



Workday Finance, configured by a Chartered Accountant.

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■ WORKDAY FINANCE · STEP BY STEP

Create Project Resource Plan

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■ Purpose

This guide provides step-by-step instructions for a Project Manager to Create a Resource Plan for a Project in Workday. Resource Plans are used to define the workers on a project and are essential for efficient project management and resource utilization. This process serves several key functions:

- It helps to effectively staff projects with qualified workers, ensuring that the right skills are available for project tasks.
- Enables workers to log their time against specific projects, facilitating accurate time tracking and reporting.
- Streamlines data entry by allowing the use of templates for common information, reducing errors and saving time.
- Assists in balancing project assignments across the workforce, optimizing resource allocation.

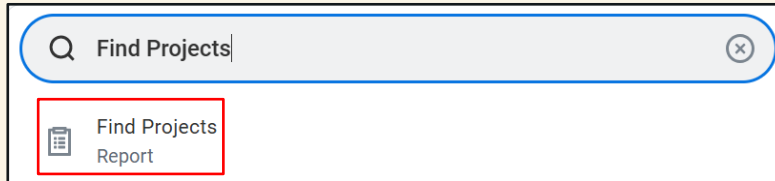
■ Prerequisites

Before Creating Project Resource Plans, ensure the following:

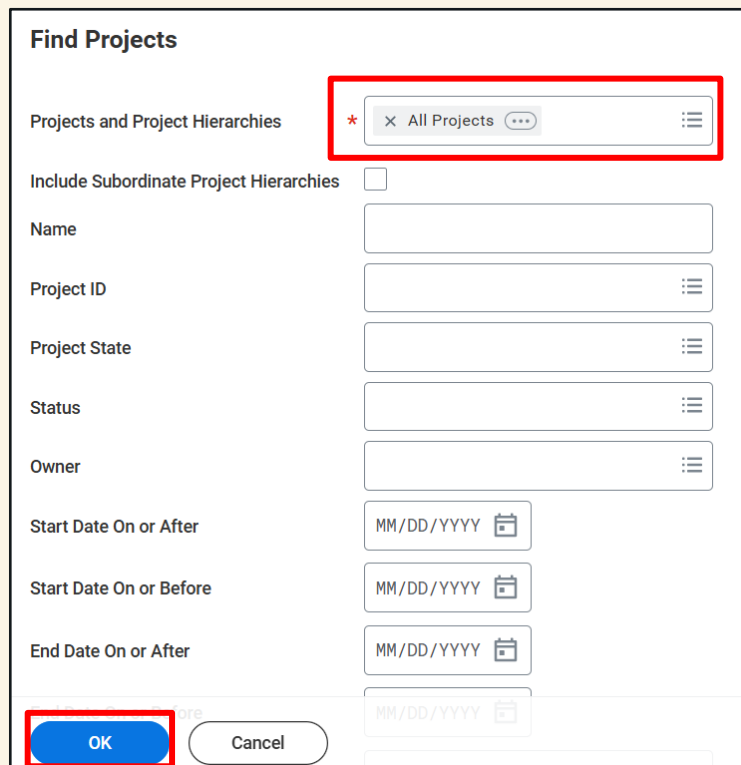
- You have the appropriate Workday security role (e.g., Project Manager, Project Administrator)
- Create a Project
- Set up Resource Plans
- Business Processes Configuration:
 - **Project Resource Plan Line** in the Project Tracking functional area must be set up.
 - **Request Worker** in the Projects functional area must be configured.

■ Create Project Resource Plan

- Type *Find Projects* into the search bar and select the task.



- Select the relevant project or project hierarchy that you are creating a resource plan for. Click OK.





- Find the relevant project listed in the report and navigate to the project detail window by clicking on the project name.

Find Projects 016 101

> **Details**

1 of 36 items

Project	Owner	Start Date	End Date	Project Status	% Complete	Company	Primary Project Hierarchy
Rec Center Development	Teresa Serrano	01/01/2025	06/30/2025	In Process	35%	Global Modern Services, Inc. (USA)	All Projects

- Select the *Resources* tab. Select the *Resource Plan* sub tab. Click the *Edit* button and then click the *+Add* button to add a *Resource Plan Line* to the resource plan for the project.

Owner **Teresa Serrano**

Percent Complete 35%

Status **In Process**

Project Plan **Resources** Financials Overview

Resource Plan Resource Forecaster Project Resources

Edit Synchronize Dates

Edit Resource Plan Rec Center Development

> **Project Information**

+ Add

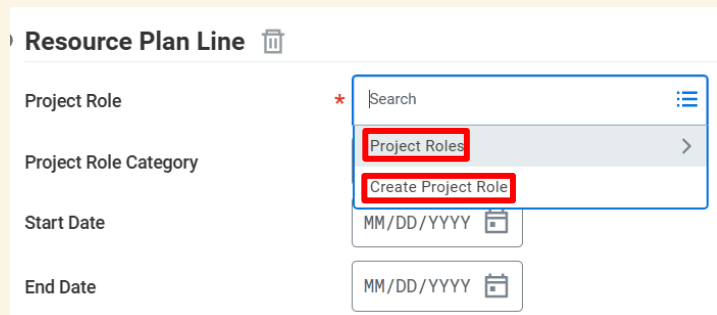
Click here to sort

Resource Plan Line

Project Role *



- For each *Resource Plan Line*, choose an existing *Project Role*.



Resource Plan Line 

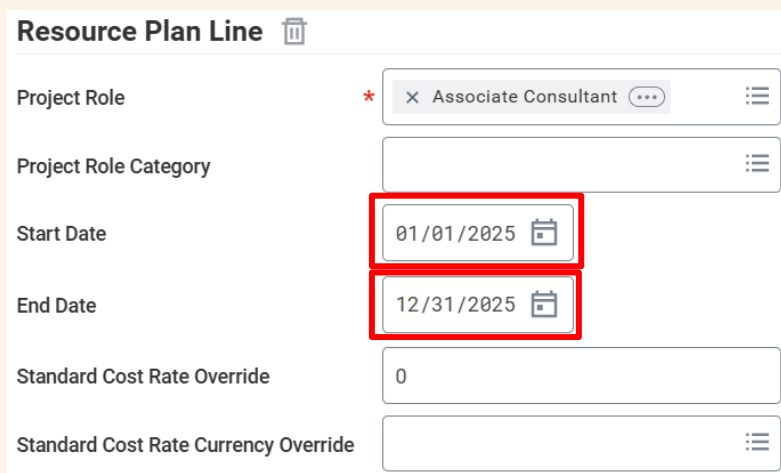
Project Role * 

Project Role Category 

Start Date 

End Date 

- Enter a *Start* and *End Date* for each resource plan line. The *Start Date* must be greater than or equal to the start date of the project. The *End Date* must be less than or equal to the end date of the project.



Resource Plan Line 

Project Role * 

Project Role Category 

Start Date 

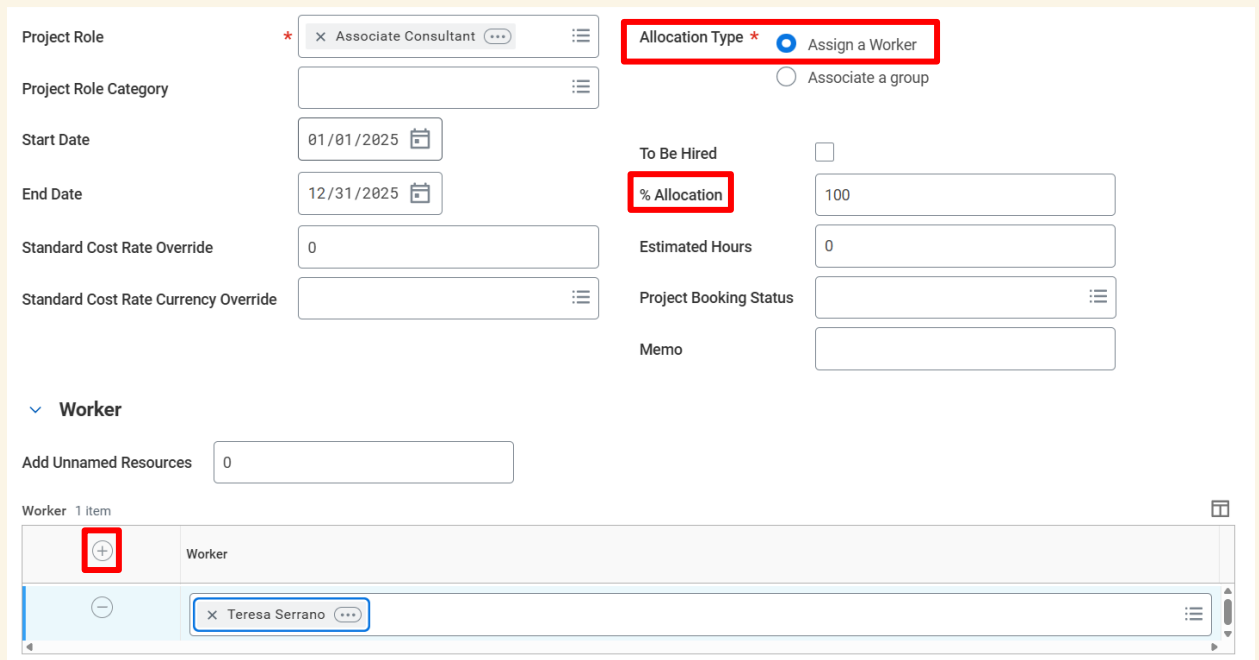
End Date 

Standard Cost Rate Override

Standard Cost Rate Currency Override 



- For *Allocation Type*, select *Assign a Worker* to add individual workers to a project role. The *% Allocation* field represents the time commitment of the worker. Under the *Worker* tab, add a *Resource Plan Line* and assign a worker.



The screenshot displays the Workday Finance interface for adding a worker to a project role. The **Allocation Type** section is highlighted with a red box, showing the **Assign a Worker** radio button selected. The **% Allocation** field is also highlighted with a red box, showing a value of 100. The **Worker** section is expanded, showing a table with one item: Teresa Serrano. The **Add Unnamed Resources** field is set to 0. The **Project Role** is set to Associate Consultant, and the **Start Date** is 01/01/2025 and the **End Date** is 12/31/2025.

Project Role *

Project Role Category

Start Date

End Date

Standard Cost Rate Override

Standard Cost Rate Currency Override

Allocation Type * ☒ Assign a Worker ☐ Associate a group

To Be Hired ☐

% Allocation

Estimated Hours

Project Booking Status

Memo

Worker

Add Unnamed Resources

Worker 1 Item

	Worker
+	Teresa Serrano

- When *Resource Plan Lines* have been completed, click *Submit*.

■ Common Errors and Resolutions

Issue	Description	Resolution
Resource Plan Not Inheriting	A project may not inherit the resource plan from its hierarchy as expected.	Check if the project is correctly linked to the project hierarchy. Ensure that the resource plan is set up at the hierarchy level and that the project is configured to inherit from it.
Errors in Assigning Workers	Users may face issues when trying to assign workers to tasks within the resource plan.	Confirm that the workers are available and have the necessary roles assigned. Review the project role assignments to ensure they match the requirements of the tasks.
Time Entry Restrictions	Project workers may be unable to log time against future dates	Review the project settings to ensure that time logging policies allow for future date entries. Adjust the configuration if necessary to enable this feature.

■ Best Practices

- Create a **unique resource plan** for each project if the resource needs differ. Use a **shared resource plan** for project hierarchies when all projects within the hierarchy utilize the same plan to reduce workload.
- When setting up a new project, consider inheriting a preconfigured resource plan from the project hierarchy or selecting a preconfigured template to streamline the process.
- Plan to categorize projects into primary and optional hierarchies for better reporting and management.
- Configure business processes so that projects within the same hierarchy use consistent approval types to streamline operations.



Thank You

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