

# TECH TIP

## RESOURCE REQUEST AND FULFILLMENT ORACLE PRIMAVERA P6 EPPM

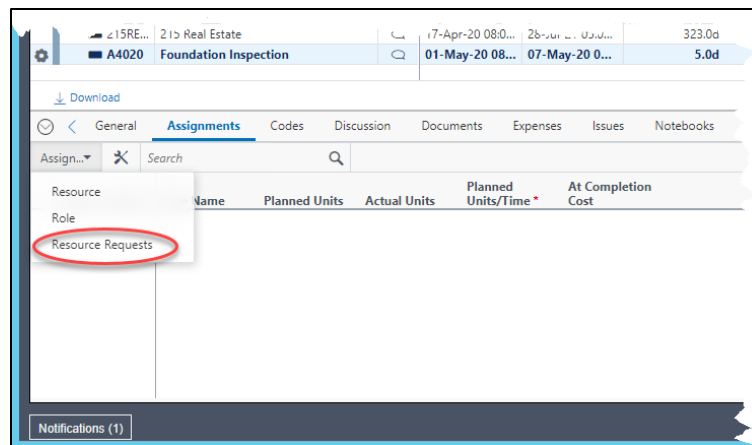
In a decentralized project environment, Resource Managers are responsible for allocating their team members to projects. The Resource Request feature in Primavera P6 allows Project Managers to request resources for Activities. These requests show on the Open Requests for Resource Dashboard portlet for the Resource Manager to assign.

The following steps show Requesting Resources and Filling Requests in the P6 EPPM application.

### Requesting Resources

To request a resource:

1. Select an activity on the Activities window and open the Assignments tab in the Details at the bottom of the window.
2. Use the Assign dropdown to pick Resource Requests.



# RESOURCE REQUEST AND FULFILLMENT

3. On the Open a Request for a Resource window, select the Role, Proficiency level, Resources Names, or Resource Codes to specify the type of resource needed.

Role Status	Roles	Proficiency	Resources	Resource Codes
Primary Role	...	Any		
		Any		
		Any		
		Any		
		Any		

4. Click the ellipse (...) to select the Role (or other field) and then select the search criteria to be used.
5. Click Select and then Save to update the assignment for the activity.

Select Role

View Roles By: Role Hierarchy

Search

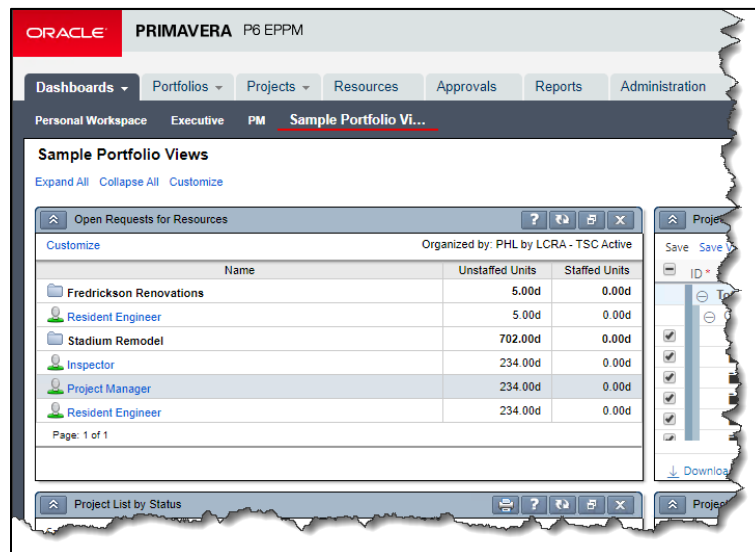
- ☐ PHL-PHL
- ☐ PM-Project Manager
- ☐ RE-Resident Engineer
- ☐ INSP-Inspector
- ☐ R-(New Role)
- ☐ Import-New Role Name
- ☐ T-Cultural-T-Cultural
- ☐ T-Const Support-T-Const Support
- ☐ T-Environmental-T-Environmental
- ☐ T-ERCOT Outage-T-ERCOT Outage
- ☐ T-Interconnect-T-Interconnect
- ☐ T-Legal-R\_E-T-Legal-R\_E
- ☐ T-Material-T-Material
- ☐ T-MCPR-T-MCPR
- ☐ T-Maintenance-T-Maintenance

# RESOURCE REQUEST AND FULFILLMENT

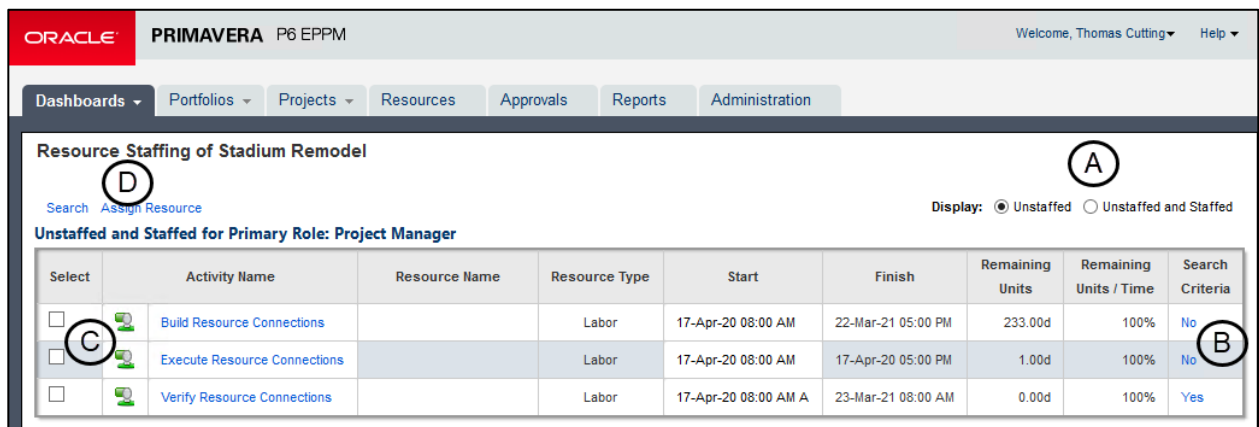
## Filling Requests

To view and fill the requests, open a Dashboard that contains the "Open Requests for Resources" portlet. It is displayed by Project with the open requested Roles under them.

1. Select the Role to fill.



2. The Resource Staffing window opens with the following features:



- A. Display Unstaffed or both Unstaffed and Staffed activities for the given Role.
  - B. View / add search criteria for the request A Yes in the search criteria field indicates that the request has criteria already entered from the assignment request.
  - C. Check box for which Activities to assign. Select the activities to be assigned by checking the corresponding box.
  - D. Search or Assign Resource options to either view options. Selecting search will open the Resource Search Criteria window.
3. Check the box beside the activities to be assigned (C above) and press Search (D above) to adjust the search criteria.

# RESOURCE REQUEST AND FULFILLMENT

ORACLE PRIMAVERA P6 EPPM Welcome, Thomas Cutting Help

Dashboards Portfolios Projects Resources Approvals Reports Administration

**Resource Search Criteria** (I)

Resource Staffing Select Template Save as Template Start: 17-Apr-20 08:00 AM A Finish: 23-Mar-21 08:00 AM Total Requested Units: 0.00d Requested Units/Time: 100%

**Define Search Criteria** (E)

Show Results Matching ☐ All search criteria ☒ Any search criteria

Role Status	Roles	Proficiency	Resources	Resource Codes
Primary Role	Project Manager (F)	3 - Skilled		
		Any		
		Any		
		Any		

**Define Sort Criteria** (H)

☐ Sort results by availability

**Compute availability for date range:**

☒ Activity Start to Finish (J)

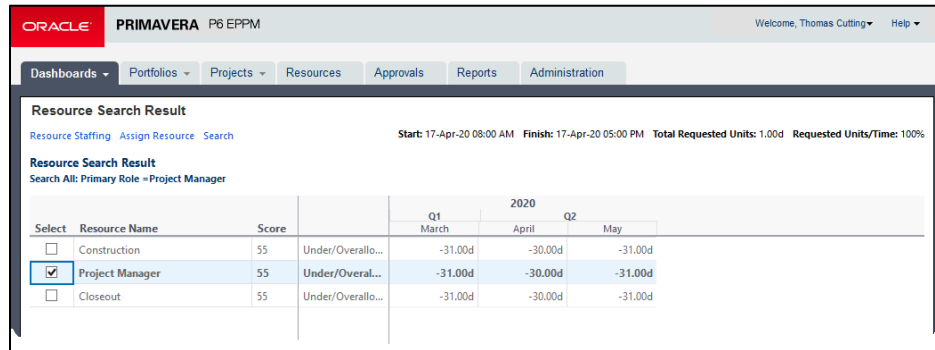
☐ Start  Finish

☐ Do not show overallocated resources

Save Run Search Close

- E. Show Results Matching All or Any  
Enables the logical And / Or to force the search to return Resources that match All the criteria or that match Any of them.
- F. Role Search Criteria  
Selects Role and skill level to filter the search by.
- G. Resource and Resource Code Criteria  
Selects specific Resources or Resource Codes to filter the search by.
- H. Define Sort Criteria and Availability  
Sorts the returned Resources by their availability which can be done for the entire duration of the activity or within a specified date range.
- I. Select / Save Template  
Allows the search criteria to be saved as a template and selected for future searches.
- J. Save / Run Search / Close  
Save will save the changes and stay on the window.  
Run Search will locate matches and display them in the Resource Search Result window.

# RESOURCE REQUEST AND FULFILLMENT



**Resource Search Result**

Resource Staffing Assign Resource Search

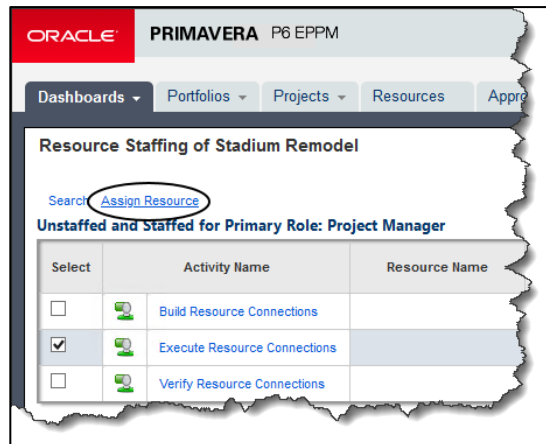
Start: 17-Apr-20 08:00 AM Finish: 17-Apr-20 05:00 PM Total Requested Units: 1.00d Requested Units/Time: 100%

Search All: Primary Role = Project Manager

Select	Resource Name	Score		2020		
				Q1 March	April	Q2 May
<input type="checkbox"/>	Construction	55	Under/Overallo...	-31.00d	-30.00d	-31.00d
<input checked="" type="checkbox"/>	Project Manager	55	Under/Overallo...	-31.00d	-30.00d	-31.00d
<input type="checkbox"/>	Closeout	55	Under/Overallo...	-31.00d	-30.00d	-31.00d

- Select the Resource to assign and press Assign Resource.
- Search returns to the Search screen (#3).
- Resource Staffing returns to the Resource Staffing Window (#2).  
Close shuts the window and returns to the previous screen.

4. Instead of searching from the Resource Staffing window, select Assign Resource.



**Resource Staffing of Stadium Remodel**

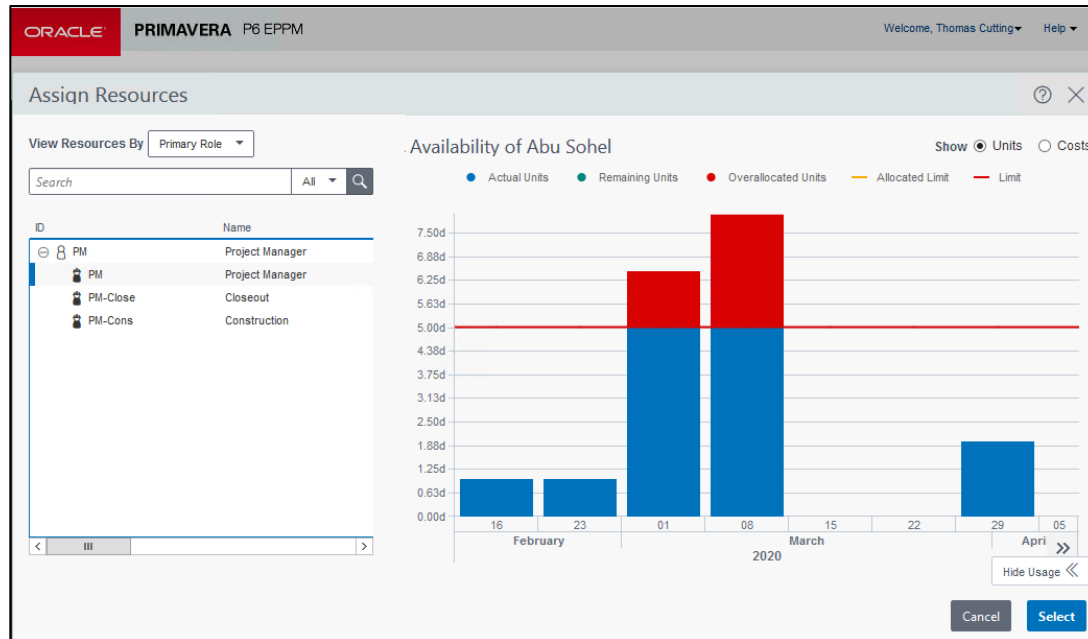
Search Assign Resource

Unstaffed and Staffed for Primary Role: Project Manager

Select	Activity Name	Resource Name
<input type="checkbox"/>	Build Resource Connections	
<input checked="" type="checkbox"/>	Execute Resource Connections	
<input type="checkbox"/>	Verify Resource Connections	

- The Assign Resources window displays the resources that match by the view selected (Primary Role is shown) with the option to show or hide usage.

# RESOURCE REQUEST AND FULFILLMENT



- Highlight the Resource needed and click Select to assign.
- Pick the Assignment Settings for Price per Unit and Units per Time and click Ok.

Primavera P6 - Assignment Settings - Mozilla Firefox

https://lcrap6.mlmpjctservices.com/p6/action/pm/confirmresourceassignment

Choose whether settings from the resource or assignment are used. To make these your default settings, go to Global Preferences, Resource Staffing section.

Use the Price per Unit from the:

☒ Resource ☐ Assignment

Use the Units per Time and Overtime Factor from:

☒ Resource ☐ Assignment

Buttons: OK, Cancel

# RESOURCE REQUEST AND FULFILLMENT

- Return to the Resource Staffing window to display the remaining activities to assign.

The screenshot shows the Oracle Primavera P6 EPPM interface. The top navigation bar includes 'Dashboards', 'Portfolios', 'Projects', 'Resources', 'Approvals', 'Reports', and 'Administration'. The main title is 'Resource Staffing of Stadium Remodel'. Below the title, there are links for 'Search' and 'Assign Resource'. A 'Display' section shows two radio buttons: 'Unstaffed' and 'Unstaffed and Staffed', with the latter being selected. The main content area is titled 'Unstaffed and Staffed for Primary Role: Project Manager' and contains a table with resource assignments.

Select	Activity Name	Resource Name	Resource Type	Start	Finish	Remaining Units	Remaining Units / Time	Search Criteria
<input type="checkbox"/>	Build Resource Connections		Labor	17-Apr-20 08:00 AM	22-Mar-21 05:00 PM	233.00d	100%	No
<input type="checkbox"/>	Verify Resource Connections		Labor	17-Apr-20 08:00 AM A	23-Mar-21 08:00 AM	0.00d	100%	Yes
Staffed Assignments								
<input type="checkbox"/>	Execute Resource Connections	Project Manager	Labor	17-Apr-20 08:00 AM	17-Apr-20 05:00 PM	0.00d	0%	Yes