



**Georgia
Tech**



CREATING THE NEXT

Resource Plan States: Who Can Do What and When?

Quick Reference Guide

Resource Plan States

Notes:

Request Change on a Requested or Confirmed resource plan puts the resource plan back in **Planning** state. Altering the resource plan record itself on an Allocated resource plan puts it back in **Requested** state.

Only **Admins** can edit an Allocated resource plan where the start date is today or earlier.

Extend Resource Plan only shows when in Allocated state and start date is today or earlier (can update end date directly if the start date is in the future).

Rejected plans have the **Rejected** state, which works the same as **Planning**.

If the Resource Plan is in...	The DM/ PM...	The RM...
Planned (or Rejected)	<ul style="list-style-type: none">Can edit entire resource plan	<ul style="list-style-type: none">Cannot see unless they change their filters on the Allocation Workbench
Requested	<ul style="list-style-type: none">Cannot edit resource plan but can Request Change on the resource plan recordCan edit Planned hours distribution over time	<ul style="list-style-type: none">Can edit the resource plan, Planned hours, and Conf/Alloc hoursCan confirm resources on resource plans
Confirmed	<ul style="list-style-type: none">Cannot edit resource plan but can Request Change on the resource plan recordCan edit Planned hours distribution over time	<ul style="list-style-type: none">Can edit the resource plan, Planned hours and Conf/Alloc hoursCan allocate resources on resource plan
Allocated	<ul style="list-style-type: none">Cannot edit resource plan but can Request Extension on resource plan to have the RM extend the end dateCan edit planned hours distribution over timeCan Complete the resource plan	<ul style="list-style-type: none">Can edit the resource plan if the start date is in the futureCan edit Planned hours and Conf/Alloc hoursCan extend the resource plan end dateCan Complete the resource plan