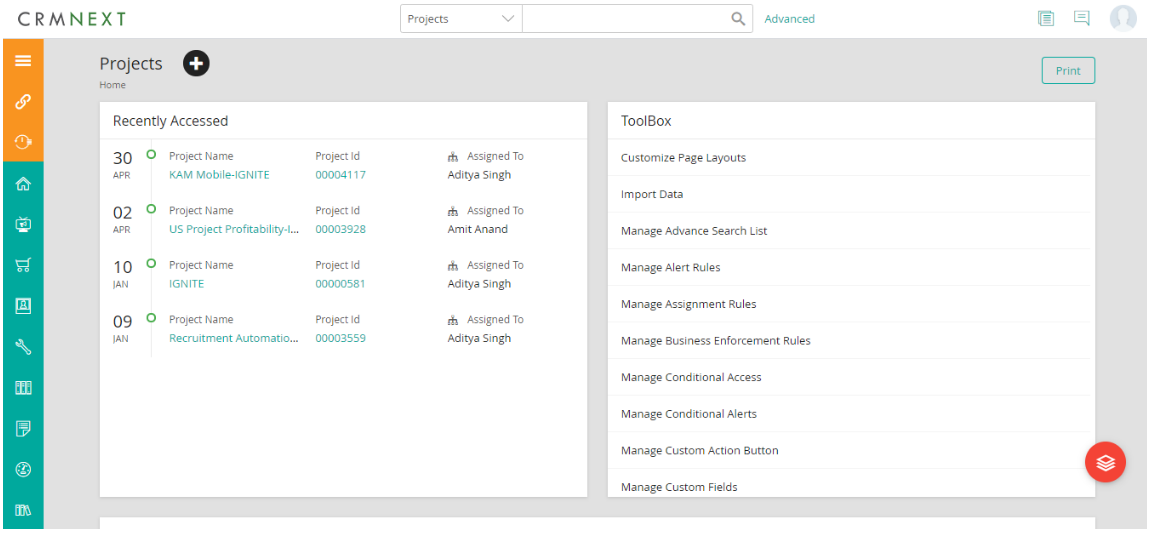
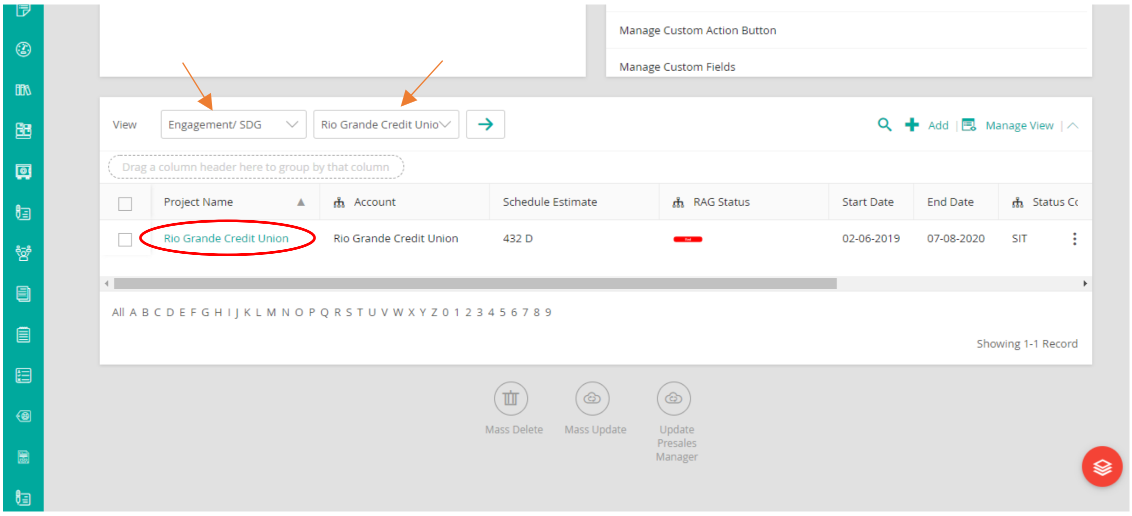
Steps: To Add a Resource in a Project

NOTE : If case is assigned regarding allotting project for timesheet -> move to invalid as the timesheet is based on a project and the project is being created by the project manager, we cannot allocate any project. So please get in touch with your (Reporting manager) for the same.

Step 1: Go to Required Object – (i.e Project in this case)

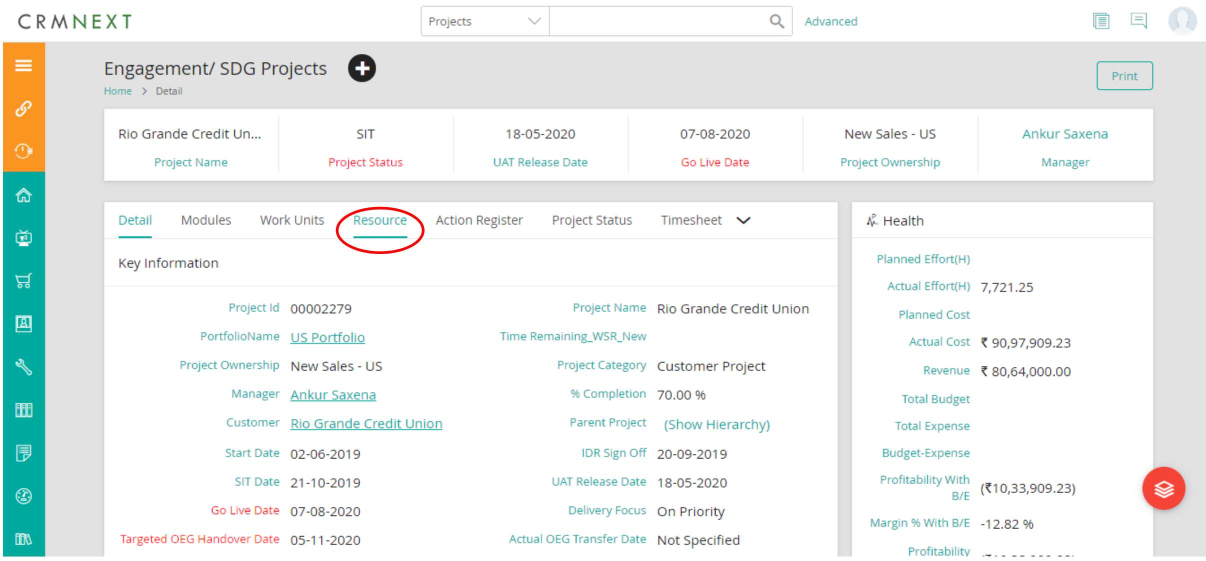


Step 2: Now Scroll down, where custom view is previewed. Select the Required view and corresponding project name in the scroll down menu respectively.

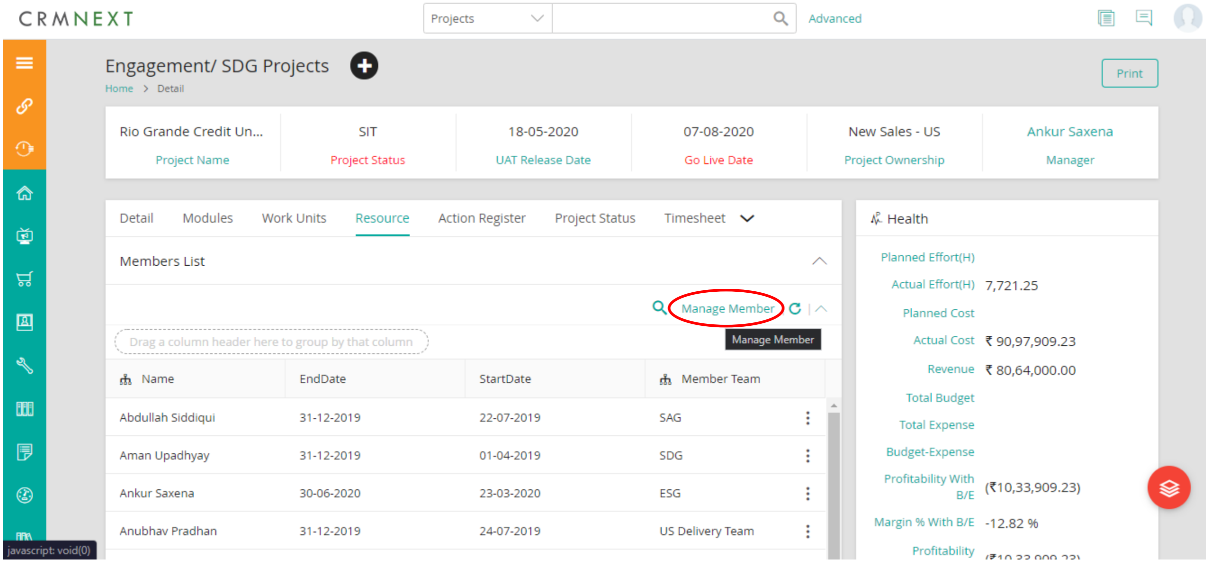


Step 3: List of related Projects would be listed down below. Click on the desired project you want to go to. (as showcased I have selected Rio Grande Credit Union as my Project)

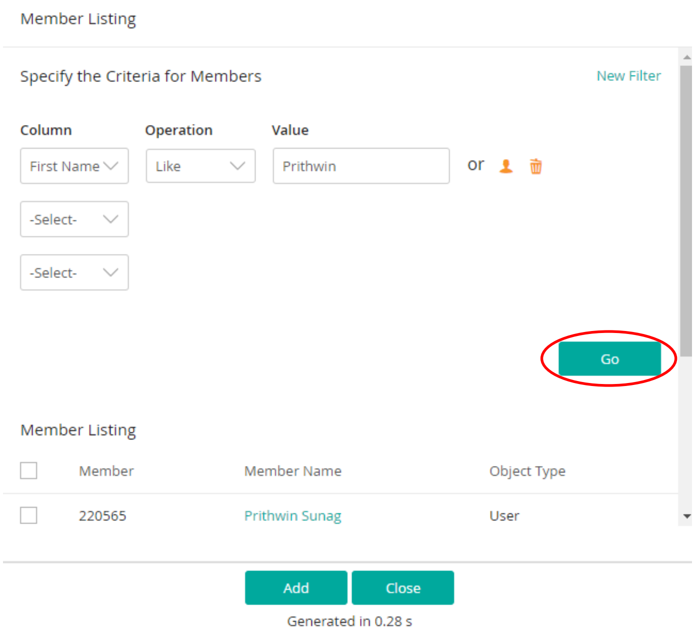
Step 4: On clicking the Project name it will direct to the Project's corresponding Detail page. Locate the **Resource** tab at fourth Tab from left and click on it.



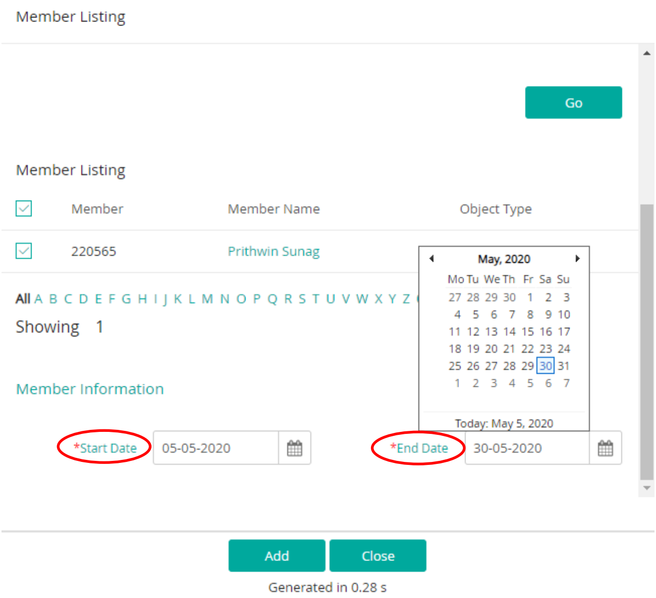
Step 5: On Clicking the Resource Tab it will redirect to a Resource page where members list is defined. Now to Add a new member, go to Manage Member in the right corner of the header list.



Step 6: On clicking Manage member, it will to a new window. Where one has to specify the criteria for members to be added. (For instance, let's select the column criteria as 'first name'. Operation as 'like', now enter the first name of the member to be added in the Value field.



Step 7: On clicking 'GO' button after providing the criteria. It will provide number of members related to provided criteria.



Step 8: Select the desired member by clicking on the check box provided in the left side corresponding to individual listing.

Step 9: Now after selecting the member, select the Start Date and End Date in the calendar pop up menu. After Selecting the dates, click on 'Add' button to finally get the desired member added to corresponding Project.

Step 10: The respective project name is visible in the timesheet of the corresponding member.