND HORIZON

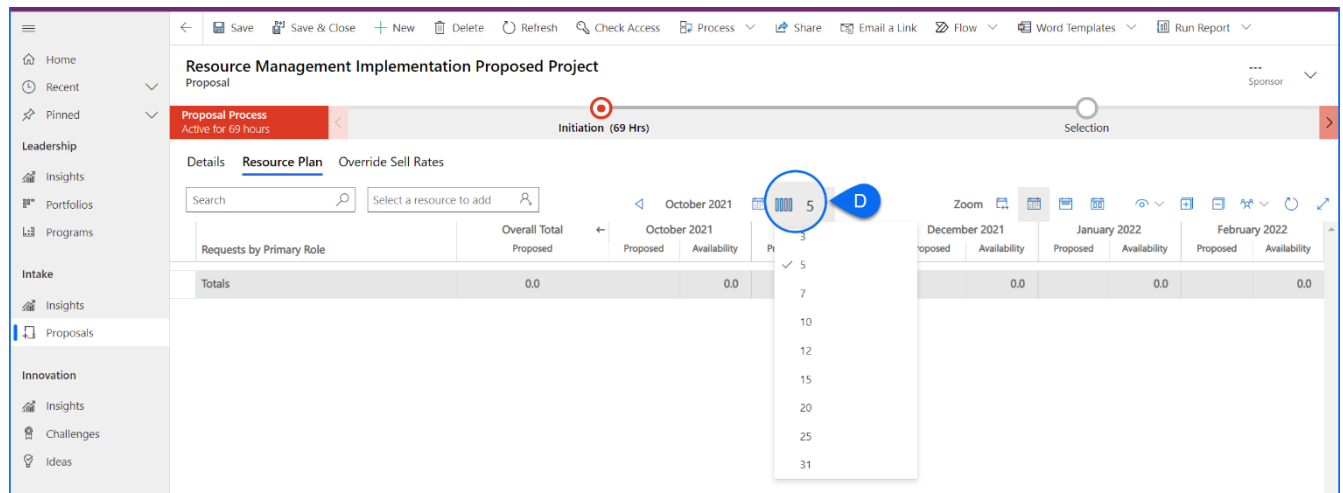
- Ensure you are in the **Portfolio** area and click **Proposals** in the **Intake** section.
- Open the proposal record and navigate to the **Resource Plan** tab.

Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	0.0	0.0		0.0		0.0		0.0		0.0	

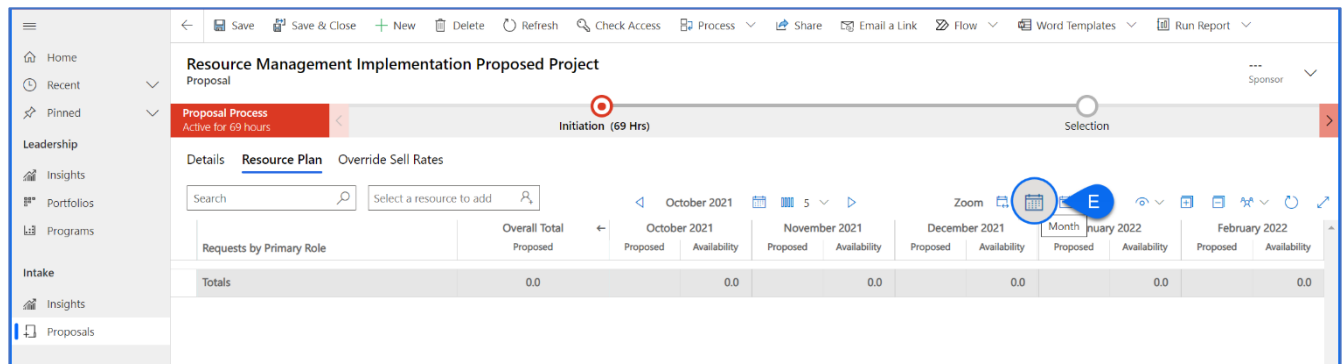
- Change the selected **date** for the first period that you require the generic resources from.



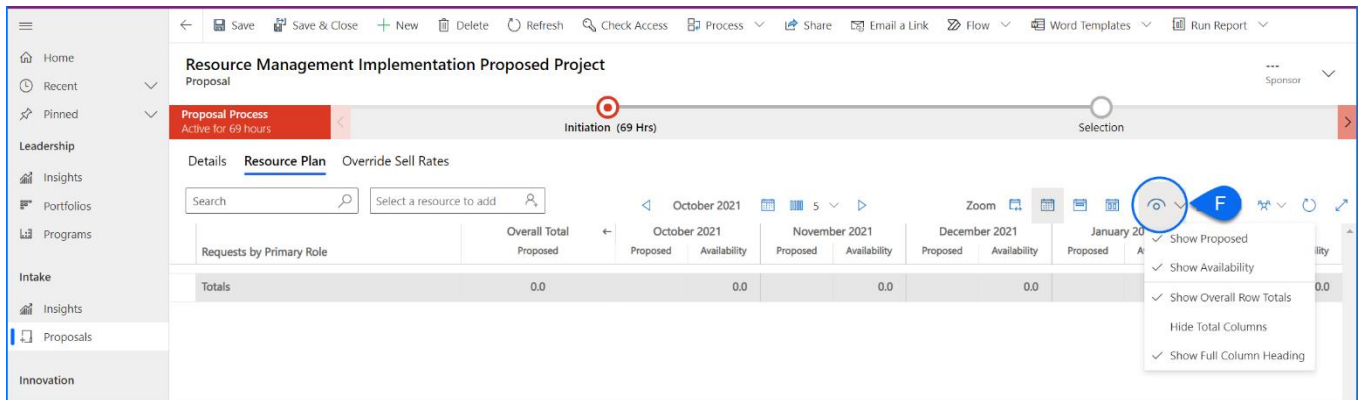
- d. Set the number of **periods** you want to be visible on the page.



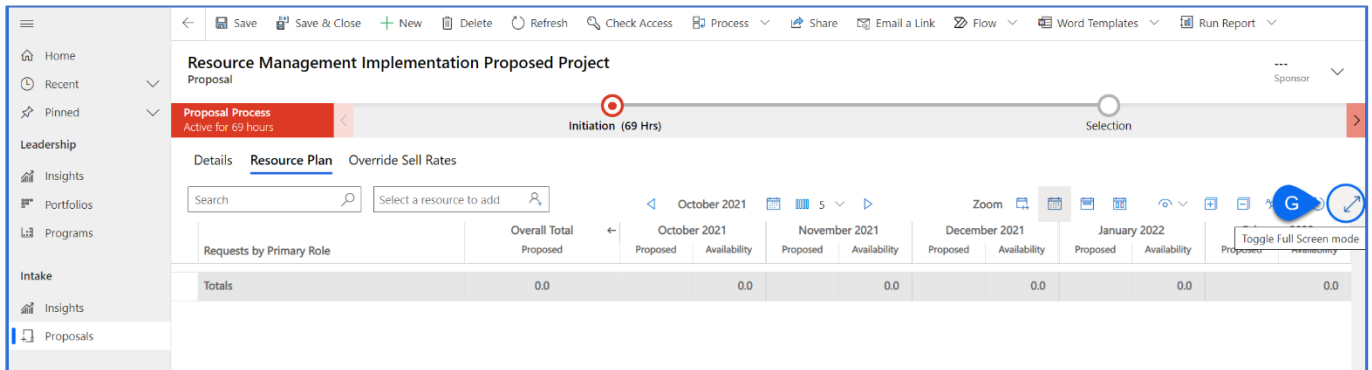
- e. Set the **timescale** of the requested period using the **Zoom** feature.



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

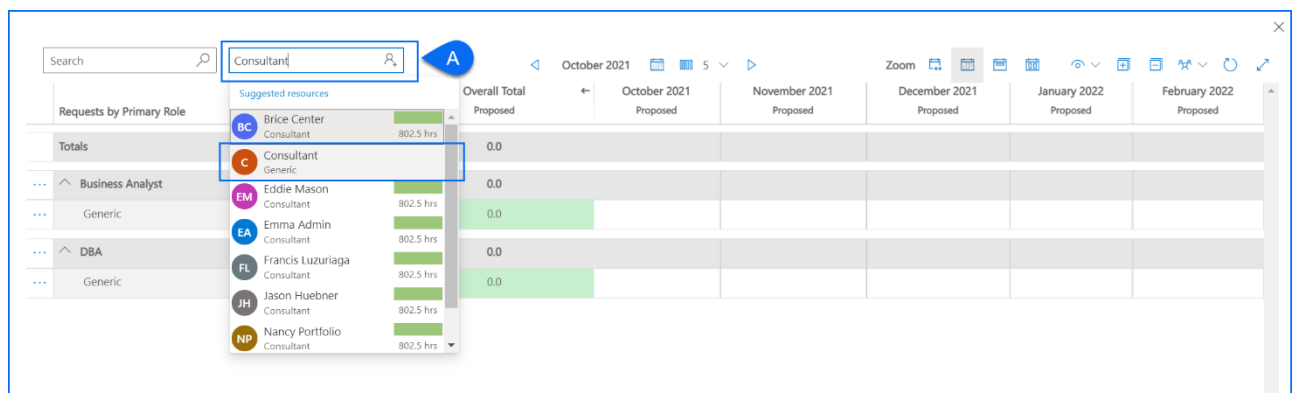


- g. Enable the **Toggle Full Screen Mode** option to switch the **Resources** screen to focus mode.

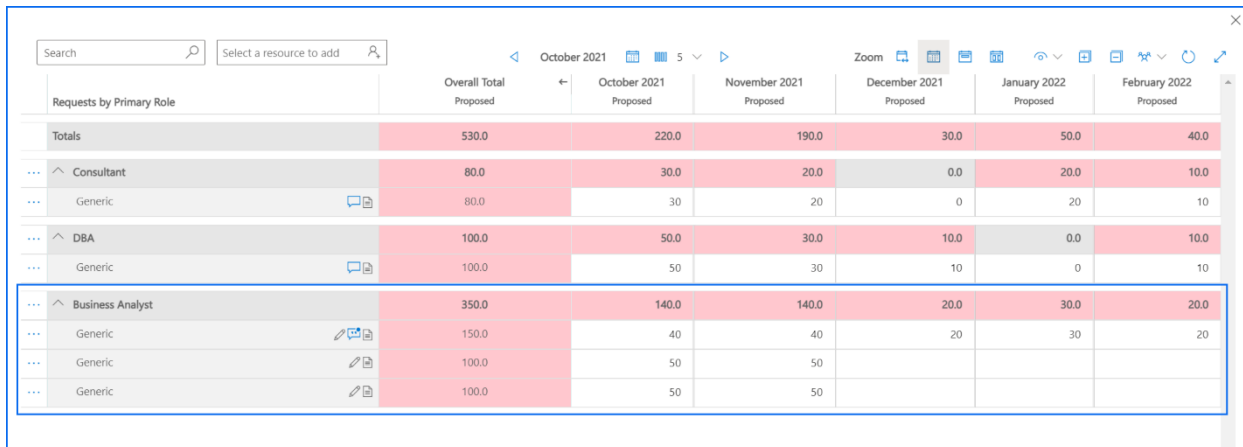


2. ADD A RESOURCE PLAN TO THE PROJECT PROPOSAL

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

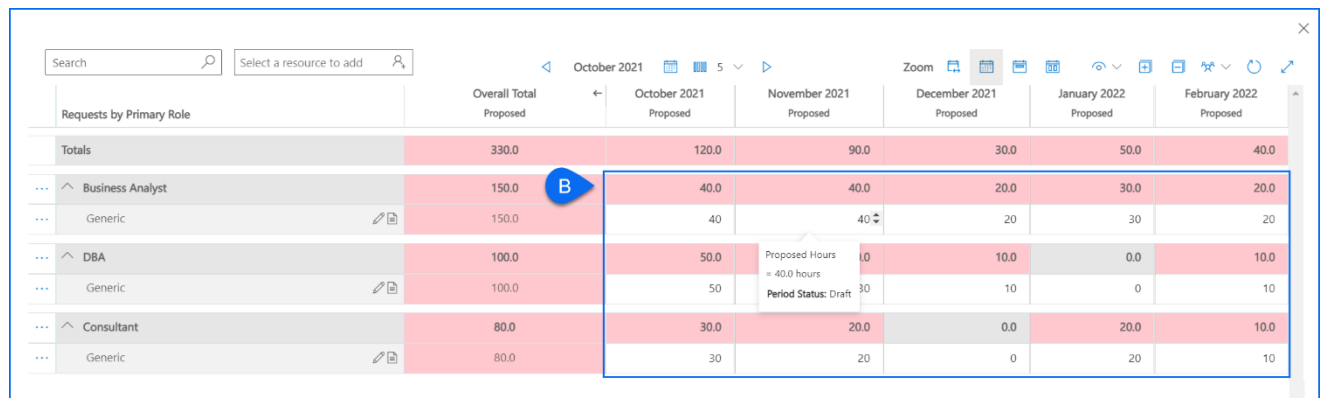


Pro Tip: If you need to request two or more resources of the same generic resource role for your project proposal, repeat this step until you have created multiple generic rows under the same primary role row. You should use this method so that a resource manager can replace each request for the same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



Requests by Primary Role	Overall Total Proposed	October 2021 Proposed	November 2021 Proposed	December 2021 Proposed	January 2022 Proposed	February 2022 Proposed
Totals	530.0	220.0	190.0	30.0	50.0	40.0
Consultant	80.0	30.0	20.0	0.0	20.0	10.0
Generic	80.0	30	20	0	20	10
DBA	100.0	50.0	30.0	10.0	0.0	10.0
Generic	100.0	50	30	10	0	10
Business Analyst	350.0	140.0	140.0	20.0	30.0	20.0
Generic	150.0	40	40	20	30	20
Generic	100.0	50	50			
Generic	100.0	50	50			

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



Requests by Primary Role	Overall Total Proposed	October 2021 Proposed	November 2021 Proposed	December 2021 Proposed	January 2022 Proposed	February 2022 Proposed
Totals	330.0	120.0	90.0	30.0	50.0	40.0
Business Analyst	150.0	40.0	40.0	20.0	30.0	20.0
Generic	150.0	40	40	20	30	20
DBA	100.0	50.0	10.0	10.0	0.0	10.0
Generic	100.0	50	30	10	0	10
Consultant	80.0	30.0	20.0	0.0	20.0	10.0
Generic	80.0	30	20	0	20	10

- c. Attach **comments** to each resource request for the resource managers allocating the resources once the proposal becomes an approved project. (**recommended**).

Resource Management Implementation Prop...

Comments for Business Analyst

If this proposal becomes an approved project, I would like to request Albert Connell to be allocated as a Business Analyst to the project.

- d. Click the **Save** button to save your changes to the resource plan attached to your project proposal submission.

Resource Management Implementation Prop...

Comments for Business Analyst

Save

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

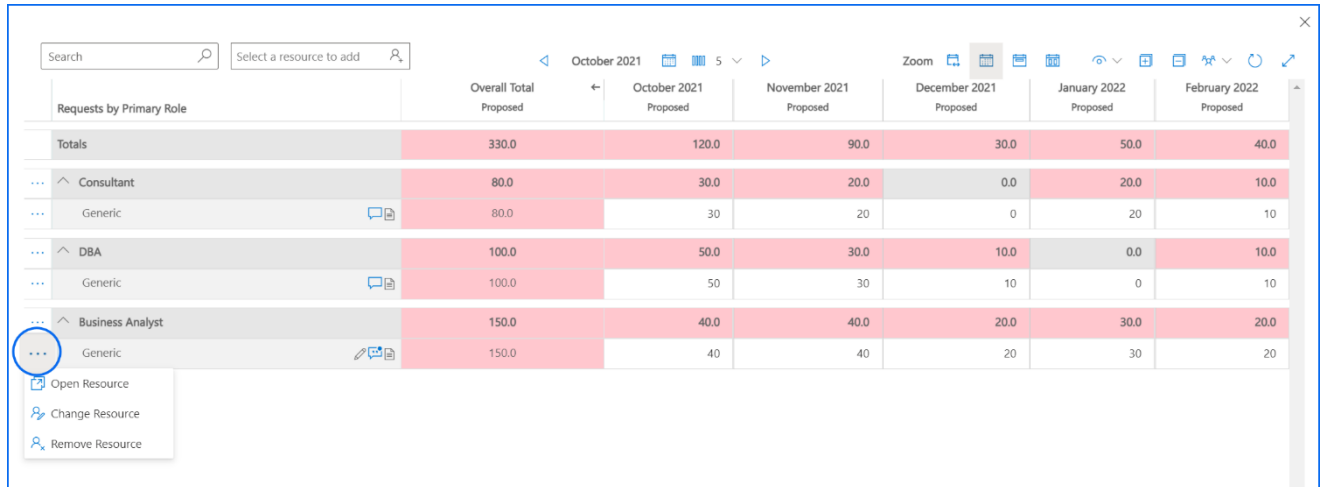
Resource Management Implementation Prop...

Comments for Business Analyst

Proposed Hours = 40.0 hours

Period Status: Draft

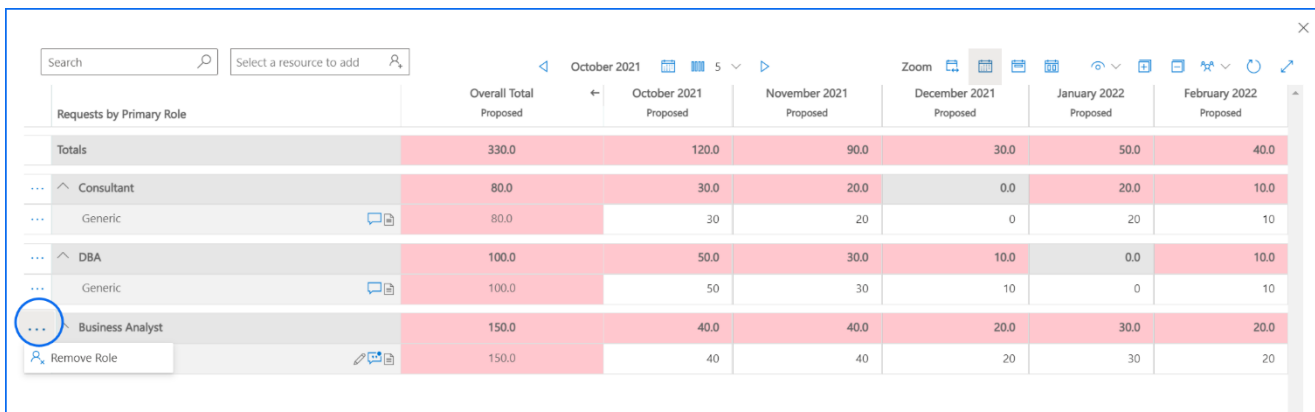
Tip: You can click the **Row Menu** button (...) in front of the generic resource role row to view more options such as **Change Resource** that allows you to replace the generic resource role in the resource plan; or **Remove Resource** to delete the resource request from the resource plan individually.



Requests by Primary Role		Overall Total Proposed	October 2021 Proposed	November 2021 Proposed	December 2021 Proposed	January 2022 Proposed	February 2022 Proposed
Totals		330.0	120.0	90.0	30.0	50.0	40.0
...	^ Consultant	80.0	30.0	20.0	0.0	20.0	10.0
...	Generic	80.0	30	20	0	20	10
...	^ DBA	100.0	50.0	30.0	10.0	0.0	10.0
...	Generic	100.0	50	30	10	0	10
...	^ Business Analyst	150.0	40.0	40.0	20.0	30.0	20.0
...	Generic	150.0	40	40	20	30	20

Open Resource
Change Resource
Remove Resource

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 resource plan.



Requests by Primary Role		Overall Total Proposed	October 2021 Proposed	November 2021 Proposed	December 2021 Proposed	January 2022 Proposed	February 2022 Proposed
Totals		330.0	120.0	90.0	30.0	50.0	40.0
...	^ Consultant	80.0	30.0	20.0	0.0	20.0	10.0
...	Generic	80.0	30	20	0	20	10
...	^ DBA	100.0	50.0	30.0	10.0	0.0	10.0
...	Generic	100.0	50	30	10	0	10
...	^ Business Analyst	150.0	40.0	40.0	20.0	30.0	20.0
...	Remove Role	150.0	40	40	20	30	20

Important: The resource plan attached to a proposal record cannot be submitted for review and approval by resource managers until the proposal becomes an approved project. Once the project proposal is selected and promoted to an approved project, this resource plan moves to the project record where the proposed hours can be adjusted and submitted for approval. The request is then routed to the appropriate resource manager for review and approval. The **committed work** allocated to each requested resource in the resource plan is displayed in the **Resource** tab of the approved project when accessed in the **Projects** area. Once a proposal is promoted to a project, a summary of the resource plan is recorded against the proposal only through the **History** tab.