

# Creating a New Resource Portfolio in Planview

NOTE: Proposal Managers Leads only. Read only access on a case by case basis (work grants required) for Proposal Managers.

NOTE: Maintenance of data is acceptable but additions or deletions are only done by the PMO.

## Planview Conventions and General Information

### Document Conventions

### Get Started

### New Resource Portfolio

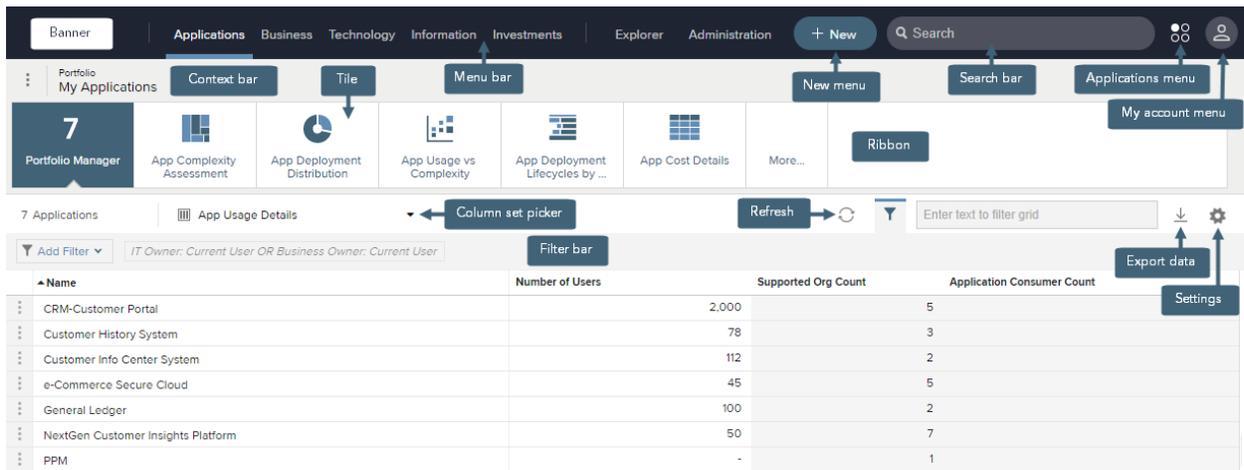
### Advanced Options

### Portfolio View

## 1. Planview Conventions and General Information

- 1.1. Unless otherwise indicated, mouse clicks (single or double) are done using the left mouse button.
- 1.2. Register for the Planview Customer Success Center [here](#).

Figure PVD1. General Planview user interface functionalities.



- 1.3. Access the **Preferences** dialog box by clicking the head and shoulders icon  in the upper right corner of the **My Overview** screen menu bar.

NOTE: Preferences remain set once initially selected unless they are changed later.

- 1.3.1. Click **General** on the left side of the **Preferences** dialog box and click the **down caret** next to **Timescale** on the right side, then click **Months** to select that preference from the listed options in the dropdown box.
  - 1.3.2. Click **Resources** on the left side of the **Preferences** dialog box and click the **down caret** next to **Timescale** on the right side, then click **Months** to select that preference from the listed options in the dropdown box.
  - 1.3.3. Click **Financial and Investment Planning** on the left side of the **Preferences** dialog box and click the **down caret** next to **Currency Scale** on the right side, then click **Standard** to select that preference from the listed options in the dropdown box.
  - 1.3.4. Also in the **Financial and Investment Planning** menu of the **Preferences** dialog box click the **down caret** next to **Currency Decimal Precision** on the right side, then click **zero [0]** to select that preference from the listed options in the dropdown box.
- See figures PVD2, PVD3, (and) PVD4.

Figure PVD2. Preferences / General.

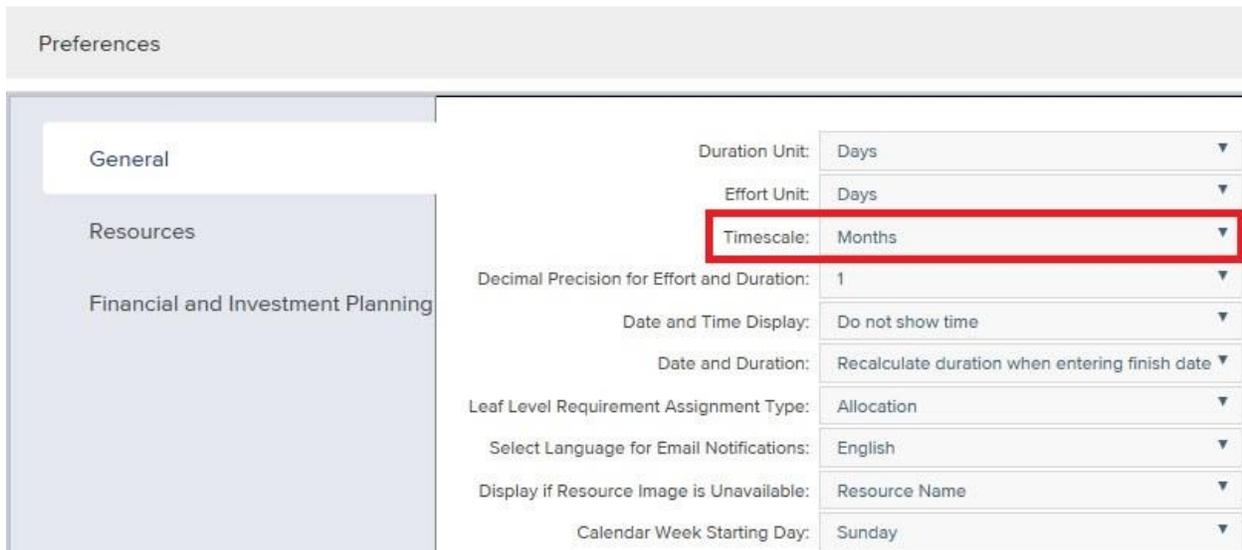
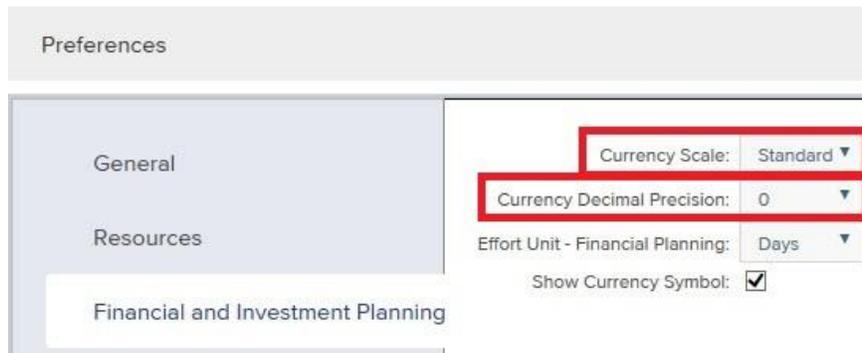


Figure PVD3. Preferences / Resources.



Figure PVD4. Preferences / Financial and Investment Planning.

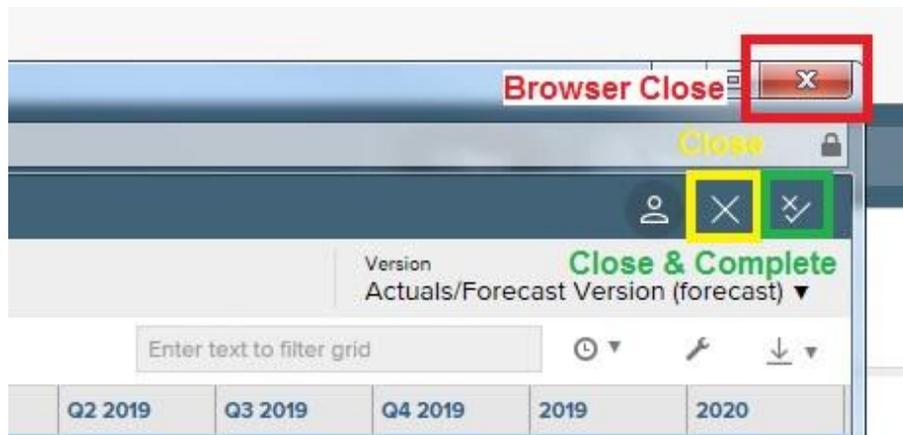


- 1.4. Only a Project Manager, Project Manager Lead, Proposal Manager, Proposal Manager Lead, or Planview Admin associated with a project can view and/or edit that project. Portfolio Managers can view the entire portfolio.
- 1.5. Planview is a browser-based tool running in a browser window (or windows). As such it does not install in the user's local PC and is available from anywhere the user is able to securely access the internet.
- 1.6. *Because* Planview is a browser-based tool running in a browser window (or windows), **do not** use the browser close icon to exit the tool. Use only the Planview Close icon (the X in the upper right corner of the toolbar) when in the **Work and Resource Management** screen (or) the Close & Complete icon in the **Financial Planning Details** screen to stop working in Planview. Work is **not** saved if the browser session itself is closed instead. See figures PVD5 (and) PVD6.

Figure PVD5. Work and Resource Management screen showing the Application Close icon in green and the browser close icon in red (partial screen capture only- the actual Planview screen displays additional information).



Figure PVD6. Financial Planning Details screen showing the Close & Complete icon in green, the Application Close icon in yellow, and the browser close icon in red (partial screen capture only- the actual Planview screen displays additional information).



- 1.7. In Planview the grouped icons to the right of some data selection fields (1) launch (from left to right) text search functionality, a list of bookmarks and recent selections from which to choose, and the data picker functionality. The data picker displays a directory of personnel and/or assignable resources with the appropriate Planview role assignments in cascading dropdown list form. See figure PVD7.
- 1.8. The down caret often mentioned in this document is the downward-facing chevron (2) next to some Planview data selection fields. When clicked these carets reveal dropdown lists of selectable options. See figure PVD7.
- 1.9. The Planview screen shots with hollow yellow arrows (3) have been horizontally and/or vertically compressed in the screen captures to aid readability. The actual screens are either wider, taller, or both. See figure PVD7.

Figure PVD7. Data picker icons, down caret, and screen alteration arrow (horizontally compressed screen capture. The actual Planview screen is wider).

New Work

Continue Close

**Basic Info** Required Fields |

Function	Test Data (L4)	  	1
Project Name	Test Project		
Work ID	1000473		
Internal Priority	Low		2
Project Category	Study / Pilot / POC		2



**Attributes** Required Fields |

Proposal Manager Lead	Bill Walton	  	1
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Continue Close

- 1.10. In data entry and selection dialog boxes, required data entry fields are indicated by a red vertical line (rule line) next to them. Another graphical reminder of this appears at the upper right of many screens where data entry fields in which required information must be entered appear. See figure PV1 (above).
- 1.11. Data entry dialog boxes that are required data entry fields with no known values must be populated with a (zero [0]).
- 1.12. Do not enter decimals in currency data entry dialog boxes. Round up instead. Example: Round \$43.51 up to \$44.
- 1.13. All currency values must be converted to US Dollar values in currency data entry dialog boxes. The currency converter approved for use by Huntsman Corporation LLC personnel is located at <https://www.xe.com/>. It can be accessed from the Tools menu on [The Hub](#).
- 1.14. Enter only whole numbers in currency data entry dialog boxes. Commas are not necessary when entering currency amounts- Planview will add them.
- 1.15. For data entry fields populated with dates, the calendar launch icon next to the data selection field can be used to open the calendar-based date selection tool to select dates. It is also possible to enter dates in these fields manually. If dates are entered without zeroes in front of single digit days or months Planview will correct them. Two-digit years will also be corrected to four-digit years.

- 1.16. If a workflow process step is left incomplete or data is entered erroneously or left unsaved the error triggers both an open Planview action item and an email message to the user.
- 1.17. All project documentation is to be uploaded to and maintained in the Hub Space for the project.
- 1.18. This document lists the Planview procedures in sequential order. It is important to understand that at several points during the Demand Intake workflow delays of several days, weeks, and even several months can occur between some of the workflow procedures- especially those later in the workflow.
- 1.19. A comprehensive glossary is available [here](#).

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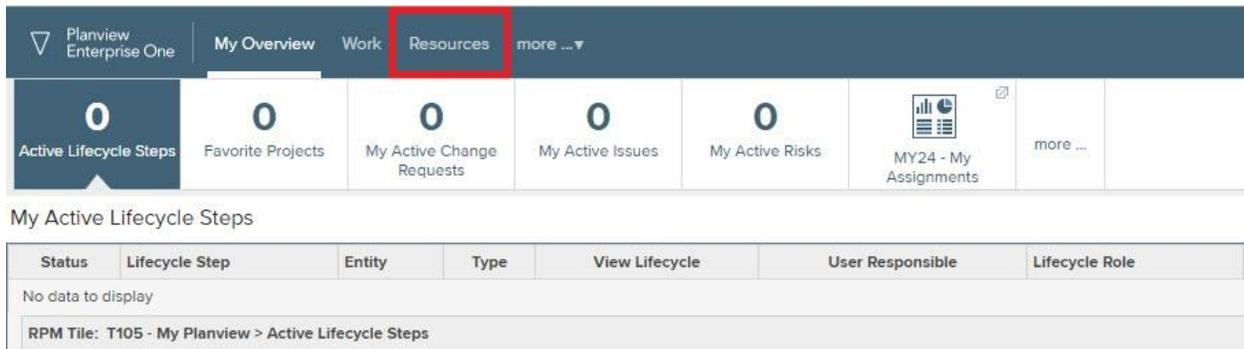
## 2. Document Conventions

- 2.1. **This is a Section (or) Sub-section name**
- 2.2. **This is a data field (or) screen name**
- 2.3. Click here when in a box
- 2.4. (Insert the variable [or] response here)
- 2.5. *NOTE: Notes look like this.*

## 3. Get Started

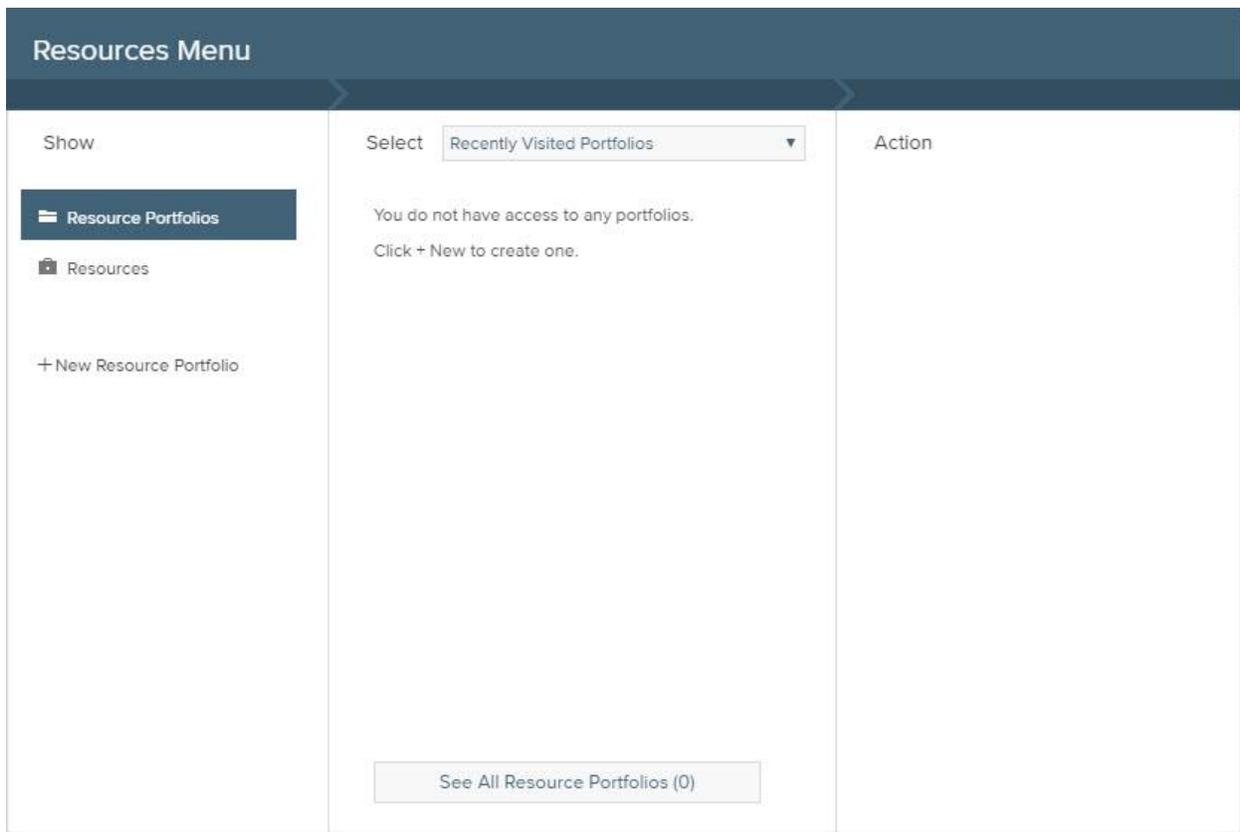
- 3.1. Open and login to Planview.
- 3.2. The **My Overview** screen is displayed.
- 3.3. Click on the Resources hyperlink in the menu bar at the top of the page. See figure PNP1.

Figure PNP1. Resources hyperlink in Menu Bar.



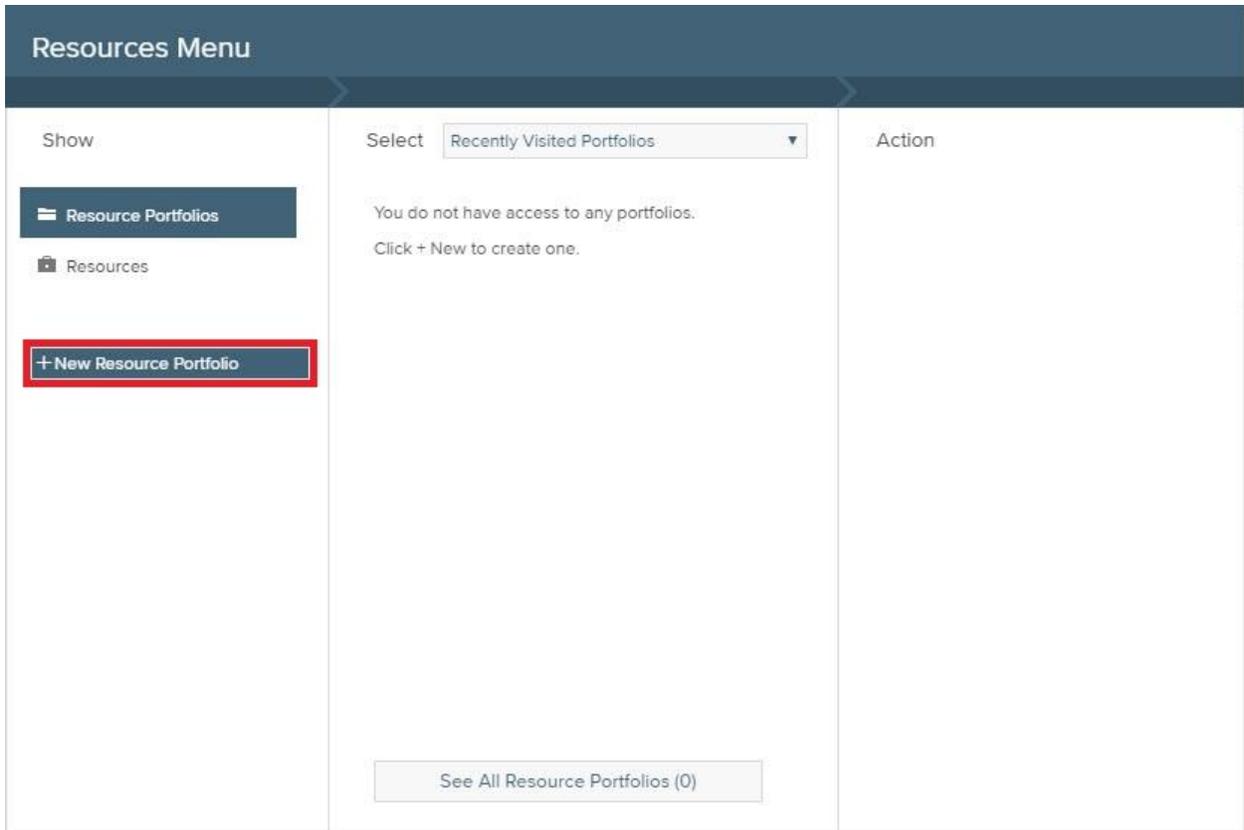
- 3.4. The **Resources Menu** is displayed. See figure PNP2.

Figure PNP2. Resources Menu.



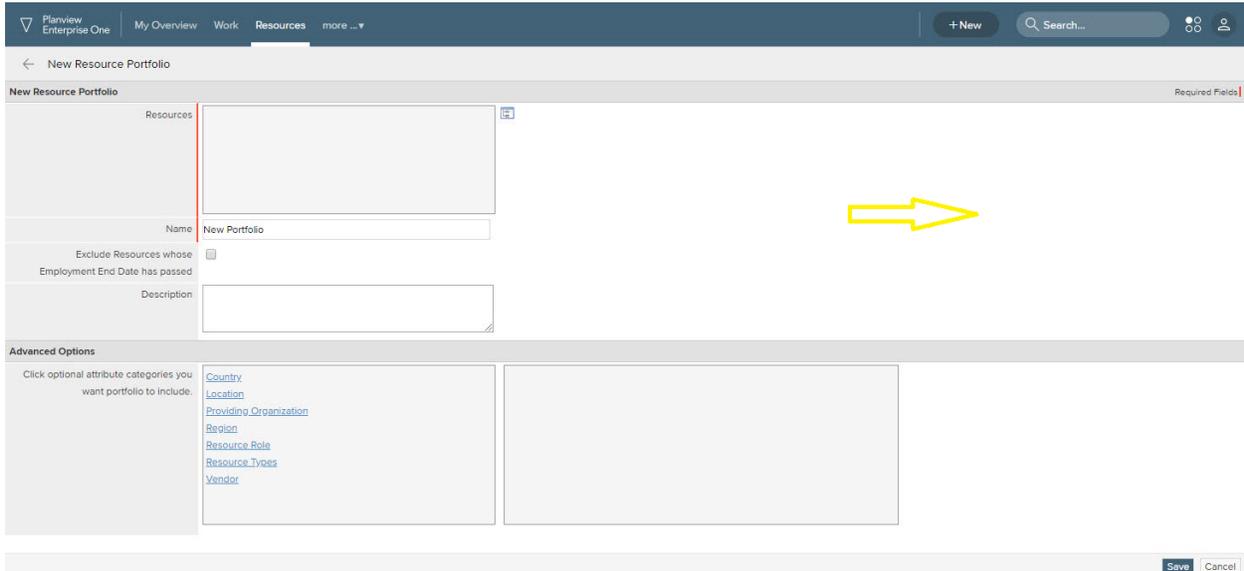
- 3.5. Click **+New Resource Portfolio** in the left **Show** column to open the **New Resource Portfolio** screen. See figure PNP3.

Figure PNP3. +New Resource Portfolio in the Work Menu.



3.6. The **New Resource Portfolio** screen is displayed. See figure PNP4.

Figure PNP4. New Resource Portfolio screen (modified horizontally compressed screen capture- the actual Planview screen is wider).

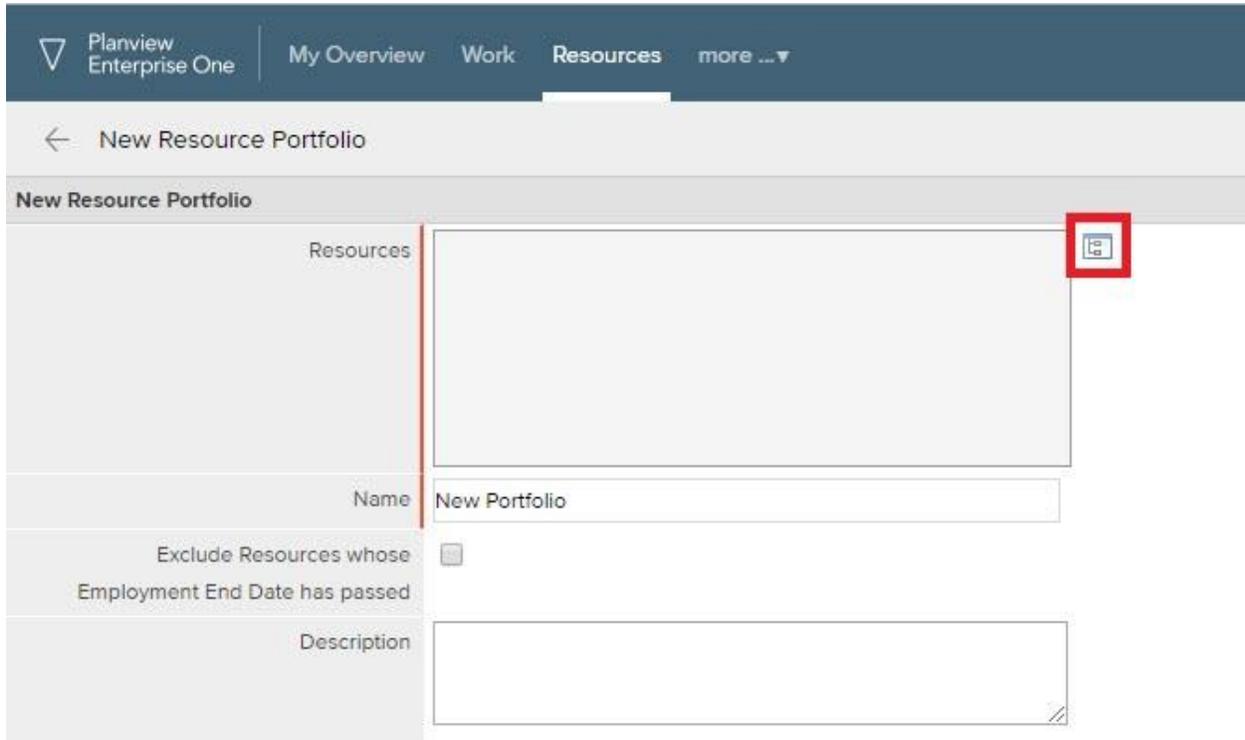


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## 4. New Resource Portfolio

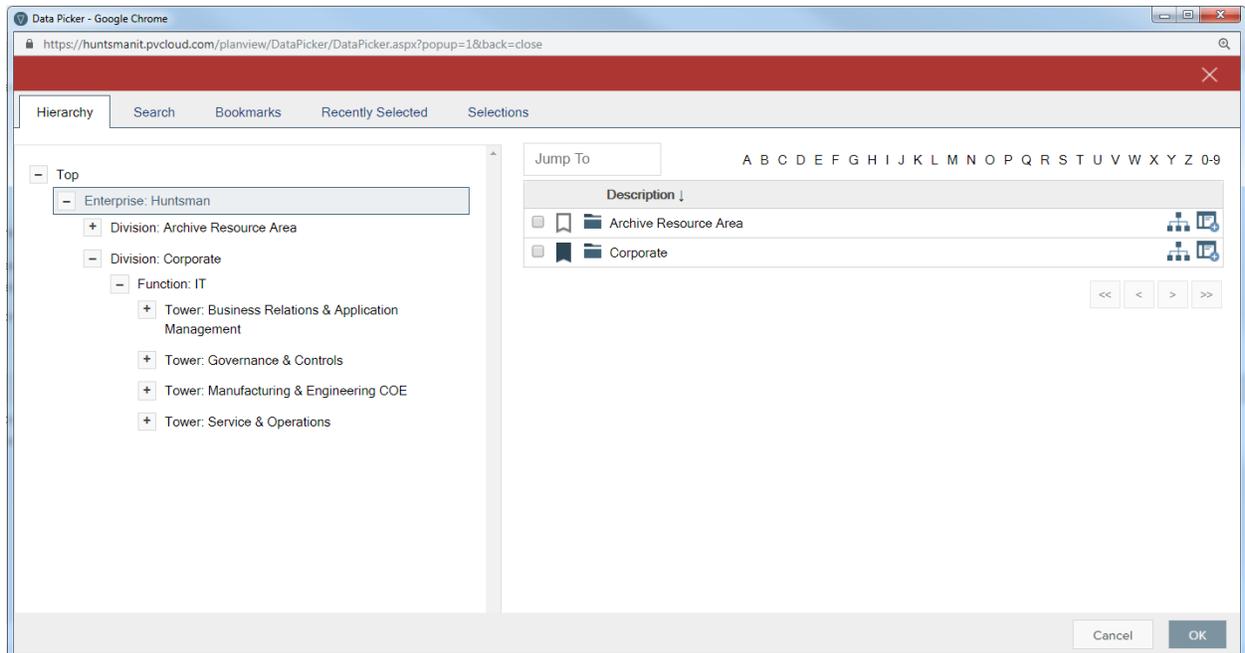
- 4.1. Click the **Select Resources icon** next to the **Resources** data selection box to launch the **Hierarchy** data picker screen. See figure PNP5.

Figure PNP5. Select Resources icon (partial screen capture only).



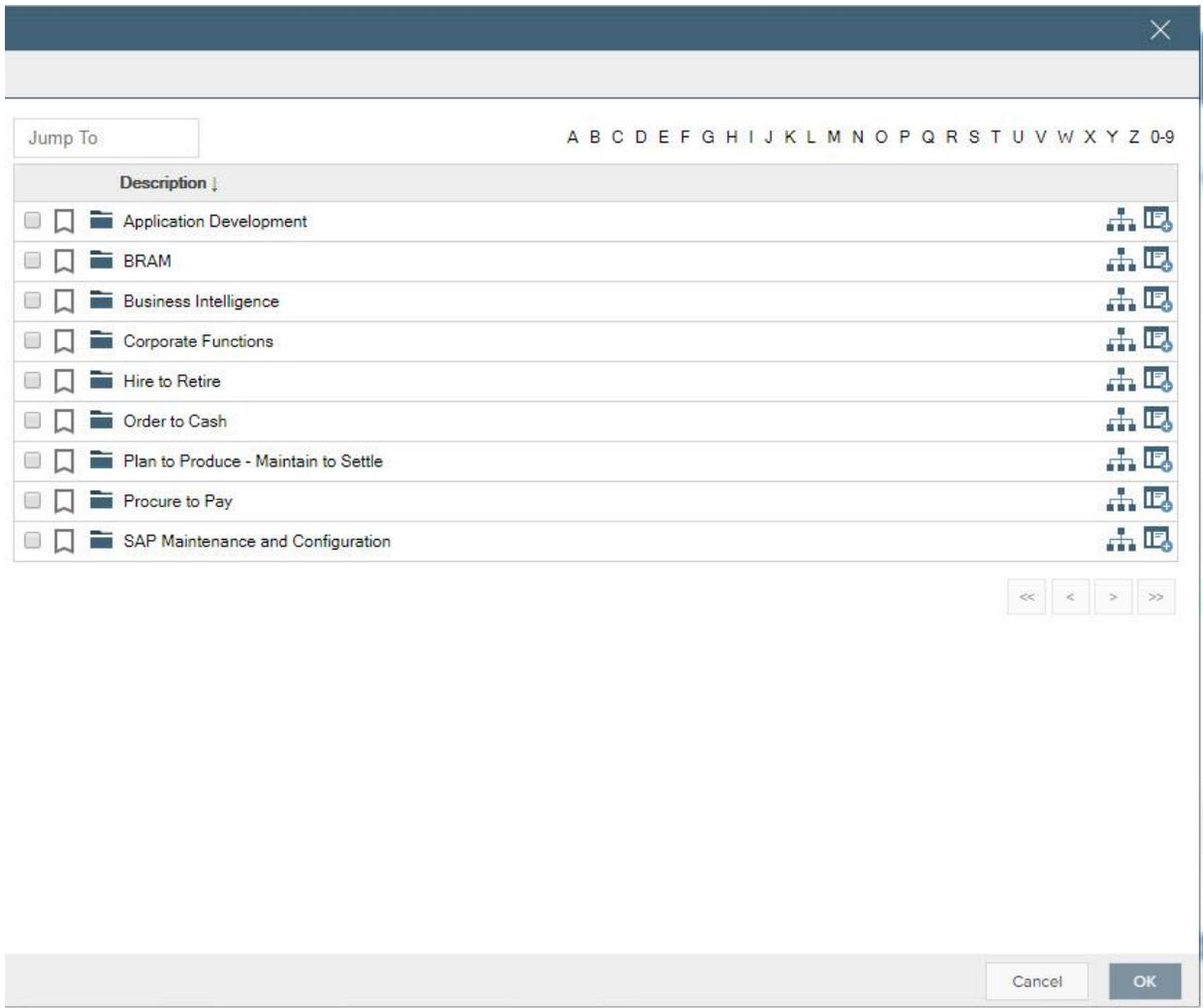
- 4.2. The **Hierarchy** data picker screen is displayed. See figure PNP6 and PNP7.

Figure PNP6. Hierarchy data picker screen.



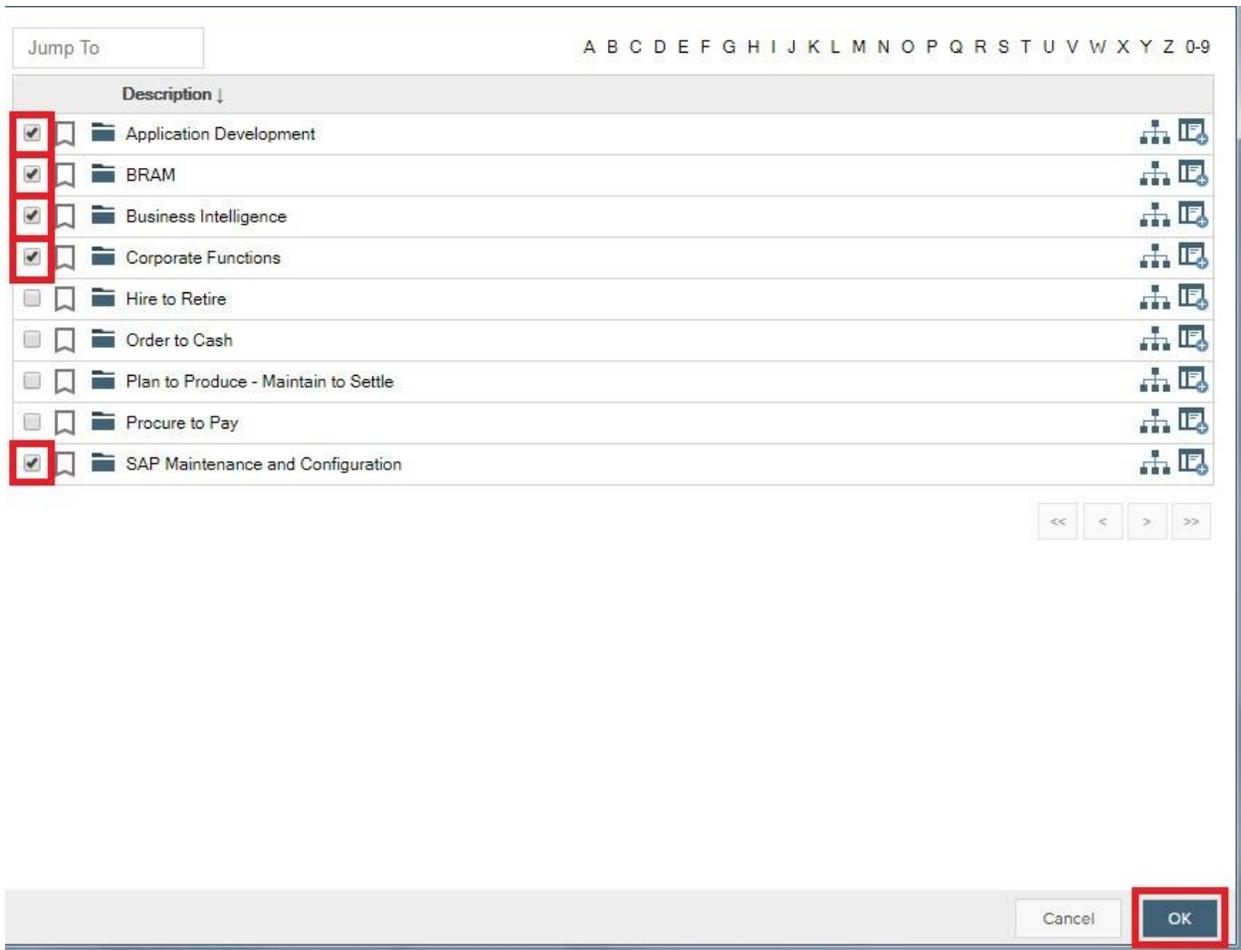
*NOTE: The options listed in the Hierarchy data picker screen will differ based on user permissions.*

Figure PNP7. Hierarchy data picker data screen (partial screen capture of right data column only).



- 4.3. Click the checkbox next to each **Team** to add the selected **Team** to the Portfolio.
- 4.4. When the desired **Teams** are selected click OK in the lower right corner of the **Hierarchy** data picker screen. See figure PNP9.

Figure PNP9. Teams selected and OK button highlighted.



4.5. After clicking **OK** in the **Hierarchy** data picker screen the selected **Teams** appear in the **Resources** data block on the **New Resource Portfolio** screen. See figure PNP10.

Figure PNP10. Selected team members now listed in Resources (partial screen capture only).

The screenshot shows a software interface for creating a New Resource Portfolio. On the left, there is a vertical list of resource categories: 'Resources', 'Name', 'Resources whose Employment End Date has passed', and 'Description'. The 'Resources' list is expanded to show a scrollable area containing the following items: 'Application Development', 'BRAM', 'Business Intelligence', 'Corporate Functions', and 'SAP Maintenance and Configuration'. Below the 'Resources' list is a text input field for 'Name'. To the right of the 'Name' field is a checkbox. Below the checkbox is another text input field for 'Description'.

4.6. Click in the **Name** data entry field to enter (the name of the Resource Portfolio).

*NOTE: The name of the Resource Portfolio should include reference to the project for which it is being created.*

4.7. Click the **checkbox** next to **Exclude Resources whose Employment End Date has passed** to apply that parameter to the Portfolio.

4.8. Click in the **Description** data entry field to enter (a description of the New Resource Portfolio).

*NOTE: The description entered here should include the name of the project for which the portfolio is being created. See figure PNP11.*

Figure PNP11. Completed New Resource Portfolio section (partial screen capture only).

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## 5. Advanced Options

*NOTE: Advanced Options enable the user to apply selection parameters to the Portfolio allowing narrowed down resource selections. See figure PNP12.*

Figure PNP12. Advanced Options (partial screen shot only).

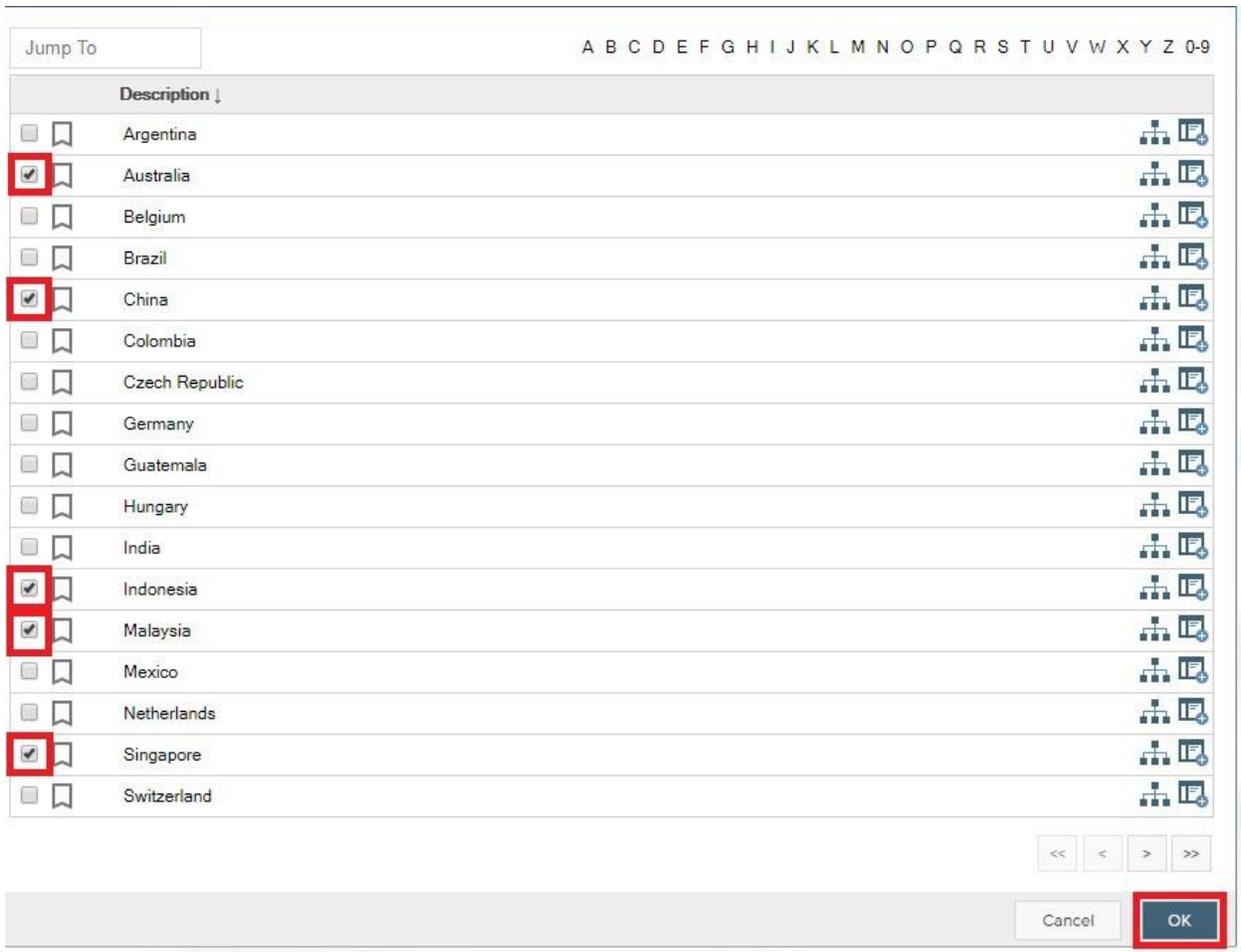
### 5.1. Country

5.1.1. Click the **Country** advanced option hyperlink in the **Advanced Options** data block to open the Hierarchy data picker screen listing attribute options for a **Country** restriction.

5.1.2. Click the **checkbox** to the left of each **Country** to be included in the Portfolio.

5.1.3. When **Country** selections are complete click **OK** in the lower right corner of **Hierarchy** data picker screen the screen to save the **Country** attribute selections. See figure PNP13.

Figure PNP13. Completed Country selections with OK highlighted.



5.1.4. The selected **Country** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP14.

*NOTE: As advanced option attributes are added the data block in which they are displayed will require scrolling to view all attributes selected.*

Figure PNP14. Selected countries in the data block to the right of the advanced options hyperlinks (partial screen capture only).



## 5.2. Location

- 5.2.1. Click the **Location** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Location** restriction.
- 5.2.2. Click the **checkbox** to the left of each **Location** to be included in the Portfolio.
- 5.2.3. When **Location** selections are complete click **OK** in the lower right corner of the **Hierarchy** data picker screen to save the **Location** attribute selections. See figure PNP13 (above) for an example.
- 5.2.4. The selected **Location** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP15.

Figure PNP15. Selected locations in the data block to the right of the advanced options hyperlinks (partial screen capture only).



### 5.3. Providing Organization

- 5.3.1. Click the **Providing Organization** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Providing Organization** restriction.
- 5.3.2. Click the **checkbox** to the left of each **Providing Organization** to be included in the Portfolio.
- 5.3.3. When **Providing Organization** selections are complete click **OK** in the lower right corner of the **Hierarchy** data picker screen to save the **Providing Organization** attribute selections. See figure PNP13 (above) for an example.
- 5.3.4. The selected **Providing Organization** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP16.

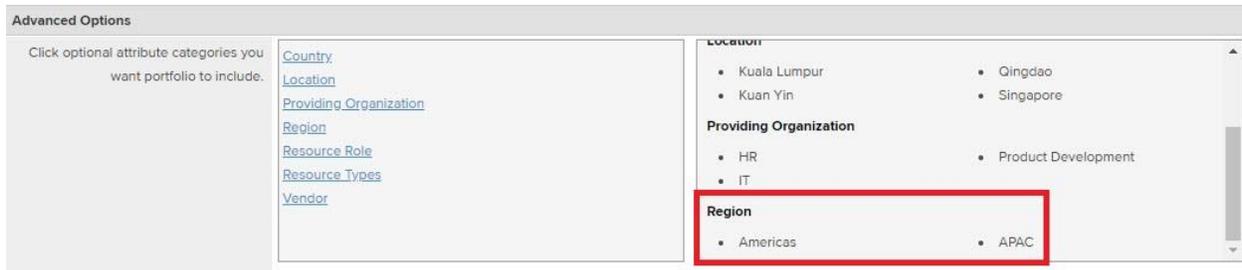
Figure PNP16. Selected providing organizations in the data block to the right of the advanced options hyperlinks (partial screen capture only).



## 5.4. Region

- 5.4.1. Click the **Region** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Region** restriction.
- 5.4.2. Click the **checkbox** to the left of each **Region** to be included in the Portfolio.
- 5.4.3. When **Region** selections are complete click **OK** in the lower right corner of the **Hierarchy** data picker screen to save the **Region** attribute selections. See figure PNP13 (above) for an example.
- 5.4.4. The selected **Region** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP17.

Figure PNP17. Selected regions in the data block to the right of the advanced options hyperlinks (partial screen capture only).



## 5.5. Resource Role

- 5.5.1. Click the **Resource Role** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Resource Role** restriction.
- 5.5.2. Click the **checkbox** to the left of each **Resource Role** to be included in the Portfolio.
- 5.5.3. When **Resource Role** selections are complete click **OK** in the lower right corner of the **Hierarchy** data picker screen to save the **Resource Role** attribute selections. See figure PNP13 (above) for an example.
- 5.5.4. The selected **Resource Role** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP18.

Figure PNP18. Selected resource roles in the data block to the right of the advanced options hyperlinks (partial screen capture only).



## 5.6. Resource Types

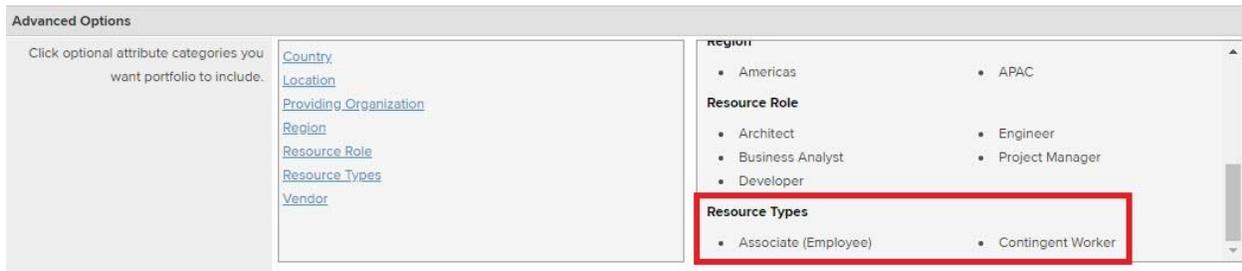
5.6.1. Click the **Resource Types** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Resource Types** restriction.

5.6.2. Click the **checkbox** to the left of each **Resource Types** to be included in the Portfolio.

5.6.3. When **Resource Types** selections are complete click **OK** in the lower right corner of the **Hierarchy** data picker screen to save the **Resource Types** attribute selections. See figure PNP13 (above) for an example.

5.6.4. The selected **Resource Types** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP19.

Figure PNP19. Selected resource types in the data block to the right of the advanced options hyperlinks (partial screen capture only).



## 5.7. Vendor

5.7.1. Click the **Vendor** advanced option hyperlink in the **Advanced Options** data block to open the **Hierarchy** data picker screen listing attribute options for a **Vendor** restriction.

5.7.2. Click the **checkbox** to the left of each **Vendor** to be included in the Portfolio.

5.7.3. When **Vendor** selections are complete click **OK** in the lower right corner of the **Hierarchy** data picker screen to save the **Vendor** attribute selections. See figure PNP13 (above) for an example.

5.7.4. The selected **Vendor** attribute(s) appear in the data block to the right of the **Advanced Options** hyperlinks. See figure PNP20.

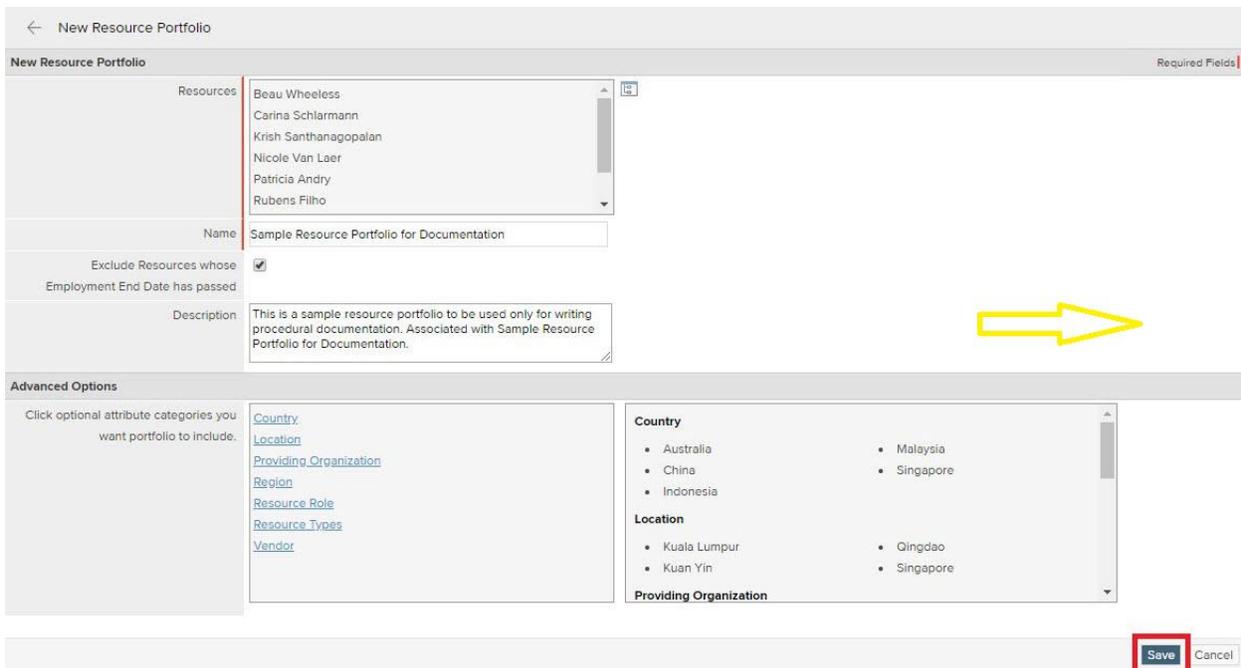
Figure PNP20. Selected vendors in the data block to the right of the advanced options hyperlinks (partial screen capture only).



5.7.5. Verify all data entered and selected is complete and correct.

5.7.6. After verification click **Save** in the lower right corner of the **New Resource Portfolio** screen to save the **New Resource Portfolio**. See figure PNP21.

Figure PNP21. Completed New Resource Portfolio with Save highlighted (modified horizontally compressed screen capture- the actual Planview screen is wider).



5.7.7. After **Save** is clicked in the **New Work Portfolio** screen the **Resource Info – Basic** version of the **Portfolio View** for the selected **Portfolio** is displayed.

*NOTE: The resource data displayed on the **Portfolio View** screen is determined by the parameters previously selected in the **New Resource Portfolio** screen. See figure PNP22.*

Figure PNP22. Portfolio View screen (partial screen capture- actual screen scrolls right and down).

The screenshot displays the Planview Enterprise Manager interface. At the top, there is a navigation bar with 'Planview Enterprise One', 'My Overview', 'Work', 'Resources', and 'more...'. Below this, a 'Resource Portfolio' section shows 'Sample Portfolio - Documentation Only' and 'View Portfolio View'. A dashboard area contains several tiles: 'Portfolio Manager' with a value of 132, 'RES01 - Portfolio Analysis', 'RES03 - Supply and Demand', 'RES04 - Effort Analysis', 'Requirements to Fill' (0), 'Assignments Requested' (0), 'Overloaded Resources' (0), 'Free Capacity this Week' (132), and 'Pending Assignments' (0). Below the dashboard is a 'Resource Info - Basic' table with the following columns: Name, Resource Start Date, Resource Finish Date, Resource Calend..., Organizational Resour..., Resource Quantit..., Timesheet Hours Per W..., User Name, and User Email. The table lists 13 resources, each with a unique ID and a star icon in the first column.

	Name	Resource Start Date	Resource Finish Date	Resource Calend...	Organizational Resour...	Resource Quantit...	Timesheet Hours Per W...	User Name	User Email
⋮ ☆	AK Aditi Kokil			Standard	Business Intelligence-	1.00	40.00		
⋮ ☆	AB Afrin Balig			Standard	SAP Maintenance anc	1.00	40.00		
⋮ ☆	AM Afzan Mohd Salud			Standard	SAP Maintenance anc	1.00	40.00		
⋮ ☆	AG Agus Given Yap			Standard	Application Developpr	1.00	40.00		
⋮ ☆	AK Akshay Kumar			Standard	BRAM-Business Analy,	1.00	40.00		
⋮ ☆	AV Alain Van den Broeck			Standard	SAP Maintenance anc	1.00	40.00		
⋮ ☆	AR Alalaine Rabe Quintans			Standard	SAP Maintenance anc	1.00	40.00		
⋮ ☆	AR Alexandre Rodrigues			Standard	SAP Maintenance anc	1.00	40.00		
⋮ ☆	AD Ameya Dandekar			Standard	Business Intelligence-	1.00	40.00		
⋮ ☆	AK Anubhav Kandpal			Standard	BRAM-Business Analy	1.00	40.00		
⋮ ☆	AS Anushiah S Kujalan			Standard	SAP Maintenance anc	1.00	40.00		

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## 6. Portfolio View

### 6.1. Resource View

*NOTE: Two view options are available in the Resource View screen: **Resource Info – Basic** and **RPM – Resource Capacity and Utilization**. The Resource View screen defaults to **Resource Info – Basic**.*

*NOTE: Several tiles appear in the Portfolio View menu. The majority of these tiles are not currently utilized.*

*NOTE: Resources to be added or deleted are owned by the Proposal Manager Lead but are actually executed by the PMO due to Planview permission schema.*

**6.1.1.** Click on the Action menu (the vertical ellipses or three dots) next to any listed resource to reveal the **Action menu** for that resource. See figure PNP23.

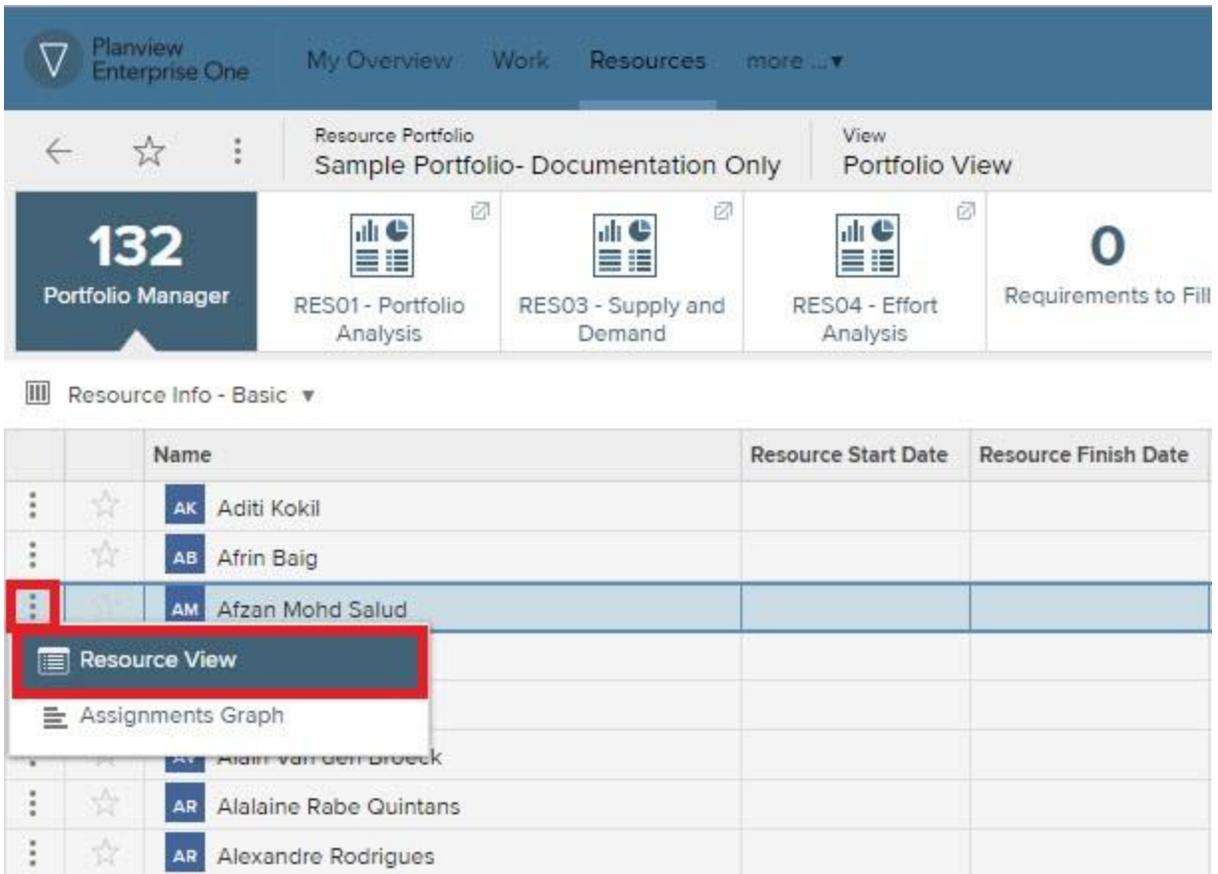
Figure PNP23. Action menu icon.

The screenshot shows a 'Resource Portfolio' interface. At the top, there's a navigation bar with a back arrow, a star icon, and a menu icon. The main title is 'Resource Portfolio' and 'Sample Portfolio- Documentation Only'. On the right, it says 'View Portfolio View'. Below this, there's a 'Portfolio Manager' section with a large '132' and 'Requirements to Fill' with a '0'. There are three analysis cards: 'RES01 - Portfolio Analysis', 'RES03 - Supply and Demand', and 'RES04 - Effort Analysis'. Below these is a 'Resource Info - Basic' section with a dropdown arrow. The main part is a table with columns: 'Name', 'Resource Start Date', and 'Resource Finish Date'. The table lists several resources, with 'Afzan Mohd Salud' (AM) highlighted in blue. A red box highlights the action menu icon for this resource, which is open, showing 'Resource View' and 'Assignments Graph' options.

	Name	Resource Start Date	Resource Finish Date
⋮	AK Aditi Kokil		
⋮	AB Afrin Baig		
⋮	AM Afzan Mohd Salud		
⋮	AV Alain van den Broeck		
⋮	AR Alaline Rabe Quintans		
⋮	AR Alexandre Rodrigues		

6.1.2. Click Resource View to open the **Resource View** screen for that resource. See figure PNP24.

Figure PNP24. Action menu and Resource View selection (partial screen capture only).



6.1.3. The **Resource View** screen for the selected resource is displayed. See figures PNP25 and PNP26.

Figure PNP25. Resource View screen (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).

The screenshot shows the 'Resource View' page for 'Afzan Mohd Salud'. The page is divided into several sections:

- Resource Structure:** Enterprise: Huntsman, Division: Corporate, Function: IT, Tower: Business Relations & Application Management, Sub-Tower: Global Business Process and Application Management, Team: SAP Maintenance and Configuration.
- Associated User:** NA
- Organizational Resource:** SAP Maintenance and Configuration-Developer
- Resource Image:** Includes an 'Upload Image' button.
- Info:** Calendar: Standard, Quantity: 1, Timesheet Hours Per Week: 40, Reimburse Currency: (empty).
- Employment Dates:** Start: (empty), End: (empty).
- Resource Attributes:** Effective Date: 1/7/2019. Includes an 'Apply' button and a 'History' link. The 'Attributes' table shows:
 

Resource Types	Associate (Employee)
Resource Role	<input checked="" type="checkbox"/> (Primary selection) <input checked="" type="checkbox"/> 1. Developer
Location	Santo Amaro
Vendor	(empty)
Region	Americas
Country	Brazil
Associate (Employee) ID	119055
CC	BR51301059

A yellow arrow points to the 'Associate (Employee)' role in the Resource Attributes section.

Figure PNP26. Resource View upper data blocks (partial screen capture only).

This screenshot is identical to the one above, showing the 'Resource View' page for 'Afzan Mohd Salud'. It displays the same sections: Resource Structure, Associated User, Organizational Resource, Resource Image, Info, Employment Dates, and Resource Attributes. The Resource Attributes table is also visible, showing the selected roles and other details.

Figure PNP27. Resource View- Resource Attributes section (partial modified horizontally compressed screen capture- the actual Planview screen is wider).

Resource Attributes		Effective Date	12/5/2018	Apply	History
Attributes <span style="float: right;">Update</span>					
Resource Types	Associate (Employee)				
Resource Role	✓ (Primary selection) ✓ 1. Developer <span style="float: right;">Default</span>				
Location	Santo Amaro				
Vendor					
Region	Americas				
Country	Brazil				
Associate (Employee) ID	119055				
CC	BR51301059				

**NOTE:** The **Resource Structure**, **Associated User**, and **Organizational Resource** data blocks are prefilled and not editable in this dialog box.

## 6.2. Resource Image

- 6.2.1. Click [Upload Image](#) next to **Resource Image** to associate a picture with the resource. See figure PNP28.

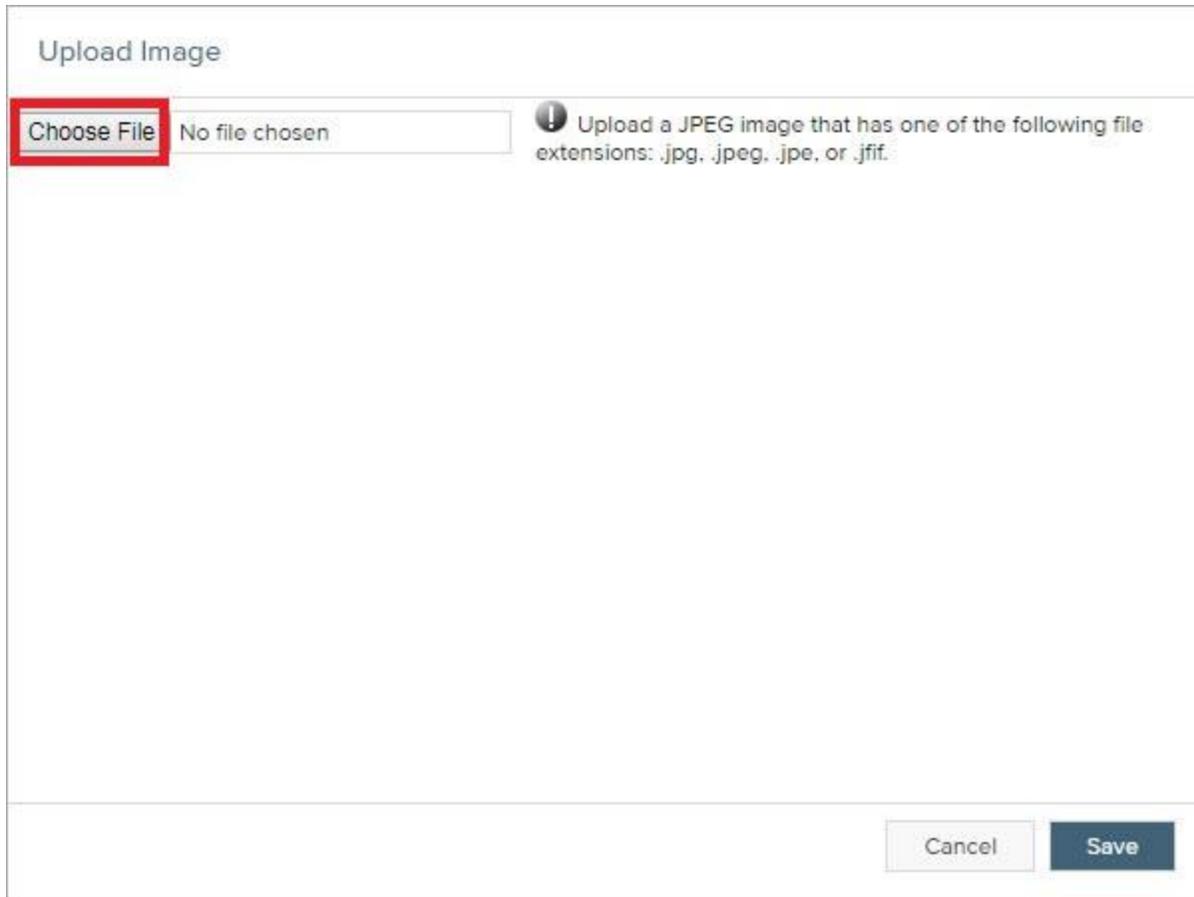
Figure PNP28. Upload Image link (partial screen capture only).

Resource Image		Upload Image
Info <span style="float: right;">Update</span>		
Calendar:	Standard	
Quantity:	1	
Timesheet Hours Per Week:	40	
Reimburse Currency:		
Employment Dates <span style="float: right;">Update</span>		
Start:		
End:		
<a href="#">Comments</a>		

- 6.2.2. The **Planview Upload Image** dialog dox is displayed.

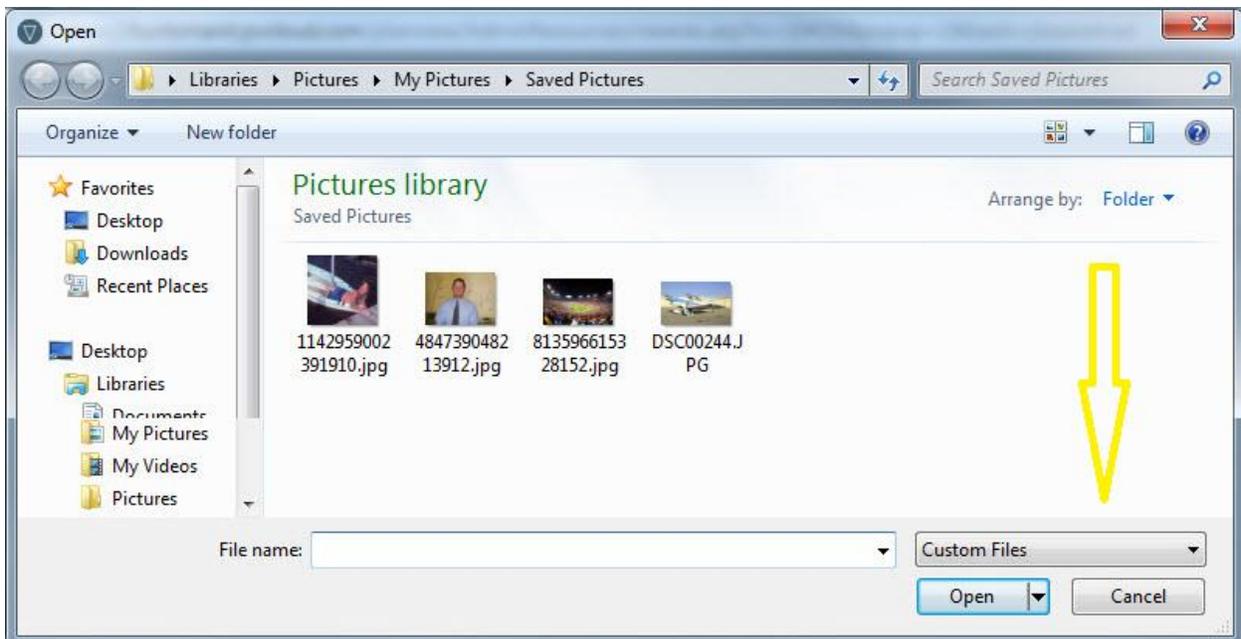
- 6.2.3. Click [Choose file](#) in the **Planview Upload Image** dialog box. See figure PNP29.

Figure PNP29. Planview Upload Image dialog box with Choose File highlighted (partial screen capture of this dialog box only)



6.2.4. The **Windows Open** dialog box is displayed. See figure PNP30.

Figure PNP30. Windows Open dialog box (modified vertically compressed screen capture- the actual Windows Open dialog defaults to a taller user interface).



6.2.5. Select the (image file to be uploaded).

*NOTE: Only JPEG files (.jpg, .jpeg, .jpe, or .jfif) file extensions can be uploaded to Planview.*

6.2.6. After selecting the file from the local PC, double click the image file icon to upload the file to Planview.

6.2.7. The picture is displayed in the **Planview Upload Image** dialog box. See figure PNP31.

Figure PNP31. Chosen picture displayed in Planview Upload Image dialog box for manipulation (partial screen capture of this dialog box only).



6.2.8. Place the cursor over the image and drag the corners to crop it or change its formatting.

6.2.9. When manipulation of the image is complete, click Save in the **Planview Upload Image** dialog box to upload the image. See figure PNP32.

Figure PNP32. Planview Upload Image dialog box with Save highlighted (partial screen capture of this dialog box only).



6.2.10. After **Save** is clicked in the Planview **Upload Image** dialog box the uploaded image appears in the **Resource Image** data block. See figure PNP33.

Figure PNP33. Resource Image dialog box (partial screen capture only).

Resource Image
Upload Image [\(remove\)](#)



**Info**
Update

Calendar:	Standard
Quantity:	1
Timesheet Hours Per Week:	40
Reimburse Currency:	

**Employment Dates**
Update

Start:	
End:	

[Comments](#)

### 6.3. Info

6.3.1. Click Update next to **Info** in the **Info** data block. See figure PNP34.

Figure34. Update highlighted in the Info data block (partial screen capture only).

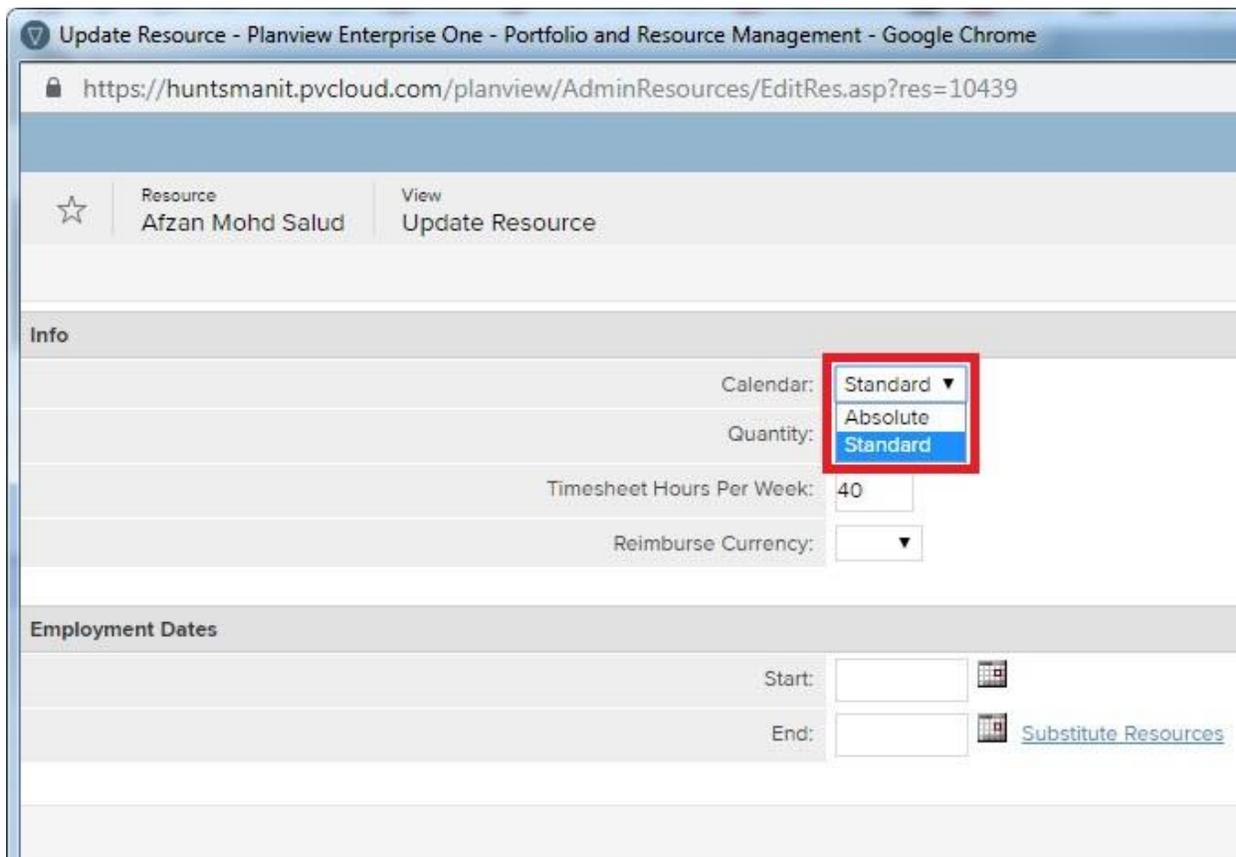
6.3.2. The **Update Resource** dialog box is displayed. See figure PNP35.

Figure PNP35. Update Resource dialog box (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).

6.3.3. Select a **Calendar** parameter by clicking the down caret next to the **Calendar** data selection field under **Info** and clicking (the calendar parameter used for the resource) from the options listed in the dropdown menu to select it. See figure PNP36.

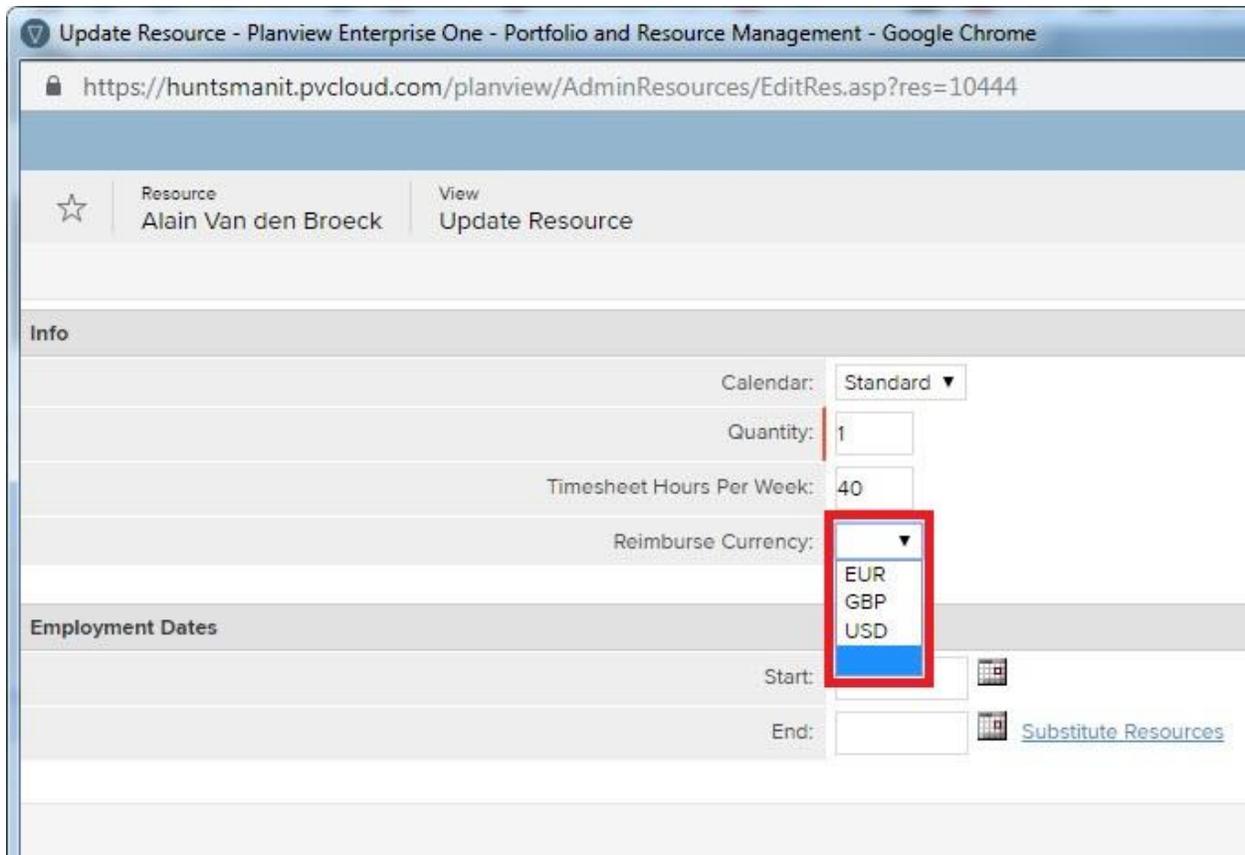
NOTE:

Figure PNP36. Calendar selection options (partial screen capture only).



- 6.3.4. Click in the Quantity data entry field to change the default setting if necessary.
- 6.3.5. Click in the Timesheet Hours Per Week data entry field to change the default setting if necessary.
- 6.3.6. Select a **Reimburse Currency** parameter by clicking the down caret next to the **Reimburse Currency** data selection field and clicking (the currency used to reimburse the resource) from the options listed in the dropdown menu to select it.  
See figure PNP37.

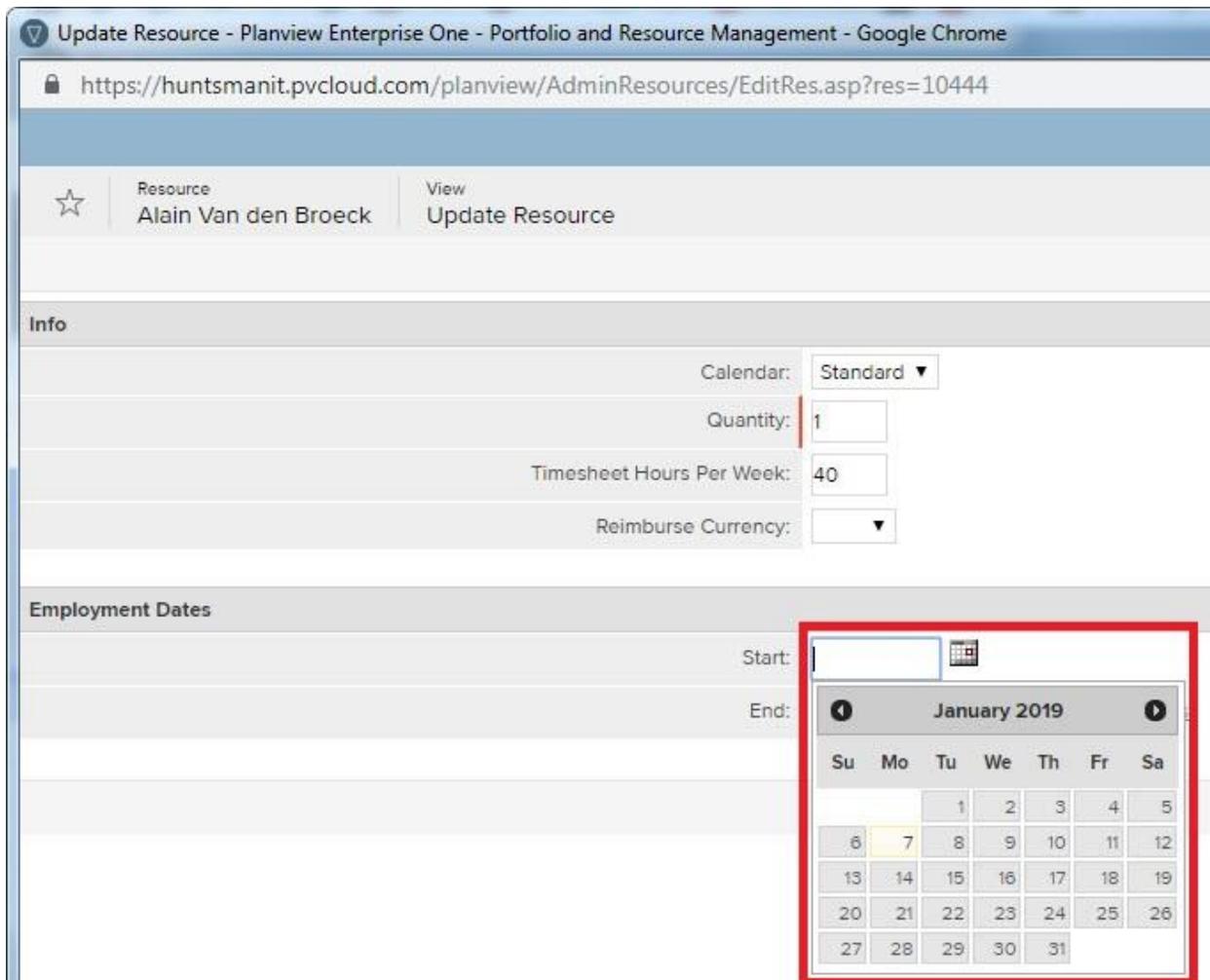
Figure PNP37. Reimburse Currency selection options (partial screen capture only).



#### 6.4. Employment Dates

- 6.4.1. Click the Calendar launch icon next to the **Employment Dates – Start:** data selection field to select a start date for the resource.
- 6.4.2. Click the Calendar launch icon next to the **Employment Dates – End:** data selection field to select an end date for the resource. See figure PNP38.

Figure PNP38. Calendar date selection tool open for Employment Start Date (partial screen capture only).



6.4.3. Click the [Comments hyperlink](#) to enter any comments for the changes being made.

See figure PNP39.

Figure PNP39. Comments hyperlink highlighted (partial screen capture only).

Resource Image		Upload Image
Info		Update
Calendar:	Standard	
Quantity:	1	
Timesheet Hours Per Week:	40	
Reimburse Currency:		
Employment Dates		Update
Start:		
End:		
<a href="#">Comments</a>		

6.4.4. The **Resource Comments for Resource (Name)** dialog box is displayed. See figure PNP40.

Figure PNP40. Resource Comments for Resource (Name) dialog box (partial screen capture only).

Comments - Planview Enterprise One - Portfolio and Resource Management - Google Chrome

https://huntsmanit.pvcloud.com/planview/AdminResources/EditComments.asp?res=10439

Resource Comments for Resource: Afzan Mohd Salud

Existing comments

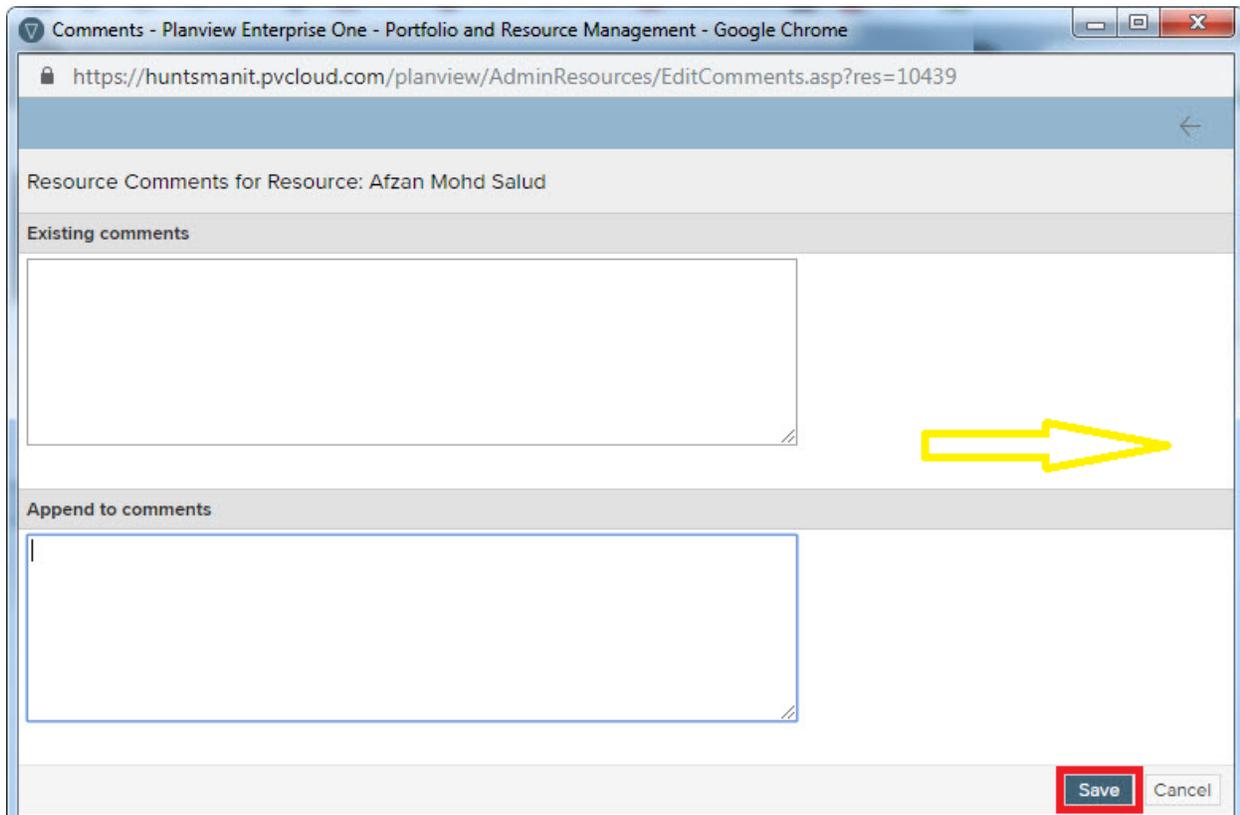
Append to comments

6.4.5. Click in the **Append to comments** dialog box to enter the comments.

*NOTE: Any previously entered comments will appear in the Existing Comments data field.*

6.4.6. When comments are complete click **Save** on the right side of the **Resource Comments for Resource (Name)** dialog box. See figure PNP41.

Figure PNP41. Save highlighted in the Resource Comments for Resource (Name) dialog box (partial screen capture only).



6.4.7. Verify all data entered and selected is correct and complete.

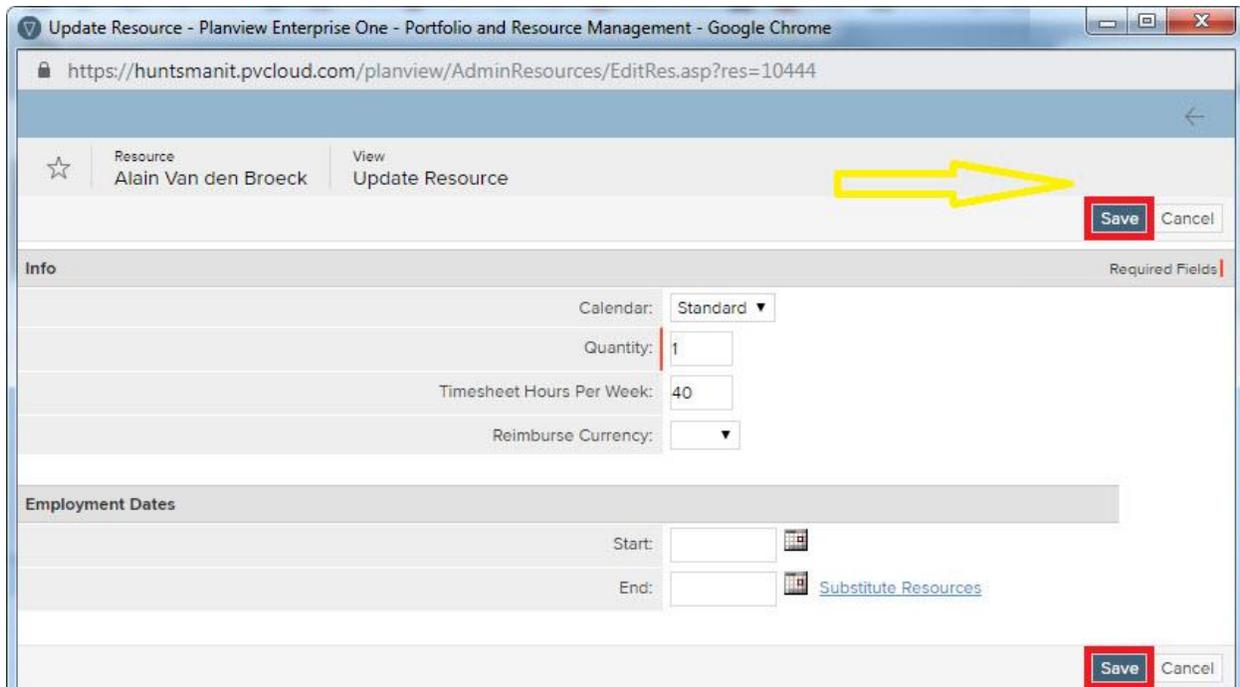
6.4.8. After verification click **Save** on the right side of the **Update Resource** dialog box.

See figure PNP42.

*NOTE: Either of the two (2) **Save** buttons in the **Update Resource** dialog box can be clicked.*

See figure PNP42.

Figure PNP42. Save buttons in the Update Resource dialog box (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).

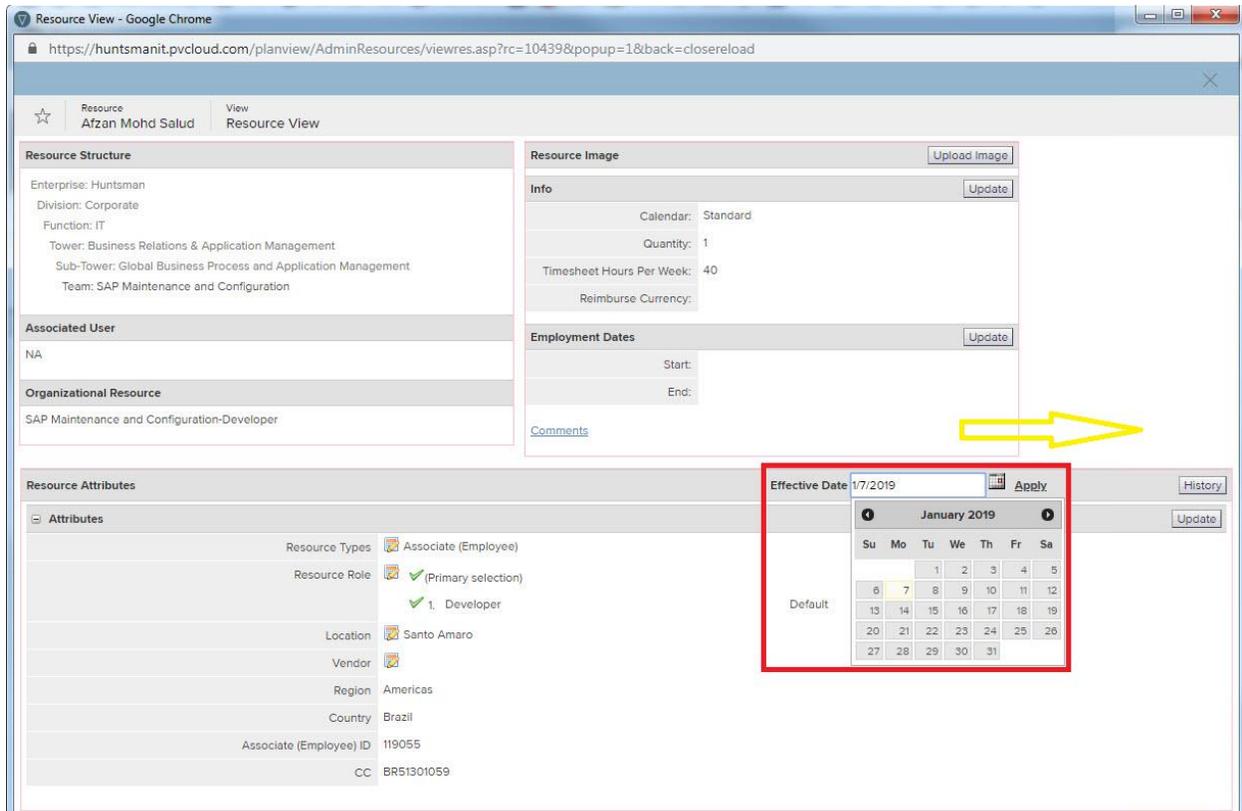


## 6.5. Resource Attributes

*NOTE: The Resource Attribute parameters are critically important for both project tracking and system maintenance. If at any time during the project lifecycle the status of Resources assigned to the Project change those changes must be reflected here as soon as possible.*

- 6.5.1. Click the Calendar launch icon next to **Effective Date** in the **Resource Attributes** data block to select an (Effective Date for any changes being made) to the Resource Attributes. See figure PNP43.

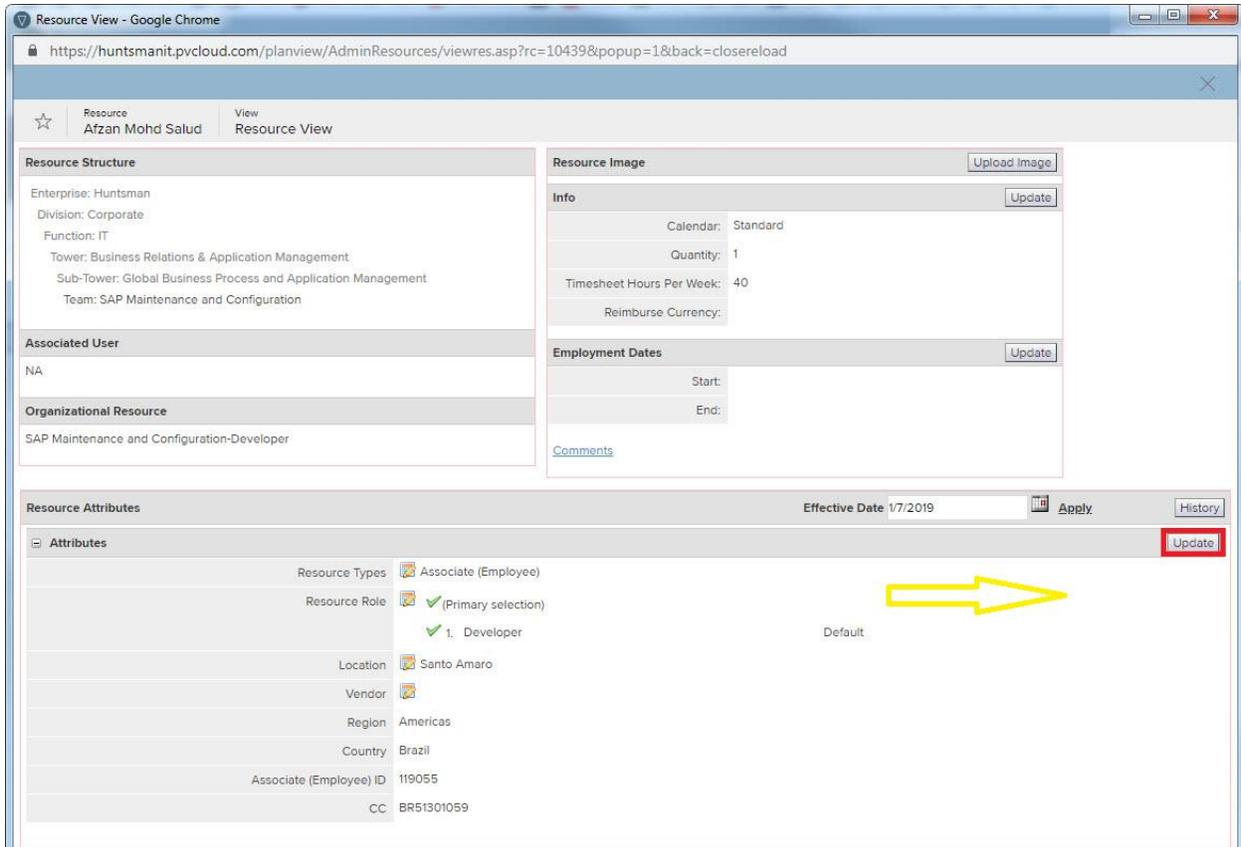
Figure PNP43. Effective Date calendar date selection tool (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).



6.5.2. After the **Effective Date** has been selected in the Calendar selection tool click the [Apply hyperlink](#) next to the **Effective Date** data selection field to apply the Effective Date change.

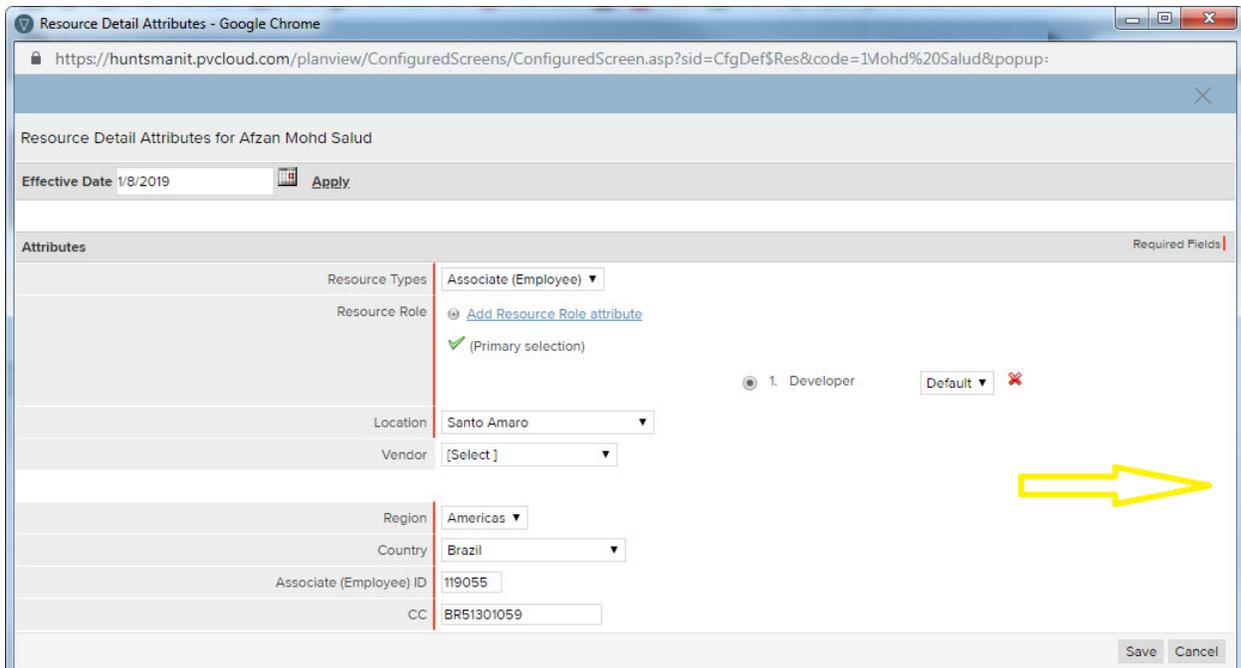
6.5.3. Click [Update](#) (under History) on the extreme right side of the **Resource Attributes** data block. See figure PNP44.

Figure PNP44. Update highlighted in the Resource Attributes data section (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).



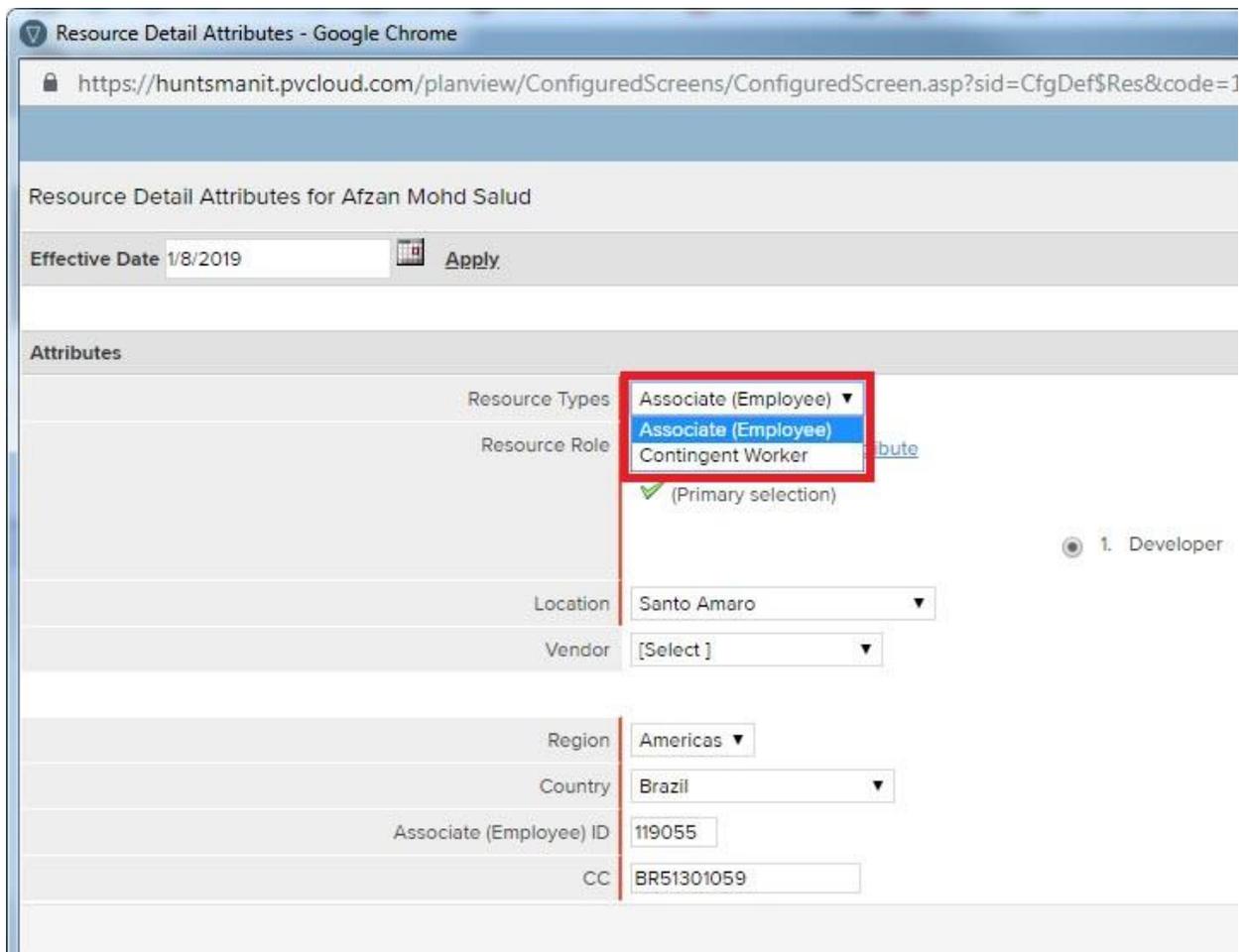
6.5.4. The **Resource Detail Attributes for (Name)** dialog box is displayed. See figure PNP45.

Figure PNP45. Resource Detail Attributes for (Name) dialog box (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).



6.5.5. Select a **Resource Types** parameter by clicking the down caret next to the **Resource Types** data selection field and clicking (the appropriate resource type parameter for the resource) from the options listed in the dropdown menu to select it. See figure PNP46.

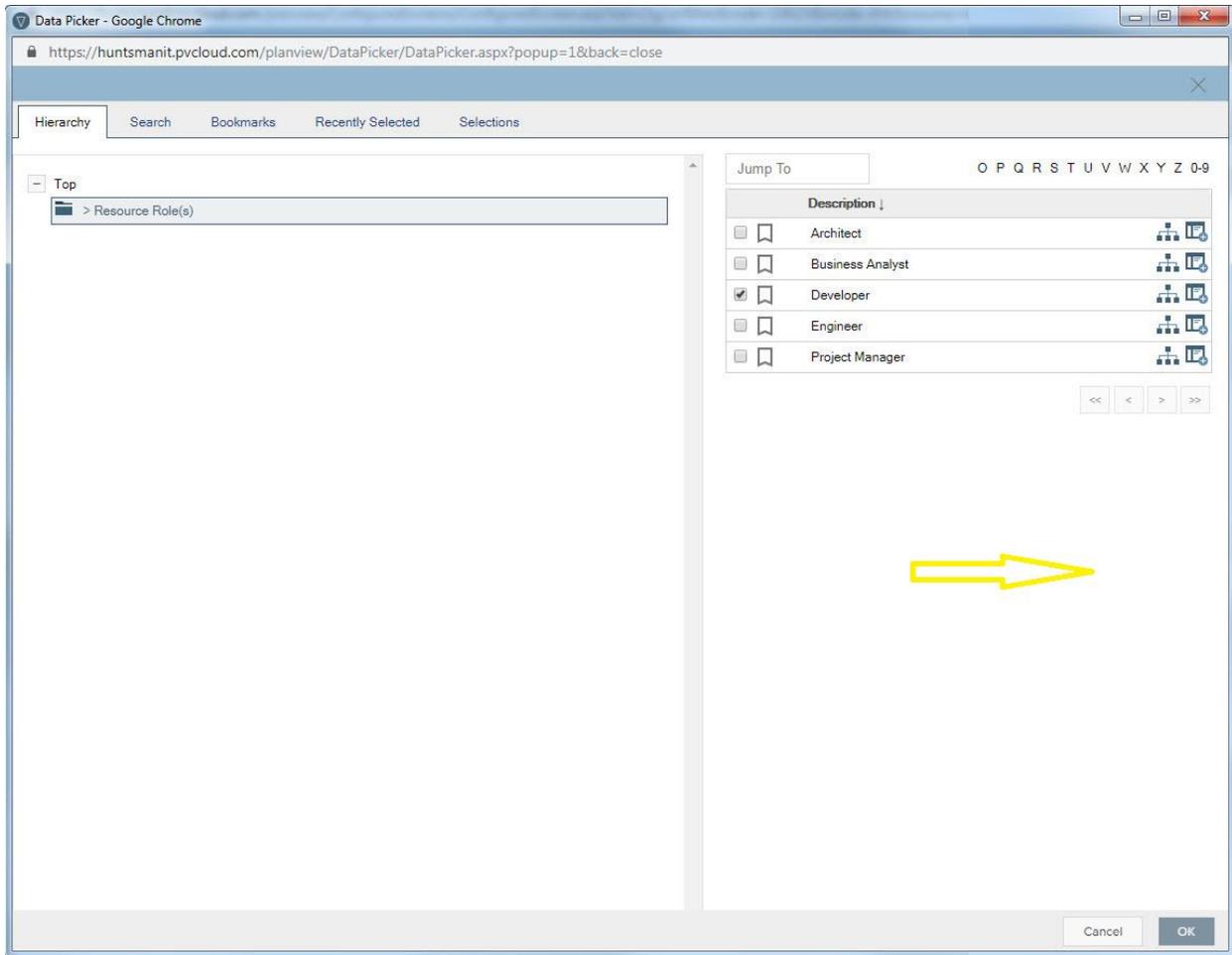
Figure PNP46. Resource Types selection options (partial screen capture only).



6.5.6. Click the [Add Resource Role attribute hyperlink](#) next to **Resource Role** to add a second resource role (or) modify the displayed resource role.

6.5.7. The **Resource Role Data Picker dialog box** is displayed. See figure PNP47.

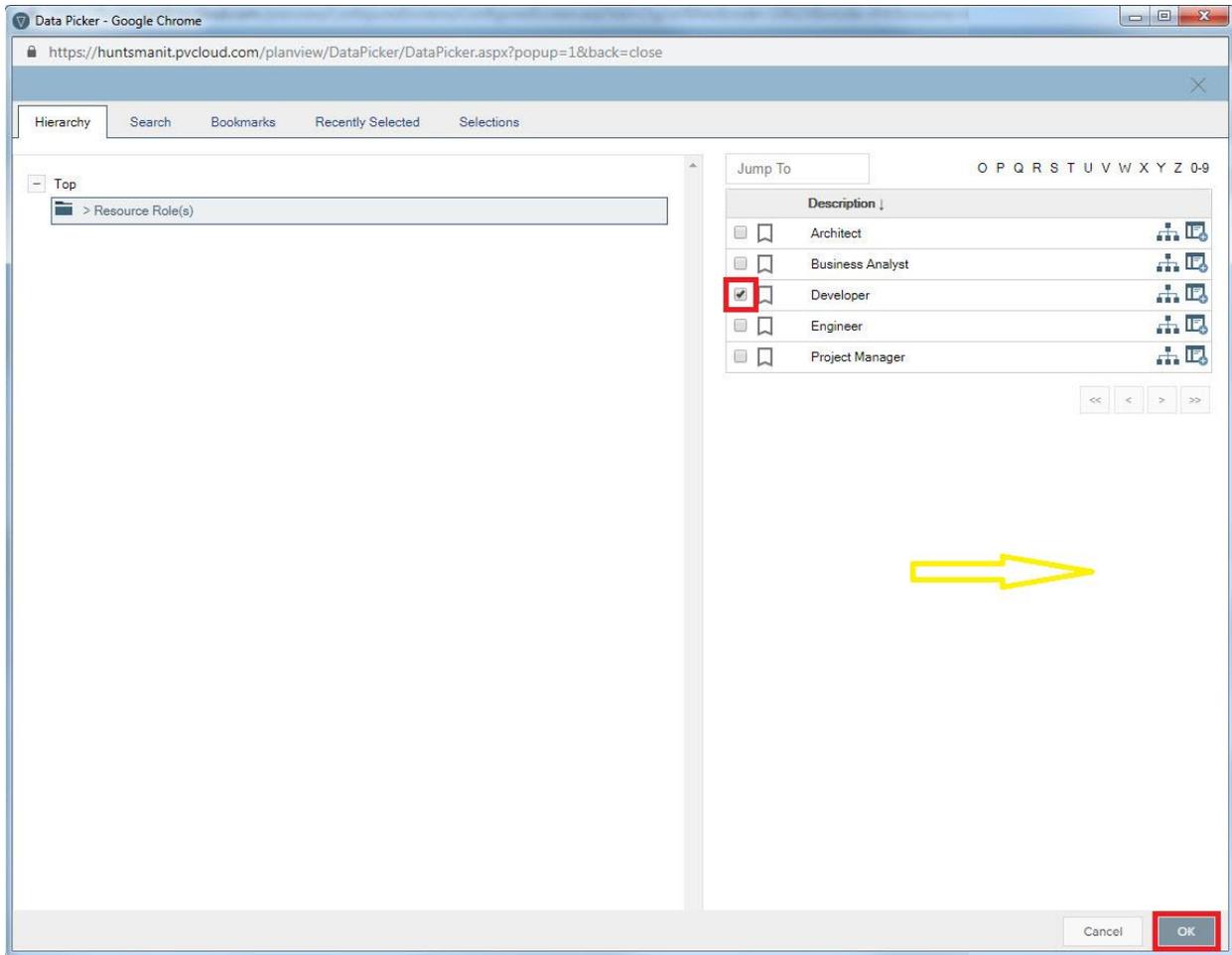
Figure PNP47. Resource Role data picker dialog box (modified horizontally compressed screen capture- the actual Planview screen is wider).



6.5.8. Click the checkbox to the immediate left of the desired additional (or) modified role.

6.5.9. When **Resource Roles** selections are complete, click OK in the lower right portion of the **Data Picker dialog box** to save the Resource Role information. See figure PNP48.

Figure PNP48. Resource Role data picker dialog box with checkbox and OK highlighted (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).



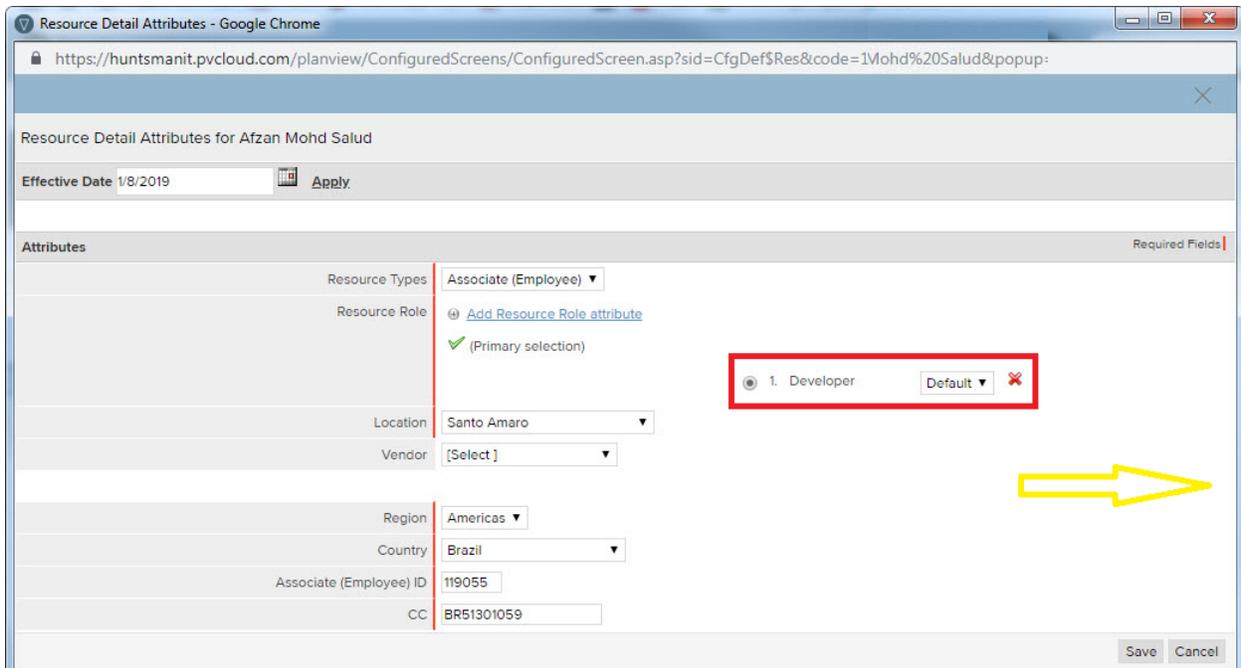
6.5.10. The Resource Role information appears in the **Resource Detail Attributes for (name)** dialog box.

6.5.11. Click the radio button next to the default **Resource Role** (if another Resource Role was added).

6.5.12. Click the red X next to (any listed role) to remove it from the list of Resource Roles.

See figure PNP49.

Figure PNP49. Resource Role data block (partial screen capture only- modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).



6.5.13. Select a **Location** parameter by clicking the down caret next to the **Location** data selection field and clicking (the location in which the resource works) from the options listed in the dropdown menu to select it. See figures PNP50 and PNP51.

Figure PNP50. Location selection dropdown menu (partial screen capture only).

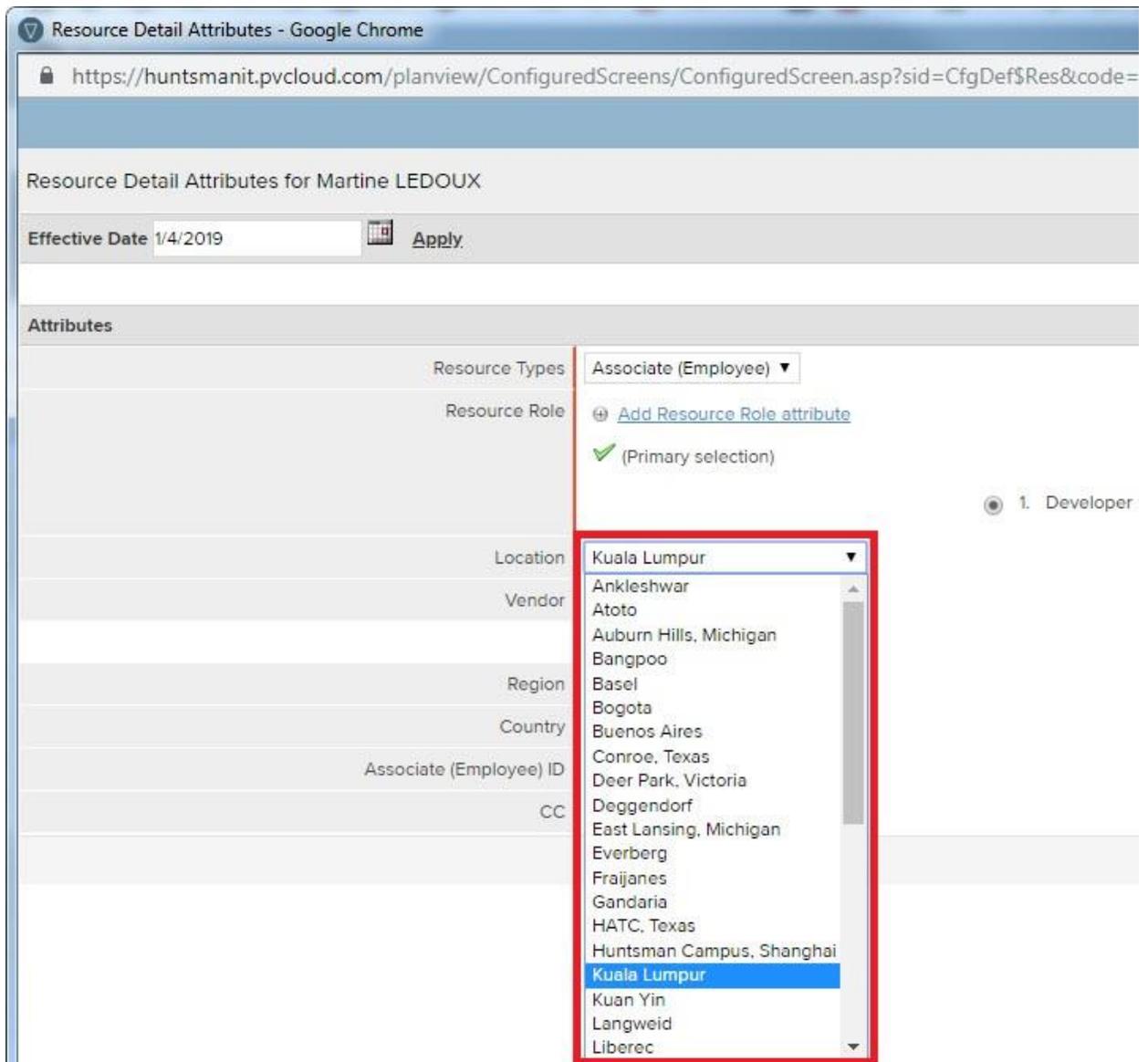
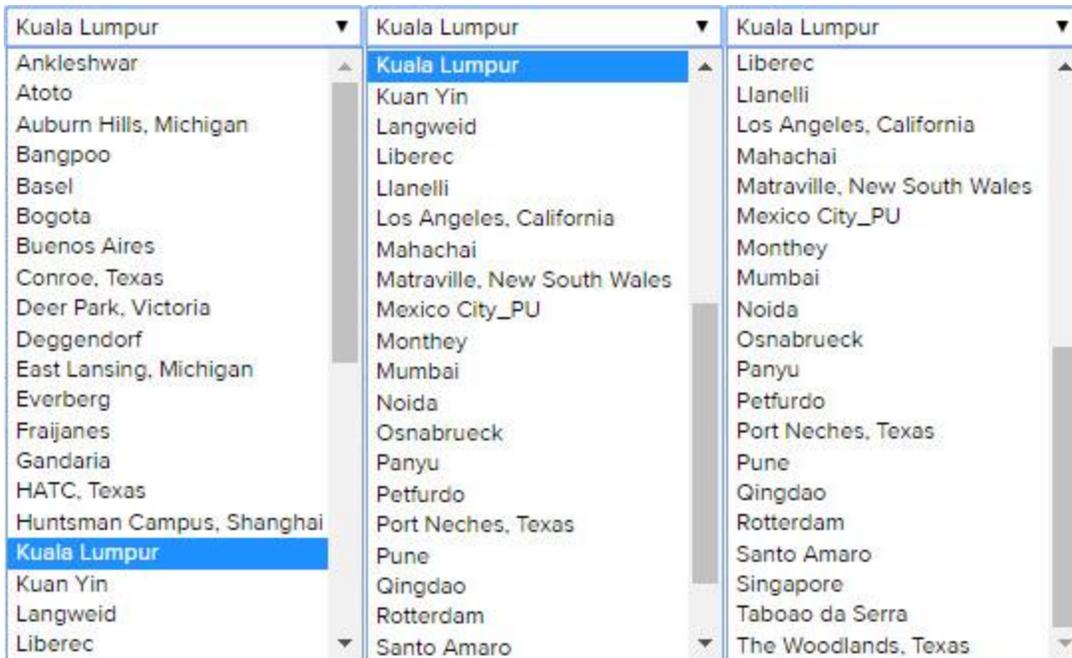


Figure PNP51. Location selection options (dropdown menu screen capture only).

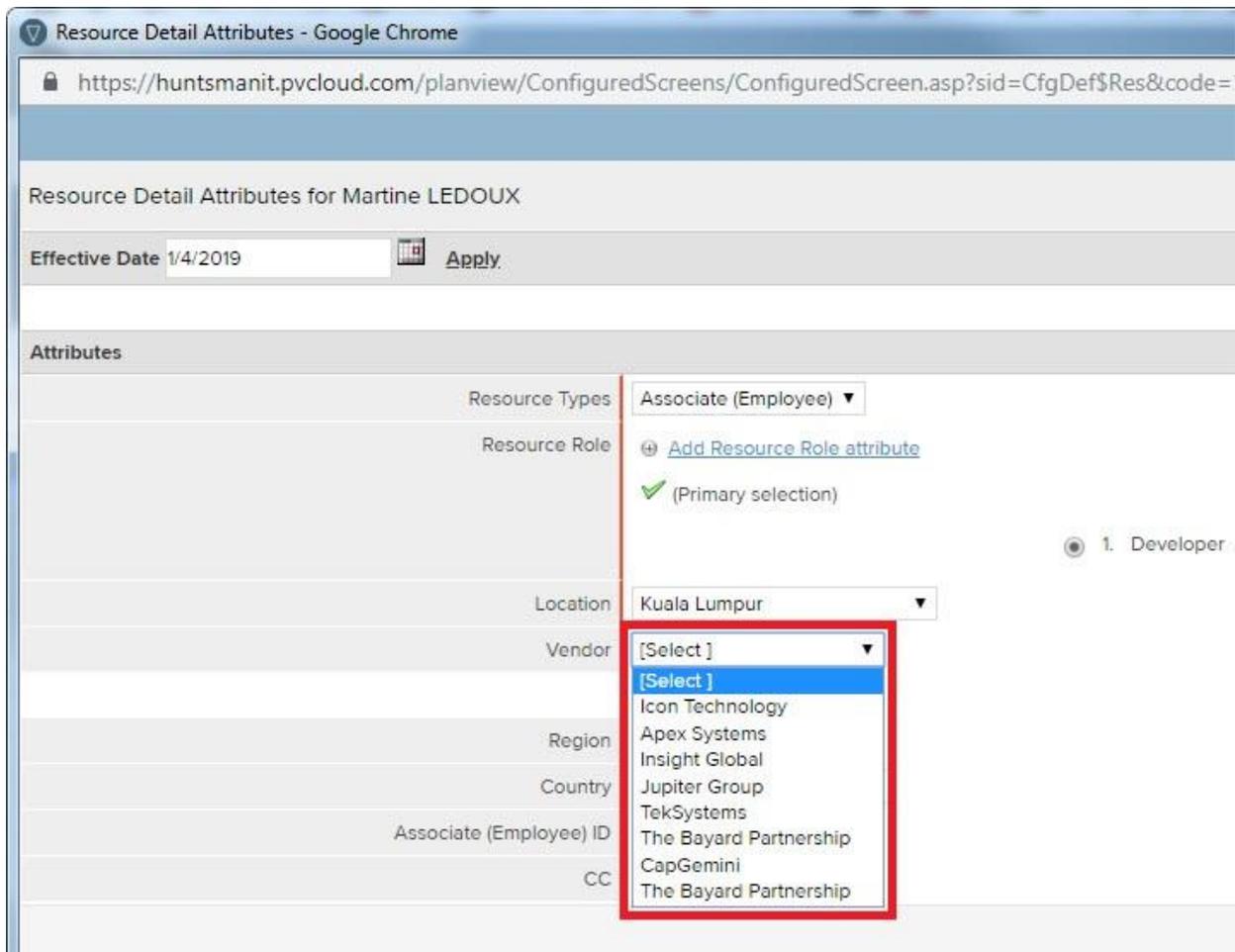


6.5.14. Select a **Vendor** parameter by clicking the down caret next to the **Vendor** data selection field and clicking (the Vendor (or agency) for which the resource works) from the options listed in the dropdown menu to select it. See figure PNP52.

*NOTE: The Vendor parameter only applies to contingent workers (not Huntsman Associates).*

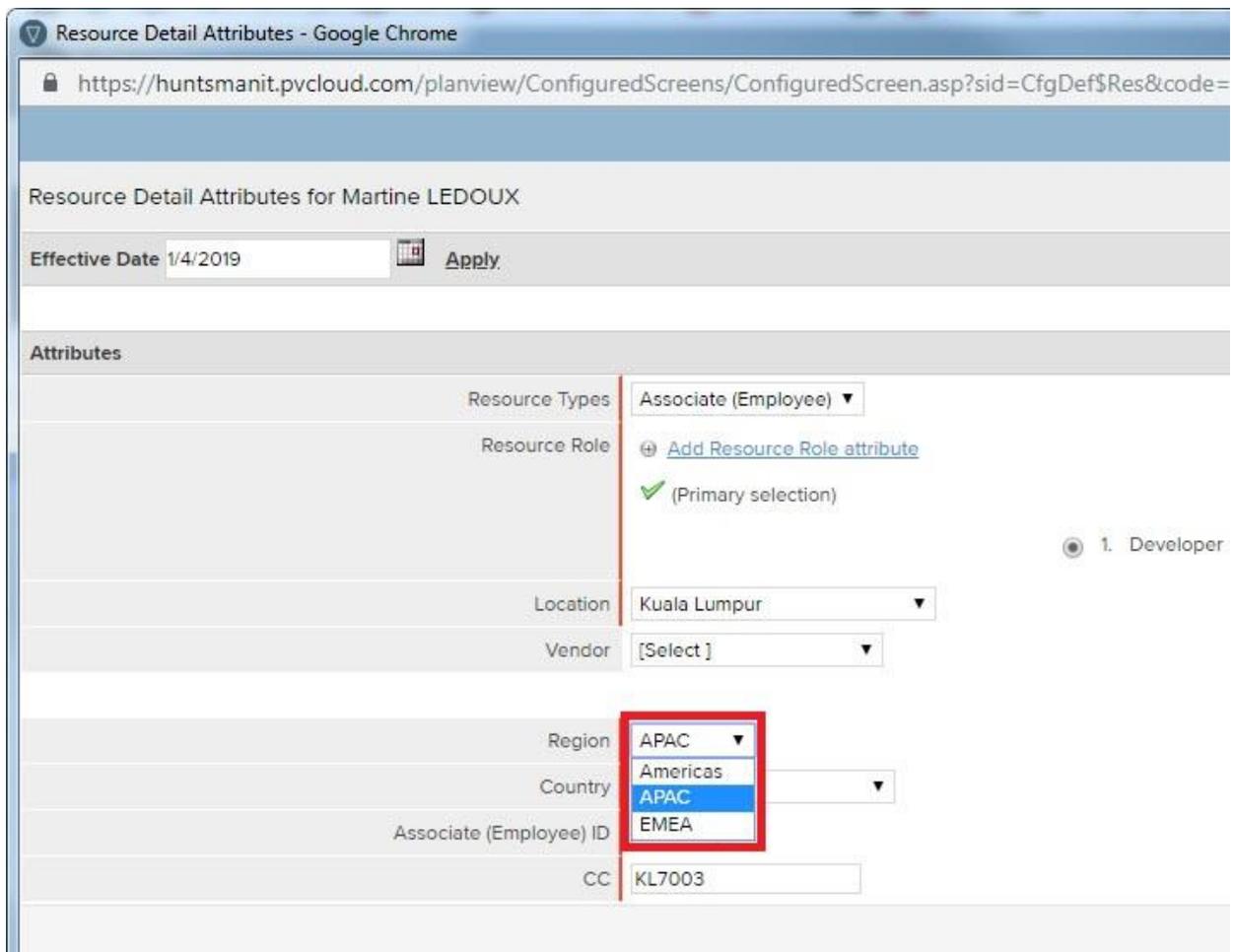
*NOTE: Additions or deletions of vendor data can be done via PMO.*

Figure PNP52. Vendor selection options (partial screen capture only).



6.5.15. Select a **Region** parameter by clicking the down caret next to the **Region** data selection field and clicking (the appropriate Region) from the options listed in the dropdown menu to select it. See figure PNP53.

Figure PNP53. Region selection options (partial screen capture only).



6.5.16. Select a **Country** parameter by clicking the down caret next to the **Country** data selection field and clicking (the appropriate Country) from the options listed in the dropdown menu to select it. See figures PNP54 and PNP55

Figure PNP54. Country selection dropdown menu (partial screen capture only).

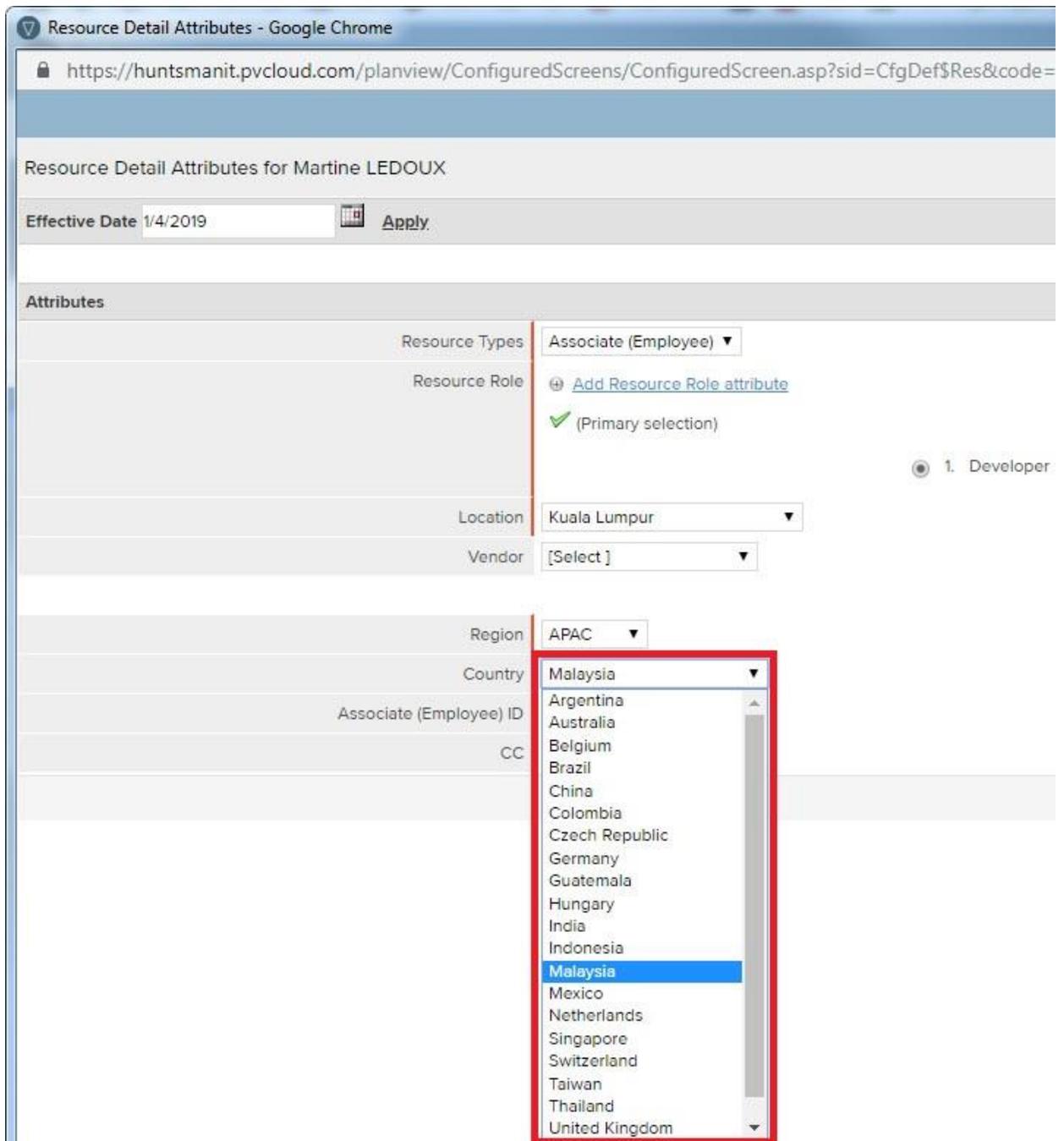


Figure PNP55. Country selection options (dropdown menu screen capture only).



6.5.17. The **Associate (Employee) ID** field is prefilled

*NOTE: This field should not be edited unless an error was discovered. This data does not change from one project to another.*

6.5.18. The **CC** field is prefilled)

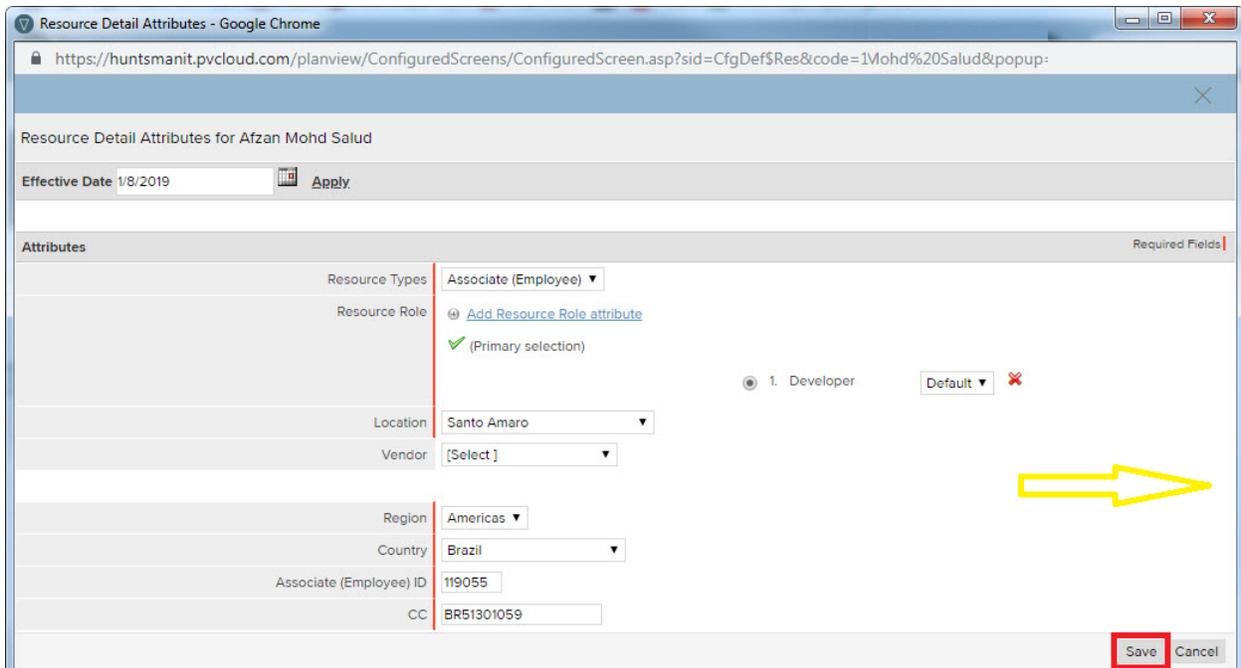
*NOTE: This field (Cost Center) should not be edited unless an error was discovered. This data does not usually change from one project to another.*

6.5.19. Verify all data entered and selected is complete and correct.

6.5.20. After verification, click **Save** on the extreme right side of the **Resource Detail**

**Attributes for (name)** dialog box. See figure PNP56.

Figure PNP56. Resource Detail Attributes for (Name) dialog box with Save highlighted (modified horizontally compressed screen capture- the actual Planview screen is wider and slightly taller).



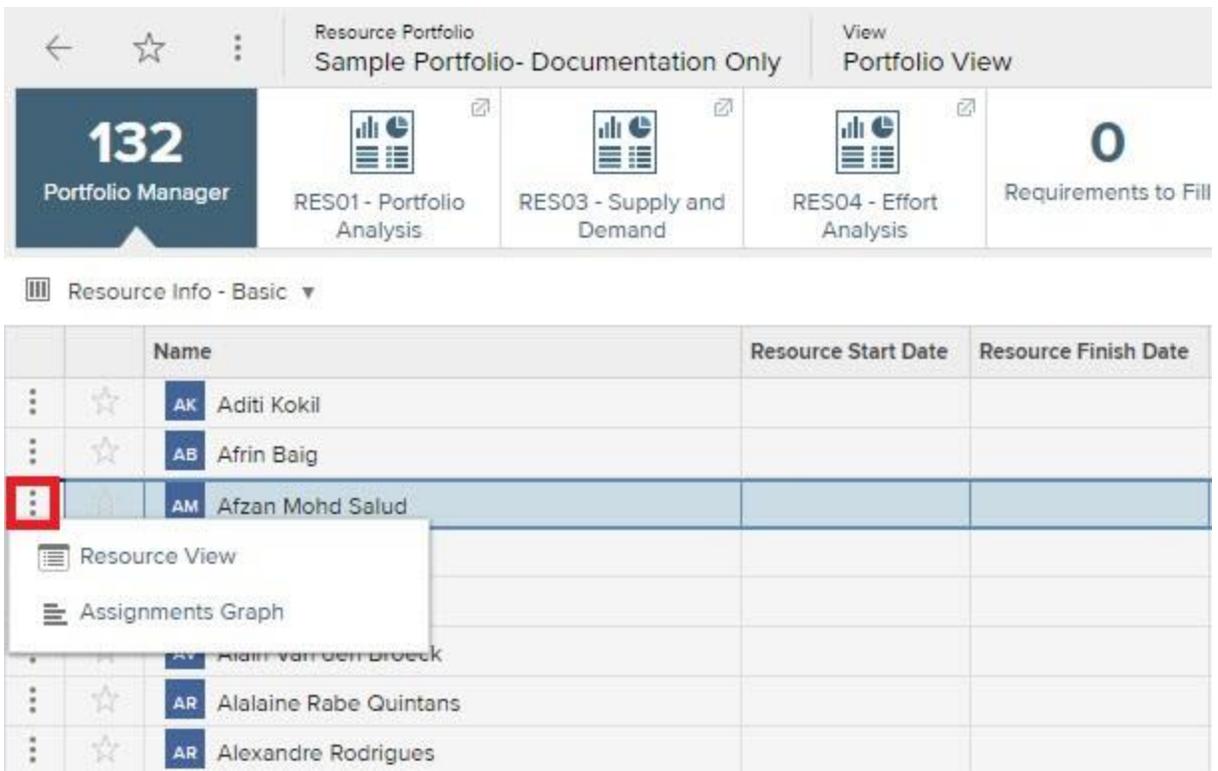
6.5.21. After the **Resource Detail Attributes for (name)** dialog box is closed the **Portfolio View** screen is displayed.

## 6.6. Assignments Graph

**NOTE: Assignments graph is not currently utilized because direct resources are not being assigned to projects at the time of this publication.**

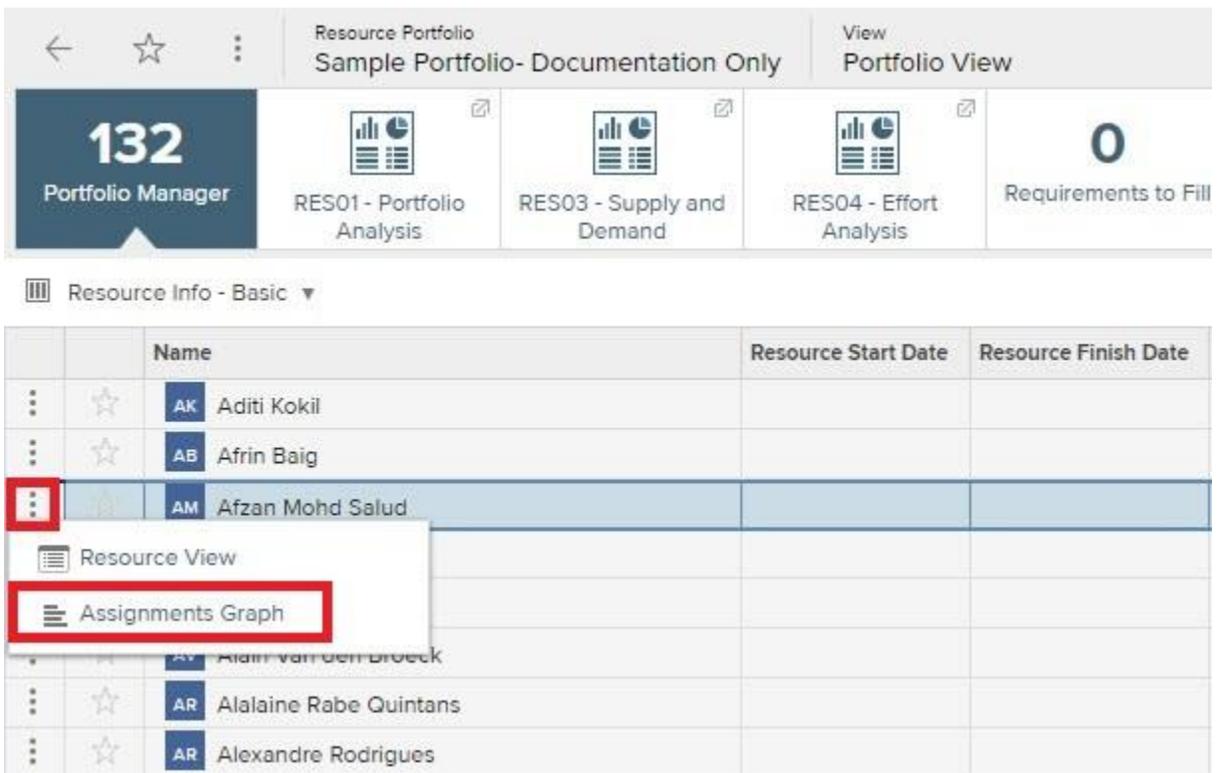
6.6.1. Click on the **Action menu** (the vertical ellipses or three dots) next to any listed resource to reveal the **Action menu** for that resource. See figure PNP57.

Figure PNP57. Portfolio View Action menu (partial screen capture only).



6.6.2. Click **Assignments Graph** in the **Action menu** to view the **Assignments Graph** for the selected resource See figure PNP58.

Figure PNP58. Action Menu- Assignments Graph (partial screen capture only).

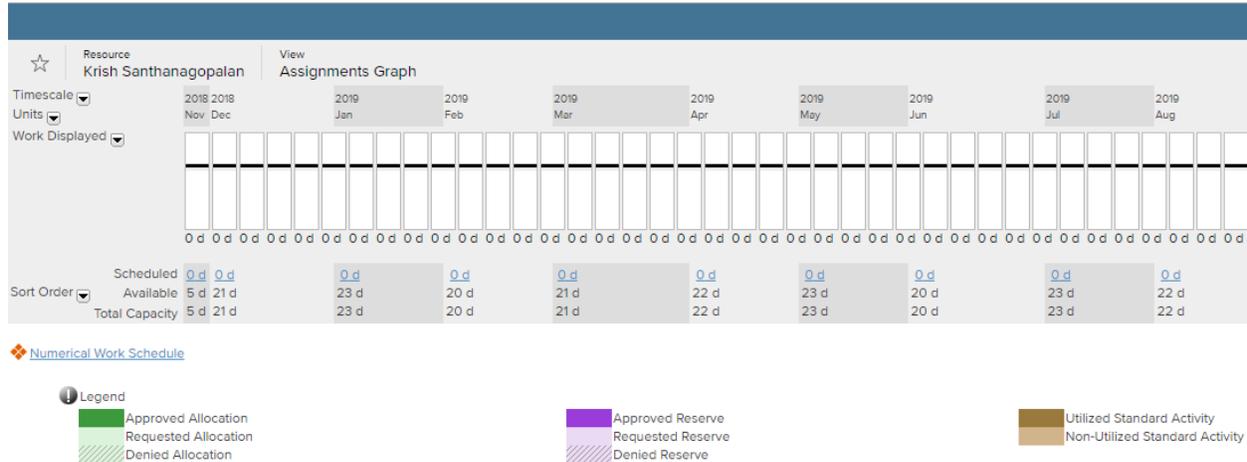


6.6.3. The **Assignments Graph** screen is displayed. See figure PNP59.

*NOTE: The Assignments Graph screen defaults to the Graphical Work Schedule view.*

*NOTE: A considerable amount of data is displayed in the Graphical Work Schedule screen but requires sideways scrolling to view it in total.*

Figure PNP59. Assignments Graph screen- Graphical Work Schedule (partial screen capture only- the actual Planview screen is wider and displays additional data when scrolling right).



### Graphical Work Schedule

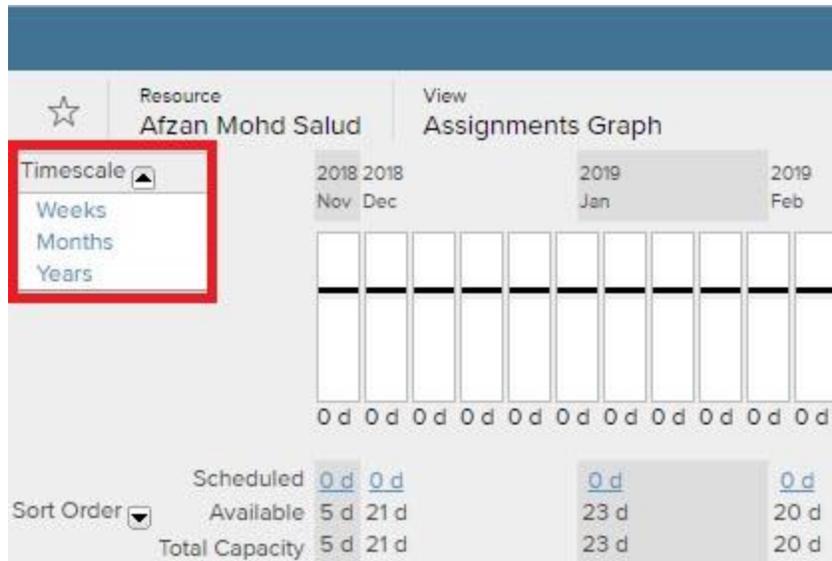
*NOTE: The Graphical Work Schedule displays all work items for the selected resource. It is divided into two sections, one showing the resource profile and the other showing the work items that make up that profile.*

*NOTE: The display period will start at Time Now unless Time Now occurs before the start of the earliest work item in which case the display period will start at the start date of the earliest work item.*

6.6.4. Select a **Timescale** setting for the **Graphical Work Schedule** by clicking the **down caret** next to **Timescale** and clicking (the appropriate timescale setting) from the listed options in the dropdown menu to select it. See figure PNP60.

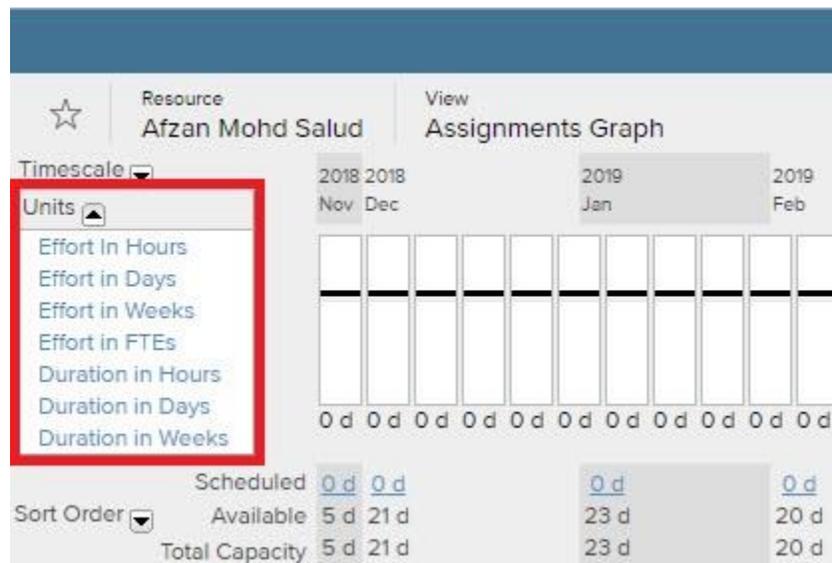
*NOTE: The display period is 5 years when using the year timescale; when using the month and week timescales the display period is 2 years.*

Figure PNP60. Timescale selection options in the Graphical Work Schedule screen (partial screen capture only).



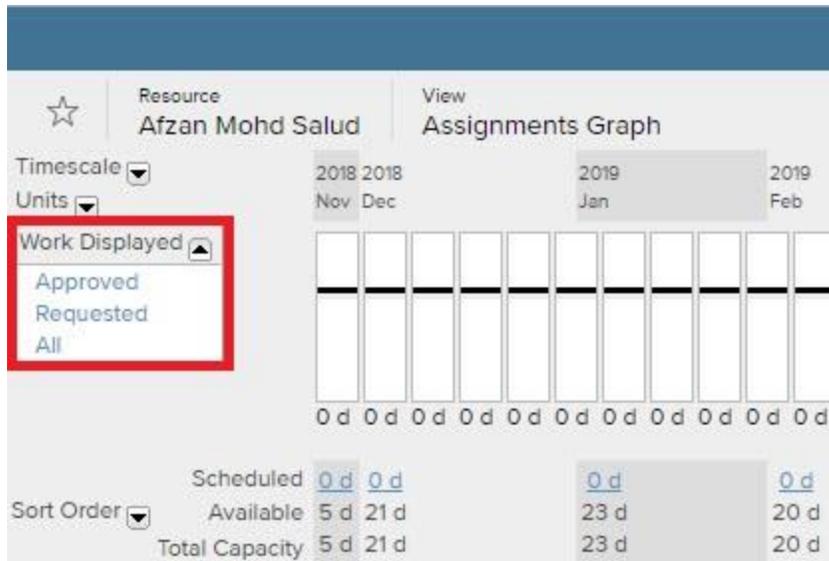
- 6.6.5. Select a **Units** setting for the **Graphical Work Schedule** by clicking the down caret next to **Units** and clicking (the appropriate units setting) from the listed options in the dropdown menu to select it. See figure PNP61.

Figure PNP61. Units selection options in the Graphical Work Schedule screen (partial screen capture only).



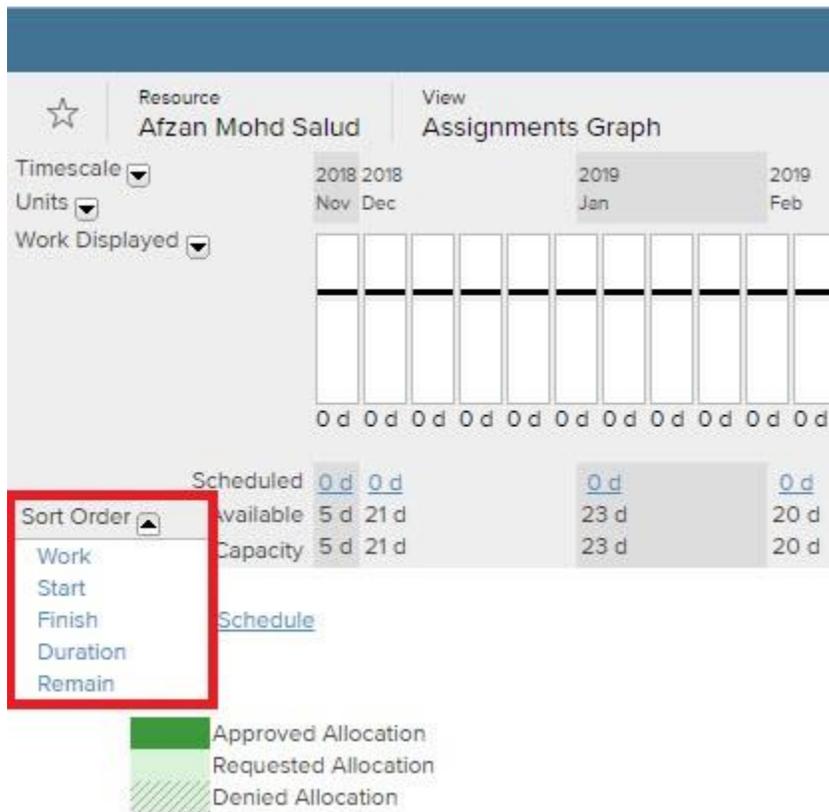
- 6.6.6. Select a **Work Displayed** setting for the **Graphical Work Schedule** by clicking the down caret next to **Work Displayed** and clicking (the appropriate Work Displayed setting) from the listed options in the dropdown menu to select it. See figure PNP62.

Figure PNP62. Work Displayed options in the Graphical Work Schedule screen (partial screen capture only).



6.6.7. Select a **Sort Order** setting for the **Graphical Work Schedule** by clicking the down caret next to **Sort Order** and clicking (the appropriate Sort Order setting) from the listed options in the dropdown menu to select it. See figure PNP63.

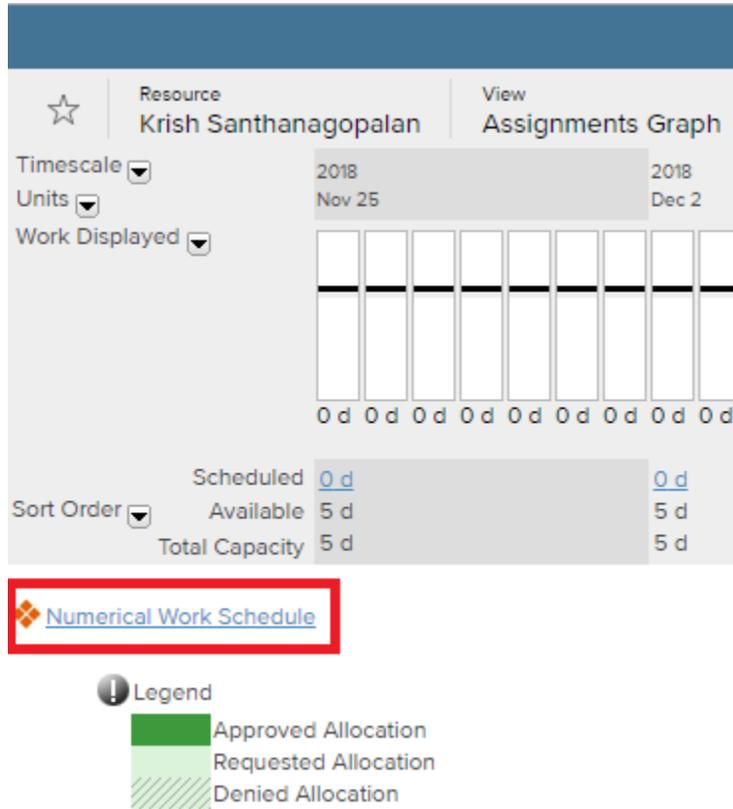
Figure PNP63. Sort Order options in the Graphical Work Schedule screen (partial screen capture only).



*NOTE: Profiles are displayed in red when the selected resource is over booked.*

6.6.8. Click the [Numerical Work Schedule hyperlink](#) to switch to the **Numerical Work Schedule** screen. See figure PNP64.

Figure PNP64. Numerical Work Schedule hyperlink (partial screen capture only).



6.6.9. The **Numerical Work Schedule** screen is displayed. See figure PNP65.

Figure PNP65. Numerical Work Schedule screen (partial screen capture only- the actual Planview screen is considerably wider).

Resource Summary for Krish Santhanagopalan

		2018 Nov	2018 Dec	2019 Jan	2019 Feb	2019 Mar	2019 Apr	2019 May	2019 Jun	2019 Jul	2019 Aug	2019 Sep	2019 Oct
Resource: <a href="#">Krish Santhanagopalan</a>	Sched.	0 d	0 d	0 d	0 d	0 d	0 d	0 d	0 d	0 d	0 d	0 d	0 d
1 FTE	Avail.	5 d	21 d	23 d	20 d	21 d	22 d	23 d	20 d	23 d	22 d	21 d	23 d
	Total Cap.	5 d	21 d	23 d	20 d	21 d	22 d	23 d	20 d	23 d	22 d	21 d	23 d

## Numerical Work Schedule

This screen shows all work to which the resources in your portal are scheduled. The resource name link displays the profile view for that resource. The work description link displays the

assignment detail screen and the dropdown menu next to it opens other informational screens about the work and provides access for updating the assignment when applicable. The effort link displays the work details for a time period. The dropdown menus at the top left corner of the screen allow you to change the timescale shown, the units used for the display of effort and whether to display scheduled work, requested work or both. The display period will start at Time Now unless Time Now occurs before the start of the earliest work item in which case the display period will start at the start date of the earliest work item. The display period will be 5 years for the year timescale and 2 years for the month and week timescales.

6.6.10. Select a **Timescale** setting for the **Numerical Work Schedule** by clicking the down caret next to **Timescale** and clicking (the appropriate timescale setting) from the listed options in the dropdown menu to select it. See figure PNP66.

Figure PNP66. Timescale options in the Numerical Work Schedule screen (partial screen capture only).

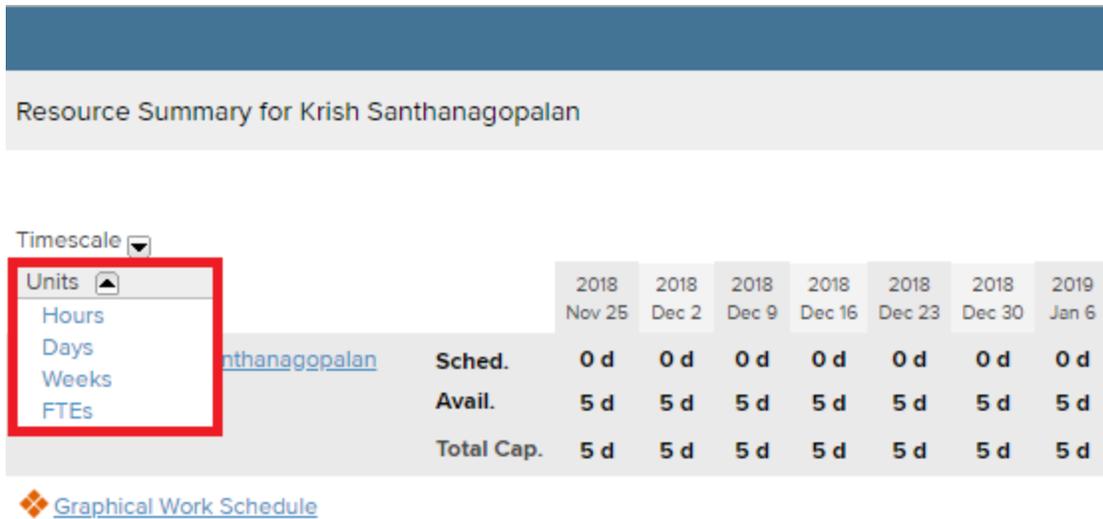
Resource Summary for Krish Santhanagopalan

		2018 Nov 25	2018 Dec 2	2018 Dec 9	2018 Dec 16	2018 Dec 23	2018 Dec 30	2019 Jan 6
1 FTE	<b>Sched.</b>	0 d	0 d	0 d	0 d	0 d	0 d	0 d
	<b>Avail.</b>	5 d	5 d	5 d	5 d	5 d	5 d	5 d
	<b>Total Cap.</b>	5 d	5 d	5 d	5 d	5 d	5 d	5 d

[Graphical Work Schedule](#)

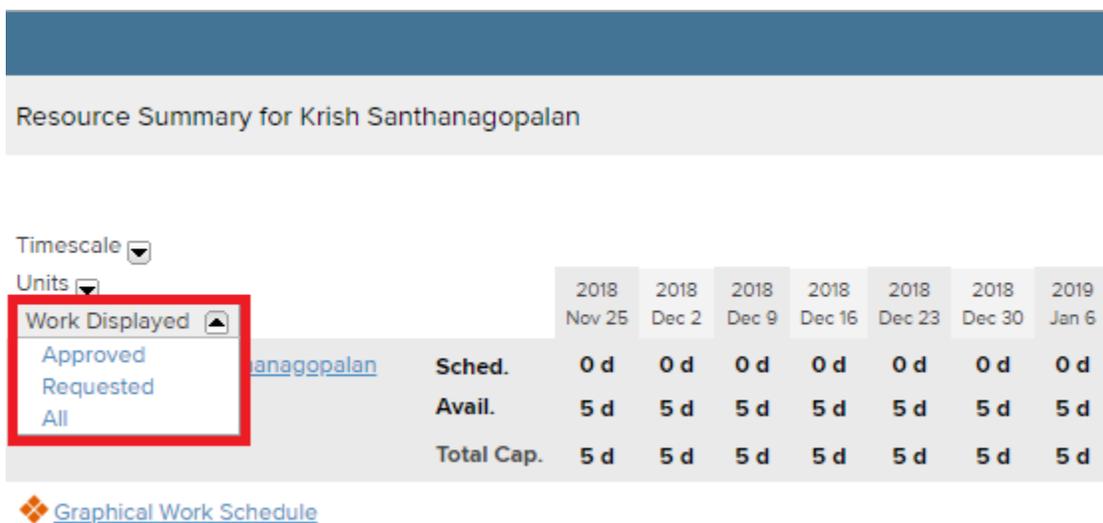
6.6.11. Select a **Units** setting for the **Numerical Work Schedule** by clicking the down caret next to **Units** and clicking (the appropriate units setting) from the listed options in the dropdown menu to select it. See figure PNP67.

Figure PNP67. Units options in the Numerical Work Schedule screen (partial screen capture only).



6.6.12. Select a **Work Displayed** setting for the **Numerical Work Schedule** by clicking the down caret next to **Work Displayed** and clicking (the appropriate Work Displayed setting) from the listed options in the dropdown menu to select it. See figure PNP68.

Figure PNP68. Work Displayed options in the Numerical Work Schedule screen (partial screen capture only).



6.6.13. Click the Graphical Work Schedule hyperlink to return to the **Graphical Work Schedule** screen. See figure PNP69.

Figure PNP69. Graphical Work Schedule hyperlink in the Numerical Work Schedule screen (partial screen capture only).

## Resource Summary for Krish Santhanagopalan

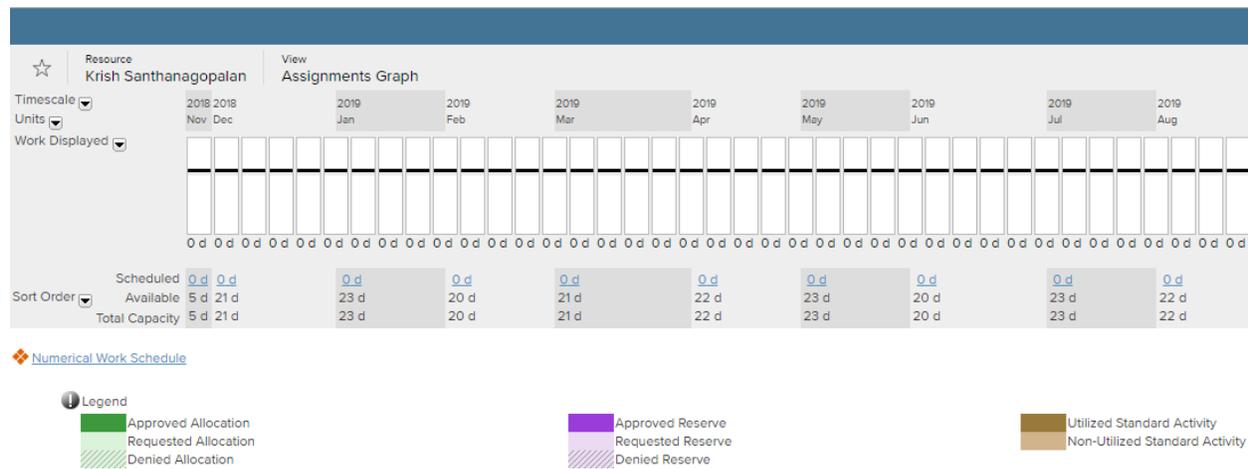
Timescale   
 Units   
 Work Displayed

		2018 Nov 25	2018 Dec 2	2018 Dec 9	2018 Dec 16	2018 Dec 23	2018 Dec 30	2019 Jan 6
Resource: <a href="#">Krish Santhanagopalan</a>	<b>Sched.</b>	0 d	0 d	0 d	0 d	0 d	0 d	0 d
1 FTE	<b>Avail.</b>	5 d	5 d	5 d	5 d	5 d	5 d	5 d
	<b>Total Cap.</b>	5 d	5 d	5 d	5 d	5 d	5 d	5 d

[Graphical Work Schedule](#)

6.6.14. The **Graphical Work Schedule** screen is displayed. See figure PNP70.

Figure PNP70. Graphical Work Schedule (partial screen capture only- the actual Planview screen is wider and displays additional data when scrolling right).



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