



CREATING THE NEXT

# Requesting Changes and Extending a Resource Plan

Quick Reference Guide

# Request a Change to a Resource Plan

As a **Resource User** (Demand Manager, Project Manager), you cannot modify the resource plan record itself (e.g. the User/ Group/ Role or the start/end dates) once it is in Requested state. To modify the core resource plan in Requested or Confirmed states, open the resource plan and click **Request Change**.

This will move the resource plan back to the Planning state, which will allow you to modify the resource plan and re-request the resources.

**Note:** as a Resource User, you can always change the Planned hours over time in the Resource View of a Demand or Project – no need to Request a change.

The screenshot displays the 'Resource Plan' interface for RPLN0001001. The top header bar includes a back arrow, a menu icon, the title 'Resource Plan RPLN0001001', a pencil icon, a three-dot menu, and buttons for 'Save', 'Update', 'Cancel', 'Request Change' (highlighted with a blue border), and 'Delete'. Below the header, the form contains several input fields: 'Name' (RPLN0001001 - Analysts), 'Number' (RPLN0001001), 'Start date' (2019-04-02), 'Task' (PRJ0010007), 'End date' (2019-12-31), and 'State' (Requested). There is also a 'Rate override' checkbox. Below these fields is a tabbed interface with four tabs: 'Resource Details' (selected), 'Request Details', 'Allocation Config', and 'Notes'. The 'Resource Details' tab shows 'Resource type' (Group), 'Members preference' (All members), 'Group' (Analysts), and 'Skills'. At the bottom of the form, there are buttons for 'Save', 'Update', 'Cancel', 'Request Change' (highlighted with a blue border), and 'Delete'.

# Extending a Resource Plan

As a **Project Manager**, if you need resources longer than you originally anticipated, you can request an extension of an Allocated resource plan **where the start date is today or earlier**. Requesting an extension does not have any impact on the existing allocated hours.

To request an extension, open a resource plan in Allocated state where the start date is previous to today's date, and click **Request Extension**.

You can also request an extension by clicking the 3-dots menu on the row of an Allocated resource plan within the **Resource** tab of a project.

The screenshot shows the 'Resource Plan' form for RPLN0001015. The form is divided into two main sections: 'Resource Details' and 'Request Details'. The 'Resource Details' section includes fields for Name (Analysis Oversight), Start date (12-23-2019), End date (07-16-2020), Rate override (unchecked), Resource type (Group), Members preference (All members), Group (Analysts), and Skills. The 'Request Details' section is currently active and shows the same fields. At the top right, there are buttons for Save, Update, Complete, Cancel, and Request Extension. At the bottom right, there is a button for Request Extension.

The screenshot shows the 'Resource' tab in a project view. The table displays resource plans for April 2020. The columns are 'Planned', 'Conf/Alloc', and 'Planned'. The first row shows a value of 26 in the 'Planned' column. A context menu is open over the row, showing options: Complete, Request Extension, and Cancel.

Week	Month	Hours	Total
Apr 2020			
Planned	Conf/Alloc	Planned	
		26	

# Extending a Resource Plan

- Once an extension has been requested, the Resource Manager will then see that an extension has been requested on their Allocation Workbench.
- If a resource plan is in Allocated state and the resource plan needs to be extended but the start date is in the future, contact the Resource Manager to **Reject** the resource plan, which will then allow you to edit the dates (and any other information) and re-request the resource plan.

# Extending a Resource Plan

As a **Resource Manager**, you can extend the date of an allocated Resource Plan and allocate resources for the extended period. Assume that work on a project has started, but you need to extend the date of an allocated resource plan because the project has been extended. The new date by which the resource plan is extended **does not have any impact on the existing allocated hours**.

1. Open a resource plan and click **Extend Resource Plan**.
2. In the Extend resource plan dialog, enter a new end date.
3. Click **OK**
  - The end date of the resource plan is updated.
  - For the extended period, allocation records are created with zero hours. Therefore, you will need to add the additional hours per resource during the new extended period of time.
  - Extending the resource plan invokes the rate model for getting the hourly rates, therefore, it will use the rates from the Rate Model (or the rate override if there is one on the resource plan).

The screenshot displays the 'Resource Plan' interface for RPLN0001004. The main form includes fields for Name, Number, Start date, End date, Task, State, and Rate override. Below these is a tabbed section with 'Resource Details', 'Request Details', 'Allocation Config', and 'Notes'. The 'Resource Details' tab is active, showing 'Resource type' as 'Group' and 'Members preference' as 'Any member'. At the bottom of the main form, there are buttons for 'Save', 'Update', 'Complete', 'Cancel', and 'Extend Resource Plan'. The 'Extend Resource Plan' button is highlighted with a blue circle and the number 1. A dialog box titled 'Extend resource plan' is open, showing a 'New end date' field with the value '2019-09-09' and a calendar icon. The dialog has 'Cancel' and 'OK' buttons. The 'OK' button is highlighted with a blue circle and the number 3. The 'New end date' field is highlighted with a blue circle and the number 2.



# Extending a Resource Plan

As a **Resource Manager** or **Project Manager**, to see resource plans where extensions have been requested and completed, simply add the **Extension** column (from the Configuration menu) to your project Resource tab view, or your Allocation Workbench view.

Alternatively, **Resource Managers** can create a new **Allocation Workbench view** to only see extension requests. To do this:

1. Create a new allocation board and select **Resource Plan** as the type.
2. Add a filter where the **Group = your group** and **Extension = Requested**.

The image shows two screenshots from a software application. The top screenshot displays the 'Configuration' dialog box, which allows users to configure the columns shown in the 'Resource Plan' view. The 'Extension' checkbox is highlighted with a blue box, indicating it should be selected. The bottom screenshot shows the 'Resource Plans' table in the 'Enterprise Integration Bus' view. The table has columns for 'Resource name', 'Planned', 'State', 'Group/R...', 'Extension', 'Task', and 'Pr'. The 'Extension' column is highlighted with a blue box, and the 'Requested' option is selected from the dropdown menu. The table lists three resource plans: '[G] Analysts' (180 Hours, Allocated), '[G] Analysts' (0 FTE, Canceled), and '[U] Jasmin Gum' (1,216 Hours, Allocated).

Resource name	Planned	State	Group/R...	Extension	Task	Pr
▼ Enterprise Integration Bus						
▶ [G] Analysts	180 Hours	● Allocated		Requested	Enterprise ...	2
▶ [G] Analysts	0 FTE	● Canceled			Enterprise ...	
▶ [U] Jasmin Gum	1,216 Hours	● Allocated			Enterprise ...	

# Extending a Resource Plan

- Once a Resource Manager has extended the Allocated resource plan and entered in the new Confirmed/Allocated hours, they can complete the request by opening the resource plan itself and setting the Extension to **Completed**.

This will tell the Project Manager that the resource plan has been extended and the hours for the new extended dates has been added.

The screenshot displays the 'Resource Plan RPLN0001015' interface. At the top, a blue notification bar states: 'Extension has been requested for the resource plan. Use 'Resource workbench' to allocate resources.' The form contains several fields: 'Name' (Analysis Oversight), 'Number' (RPLN0001015), 'Start date' (2019-12-23), 'End date' (2020-10-23), 'Task' (PRJ0010211), 'State' (Allocated), 'Rate override' (checkbox), 'Resource type' (Group), and 'Members preference' (All members). A blue box highlights the 'Extension' dropdown menu, which is open and shows three options: 'Requested' (selected), '-- None --', and 'Completed'. The bottom of the interface features a row of buttons: 'Save', 'Update', 'Complete', 'Cancel', 'Extend Resource Plan', and 'Delete'.