

# Requesting Changes and Extending a Resource Plan

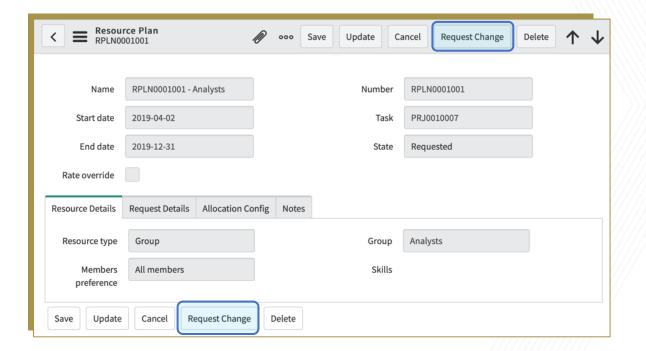
Quick Reference Guide

#### 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 rerequest 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.

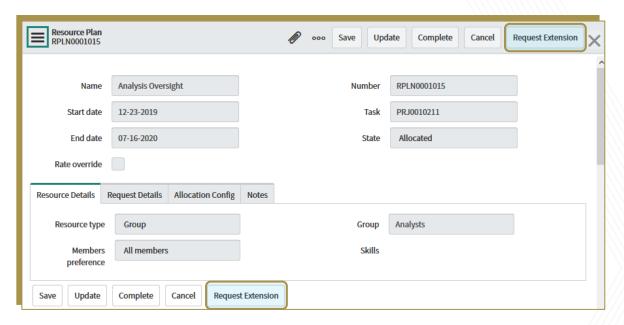


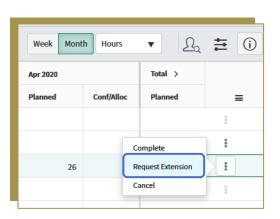


As a **Project Manager**, if you need resources longer than you originally anticipated, you can request an extension of an Allocated resource plan **where the start date is today or earlier**. Requesting an extension does not have any impact on the existing allocated hours.

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.





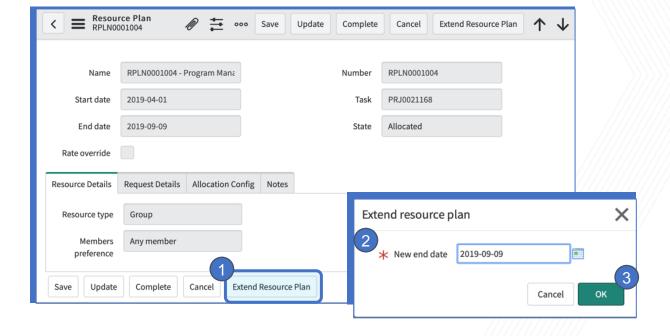


- Once an extension has been requested, the Resource Manager will then see that an extension has been requested on their Allocation Workbench.
- If a resource plan is in Allocated state and the resource plan needs to be extended but the start date is in the future, contact the Resource Manager to **Reject**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



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.
- 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).



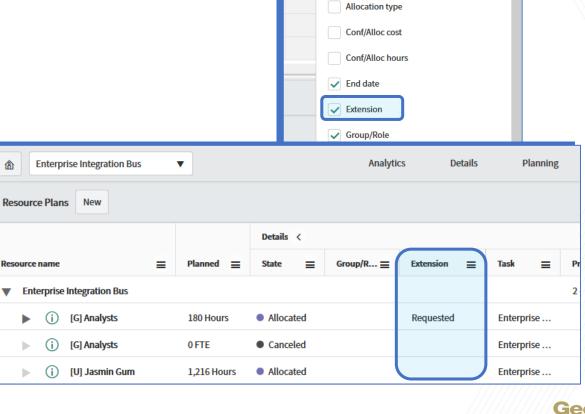


As a **Resource Manager** or **Project Manager**, to see resource plans where extensions have been requested and completed, simply add the **Extension** column (from the Configuration menu) to your project Resource tab view, or your Allocation Workbench view.

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

 Create a new allocation board and select Resource Plan as the type.

2. Add a filter where the Group = your group and Extension = Requested.



Configuration

RESOURCE PLAN COLUMNS

Resource name

Actual cost

Actual hours

Allocation spread



 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.

