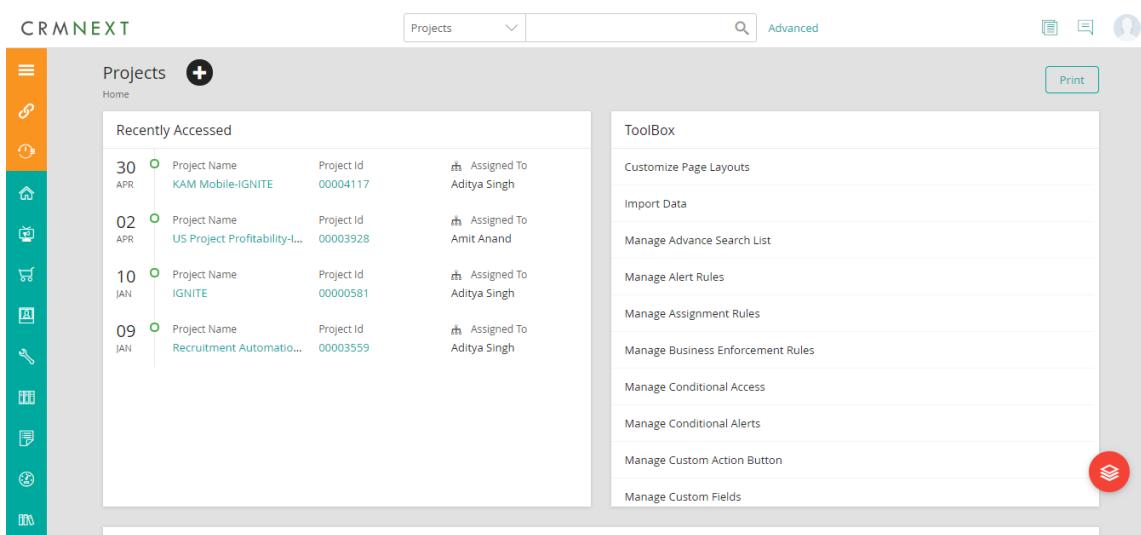


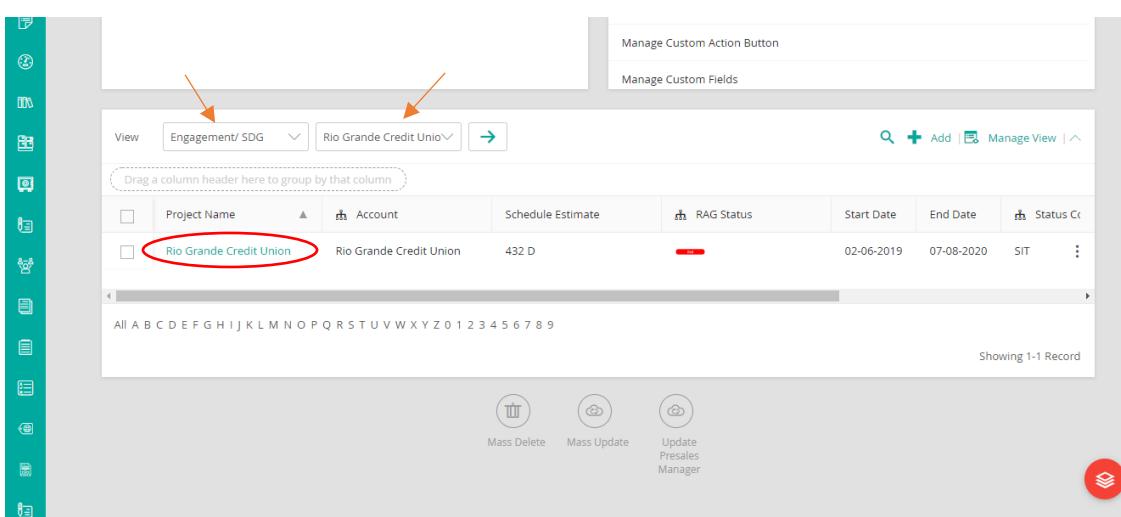
Steps: To Add a Resource in a Project

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)

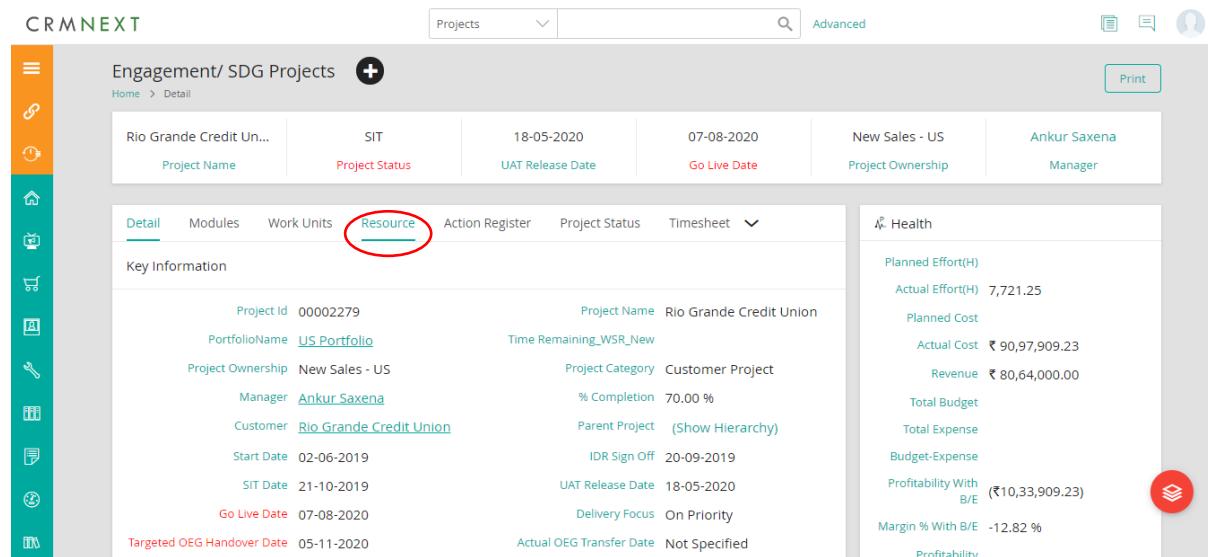


Step 2: Now Scroll down, where custom view is previewed. Select the Required view and corresponding project name in the scroll down menu respectively.



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.



The screenshot shows the CRM NEXT interface for the 'Engagement/ SDG Projects' module. The main title is 'Engagement/ SDG Projects' with a '+' icon. Below it, the project details are listed: Project Name (Rio Grande Credit Un...), Project Status (SIT), UAT Release Date (18-05-2020), Go Live Date (07-08-2020), New Sales - US (Project Ownership), and Ankur Saxena (Manager). A navigation bar below shows tabs: Detail (selected), Modules, Work Units, **Resource** (circled in red), Action Register, Project Status, and Timesheet. The 'Resource' tab is active, showing the following key information:

Project Id	00002279	Project Name	Rio Grande Credit Union
PortfolioName	US Portfolio	Time Remaining	WSR_New
Project Ownership	New Sales - US	Project Category	Customer Project
Manager	Ankur Saxena	% Completion	70.00 %
Customer	Rio Grande Credit Union	Parent Project	(Show Hierarchy)
Start Date	02-06-2019	IDR Sign Off	20-09-2019
SIT Date	21-10-2019	UAT Release Date	18-05-2020
Go Live Date	07-08-2020	Delivery Focus	On Priority
Targeted OEG Handover Date	05-11-2020	Actual OEG Transfer Date	Not Specified

To the right, there is a sidebar titled 'Health' with various financial metrics:

- Planned Effort(H): 7,721.25
- Actual Effort(H): ₹ 90,97,909.23
- Planned Cost
- Actual Cost: ₹ 80,64,000.00
- Total Budget
- Total Expense
- Budget-Expense
- Profitability With B/E: ₹10,33,909.23
- Margin % With B/E: -12.82 %
- Profitability

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.



CRM NEXT

Engagement/ SDG Projects +

Home > Detail

Print

Rio Grande Credit Un...	SIT	18-05-2020	07-08-2020	New Sales - US	Ankur Saxena
Project Name	Project Status	UAT Release Date	Go Live Date	Project Ownership	Manager

Detail Modules Work Units Resource Action Register Project Status Timesheet ▾

Members List

Drag a column header here to group by that column

Name	EndDate	StartDate	Member Team	⋮
Abdullah Siddiqui	31-12-2019	22-07-2019	SAG	⋮
Aman Upadhyay	31-12-2019	01-04-2019	SDG	⋮
Ankur Saxena	30-06-2020	23-03-2020	ESG	⋮
Anubhav Pradhan	31-12-2019	24-07-2019	US Delivery Team	⋮

Manage Member | Manage Member

Health

Planned Effort(H) 7,721.25
Actual Effort(H) 7,721.25
Planned Cost
Actual Cost ₹ 90,97,909.23
Revenue ₹ 80,64,000.00
Total Budget
Total Expense
Budget-Expense
Profitability With B/E ₹ 10,33,909.23
Margin % With B/E -12.82 %
Profitability

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.

Member Listing

Specify the Criteria for Members New Filter

Column	Operation	Value
First Name	Like	Prithwin
-Select-		
-Select-		

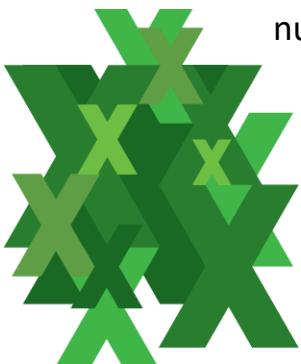
Go

Member Listing

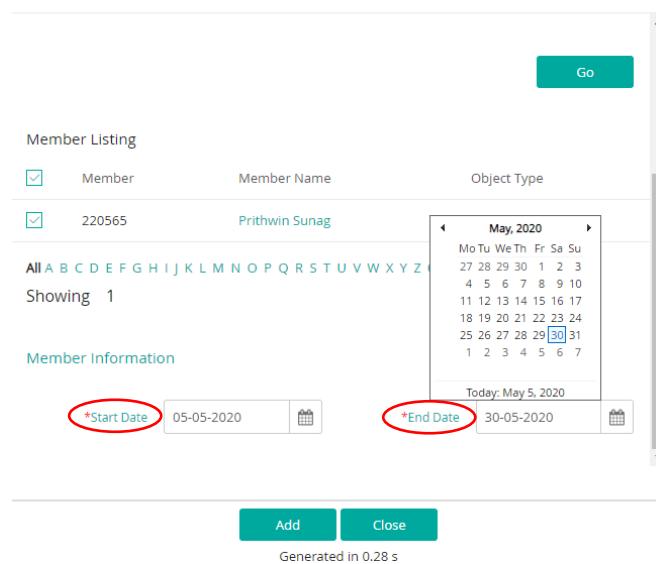
<input type="checkbox"/> Member	Member Name	Object Type
<input type="checkbox"/> 220565	Prithwin Sunag	User

Add Close Generated in 0.28 s

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



Member Listing



The screenshot shows the CRMNEXT Member Listing interface. At the top, there is a search bar with a 'Go' button. Below it, a table displays member information: Member ID (220565), Member Name (Prithwin Sunag), and Object Type. A dropdown menu for 'Object Type' is open, showing categories like All, A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z. Below the table, it says 'Showing 1'. In the 'Member Information' section, there are two date fields: 'Start Date' (05-05-2020) and 'End Date' (30-05-2020). Both fields have red circles around them, indicating they are required fields. A calendar pop-up is displayed over these fields, showing the month of May 2020. The date 30 is highlighted with a blue border, and the text 'Today: May 5, 2020' is visible at the bottom of the calendar.

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.

