

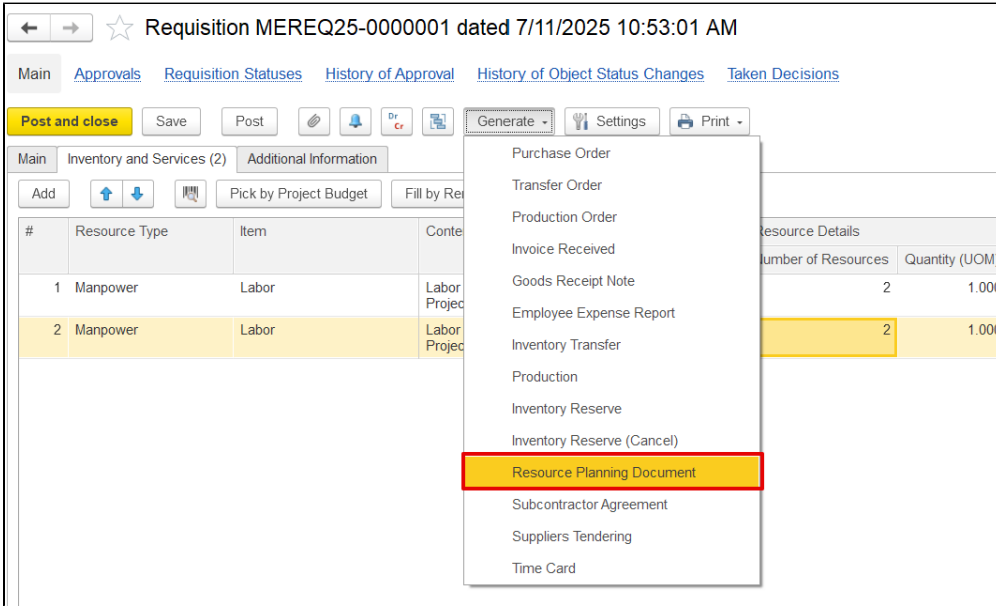
# 3.3.4.Resource Planning Document

A Resource Planning Document is an internal document that lists manpower or equipment needed for a project stage, along with quantities, period, shifts, requisitions, orders and other details. Its purpose is to plan these needs so that resources are properly scheduled, and the project runs without delays.

## How to create

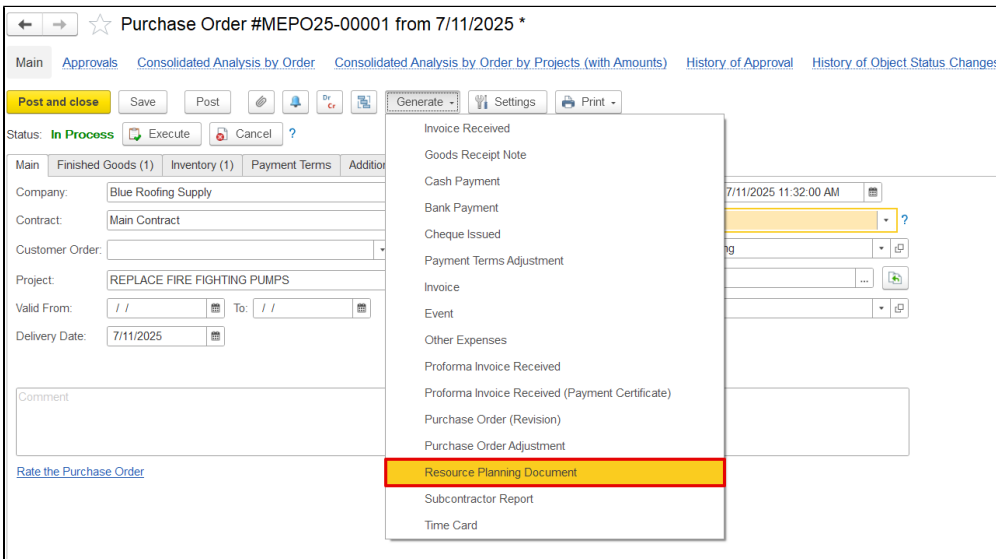
### a) Requisition

The resource planning document can be generated from the requisition document using the Generate Option.



### b) Purchase order (Hired Resources)

It can also be created using the Generate option in the purchase order document for hired resources.



### c) Project Costing Project Management documents Resource Planning document.

<ul style="list-style-type: none"> <li> Sales</li> <li> Purchasing</li> <li> Warehouse</li> <li> Production</li> <li> Money</li> <li style="border: 2px solid red;"> <b>Project Costing</b></li> <li> HR &amp; Payroll</li> </ul>	<h3 style="color: green;">Project Management Documents</h3> <ul style="list-style-type: none"> <li>Project Damages/Losses Report</li> <li>Project Item Pricing</li> <li>Project Scheduling</li> <li>Requisitions</li> <li>Request for Information (RFI)</li> <li style="border: 2px solid red;">Resource Planning Document</li> <li>Resource Planning Document Adjustments</li> <li>Time Cards</li> </ul>
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**Transaction Type**

The Transaction Type field determines how the Resource Planning Document is intended to be used in terms of planning duration and detail.

The two available options are **Long-term Planning** and **Period Planning**

Long-term planning is used when resources are needed over an extended period, such as several months or the full length of a project. It provides a high-level view of future resource needs. This type of planning focuses on estimating and organizing resources in advance rather than detailing period-by-period usage.

Period Planning focuses on organizing and allocating resources for a limited, specific period, such as daily, weekly, or monthly intervals. It addresses immediate operational needs, ensures the right resources are available at the right time, and supports detailed scheduling and day-to-day execution of tasks.

The screenshot shows the SAP Resource Planning Document form for document ME0025-00000006. The 'Transaction Type' dropdown menu is open, showing 'Period Planning' as the selected option. Other options visible in the dropdown are 'Long-term Planning' and 'Period Planning' (highlighted in yellow). The form also shows fields for Entity (MRB Engineering and Contracting), Department (Main Department), Project (Villa construction #35444), and Company (Carrefour).

**Resource type**

- **Fixed Asset** resources refer to equipment, machinery, or tools used in a project. Including this type of resource in documentation helps plan and schedule its use while confirming availability. Fixed asset resources may be either company-owned or hired from an external supplier.
- **Employee** resources are individuals who contribute to a project. They are used for labor planning, tracking work hours, and calculating costs. Employee resources can consist of internal staff or externally contracted personnel.

Resource Planning Document ME0025-00000006 dated 11/18/2025 4:18:37 PM \*

Main Approvals History of Approval History of Object Status Changes Taken Decisions

Post and close Save Post Generate - Setting

Main Resources

Entity: MRB Engineering and Contracting Number: ME0025-00000006 Date: 11/18/2025 4:18:37 PM

Department: Main Department Transaction Type: Period Planning

Project: Villa construction #35444 Resource Type: Fixed Asset

Requisition:   Hired Resource

Comment

## Hired Resources

A **hired resource** refers to employees or equipment acquired from an external source, enabling the management of subcontracted manpower and equipment.

When the hired resources feature is activated, extra fields become available, including **purchase orders**, **company**, and **contracts**. These fields are used to provide the following information:

- **Purchase Order (PO)** - This is used to identify the purchase order under which the resources to be procured or hired are requested.
- **Company** - It is used to specify the external company providing the resource.
- **Contract** - Details the agreement that outlines the resource's work and duration.

Resource Planning Document ME0025-00000006 dated 11/18/2025 4:18:37 PM

Main Approvals History of Approval History of Object Status Changes Taken Decisions

Post and close Save Post Generate - Setting

Main Resources (1)

Entity: MRB Engineering and Contracting Number: ME0025-00000006 Date: 11/18/2025 4:18:37 PM

Department: Main Department Transaction Type: Period Planning

Project: Villa construction #35444 Resource Type: Fixed Asset

Requisition:   Hired Resource ?

Purchase Order: Purchase Order #MEPO25-00005 from 11/18/2025

Company: Carrefour

Contract: Main Contract

Comment

How to create Hired Employee/Fixed assets

Go to **Company Master Data** and check the hyperlinks under the company name-**Hired Employees** and **Hired Fixed Assets**. Click the appropriate hyperlink.

Carrefour (Company)

Main Sales Statement of Mutual Settlements Documents Company Contracts Contact Persons Bank Accounts Supplier Price Types Events Addresses Default GL Accounts Hired Employees Hired Fixed Assets

Employees

Create Create group Set As a Default Responsible Search (Ctrl+F) More actions ?

Hired Resource

Full Name	Code	Individual	Hired Resource	Company	Position
Salman Farsi	000000030	Salman Farsi	✓	Carrefour	Labor supervisor

### 1. Hired employees

- **Folder** - Folder to group the employees.
- **Code** - Unique system-generated ID.
- **Individual** - Short name of the employee.
- **Full Name** - Legal name used in documents and reports
- **Hired Resource** - Marks active employees for hiring. *If unchecked, it redirects to the company employee creation page*
- **Company** - Subcontractor the employee belongs to
- **Position** - Job title or role
- **E-mail** - Employee contact detail (email)

← → ☆ Salman Farsi (Carrefour) (Employee)

Main [Default GL Accounts](#) [Accruals and Deductions Plan](#) [Accruals and Deductions Plan \(Non Payroll Costs\)](#) [Bank Accounts](#)

**Save and close** Save Edit GL Accounts

Main Fixed Assets

Picture

Folder:  Code: 000000030

Individual: Salman Farsi

Full Name: Salman Farsi

Hired Resource:  Company: Carrefour

Position: Labor supervisor

E-mail:

## 2. Hired Fixed asset

- **Folder** - Folder to group the asset.
- **Status** - Indicates the asset's stage, e.g., New, Active, etc.
- **Description** - Short label or name of the asset.
- **ID** - Unique system-generated identifier.
- **Type** - Accounting classification.
- **Category** - Sub-classification under the asset type.
- **Hired Resource-Company** - Shows which entity owns the asset.
- **Use Scheduling** - Indicates that a fixed asset is linked to usage planning. When enabled, the asset becomes a schedulable resource with a calendar, allowing users to reserve and manage its availability.

← → ☆ Skid Steer Loader - Model S570 (Blue Roofing Supply) (Fixed Assets)

Main [Documents of Fixed Asset](#) [Fixed Asset Locations](#) [Fixed Assets Document Expiration Dates](#) [Fixed Assets Documents](#) [Fixed Assets Parameters](#)

**Save and close** Save Edit GL Accounts

Folder: Tools & Equipments Status: **New** [Change Status](#)

Description: Skid Steer Loader - Model S570 ID: S570

Type: Property, Plant and Equipment

Category: Property, Plant and Equipment

Hired Resource:  Company: Blue Roofing Supply

Use Scheduling:  [Skid Steer Loader - Model S570 \(Blue Roofing Supply\)](#)

## Resource planning document

### Main Tab

- **Entity** - Choose the name of the entity.

- **Department** - Select the department requesting the resources.
- **Project** - Associate the relevant project.
- **Requisition** - Link to the corresponding requisition document.
- **Transaction Type** - Specify the type of transaction, such as period planning or long-term planning.
- **Resource Type** - Determine the resource's category, for example, a fixed asset or an employee.
- **Hired Resource** - enable the option if the resource is externally contracted.
- **Comment** - Add any optional notes or internal remarks.

Resource Planning Document (create)

Main Approvals History of Approval History of Object Status Changes Taken Decisions

Post and close Save Post Generate Setting

Main Resources (2)

Entity: MRB Engineering and Contracting Number: Date: 12/ 7/2025 12:00:00 AM

Department: Main Department Transaction Type: Period Planning

Project: Villa #351 - Dubai South Resource Type: Employee

Requisition: Requisition MEREQ25-0000004 dated 11/11/2025 12:00:00  Hired Resource ?

Comment

## Resources Tab

- **Project Task** - Name of the task assigned to the resource.
- **Project WBS** - Work Breakdown Structure of the project
- **Position** - Role or job title of the resource.
- **Item** - Type of resource.
- **UOM** - Unit of Measure
- **Requested** -
  - Number of resources** - Number of resources required per shift.
  - Shifts** - Total number of planned shifts.
  - Start Date** - Scheduled start date for resource deployment.
  - End Date** - Scheduled end date for resource deployment.
  - Quantity** - Total number of resources, calculated as **Number of Resources × Shifts**.
  - Quantity (default UOM)** - Total quantity converted into the system's default unit of measure. For example, if one shift equals 8 hours, the calculation would be **Number of Resources × Number of Shifts × 8 hours per shift**.

Resource Planning Document (create)

Main Approvals History of Approval History of Object Status Changes Taken Decisions

Post and close Save Post Generate Setting More actions

Main Resources (2)

Add Resource Scheduling Search (Ctrl+F) More actions

#	Project Task	Project WBS	Position	Item	UOM	Requested						
						Number of ...	Shifts ...	Start Date	End Date	Quantity	Quantity (def. UOM)	
1	Reinforcement	Villa #351 - Dubai South, 3.3.1	Labor	Labor	day shift (8 hours)	1	6.000	11/10/2025	11/15/2025	(+)	6.000	48.000
2	Reinforcement	Villa #351 - Dubai South, 3.3.3	Labor	Labor	day shift (8 hours)	1	6.000	11/11/2025	11/15/2025	(+)	6.000	48.000

- **Scheduled** -
  - Quantity** - The number of resource units scheduled for that specific shift or date. This value is populated according to the resource scheduling document.
  - Quantity (default UOM)** - Converts the amount scheduled into the system's default unit of measure

Resource Planning Document (create) \*

Main Approvals History of Approval History of Object Status Changes Taken Decisions

Post and close Save Post Generate - Setting

Main Resources (2)

Add Resource Scheduling Search (Ctrl+F) More actions -

UOM	Requested						Scheduled			
	Number of Resources	Shifts Quantity	Start Date	End Date	Quantity	Quantity (def. UOM)	Quantity	Quantity (def. UOM)	Quantity	Quantity (def. UOM)
day shift (8 hours)	1	6.000	11/10/2025	11/15/2025	(+)	6.000	48.000	6.000	48.000	48.000
day shift (8 hours)	1	6.000	11/10/2025	11/15/2025	(+)	6.000	48.000	6.000	48.000	48.000

Scheduled resources

Date	Employee	Shift	Main Shift Part	Start Time	End Time	Hours
11/13/2025	Danish	day shift (8 hours)	✓	09:00	18:00	8.000
11/14/2025	Danish	day shift (8 hours)	✓	09:00	18:00	8.000
11/15/2025	Danish	day shift (8 hours)	✓	09:00	18:00	8.000
11/10/2025	Arjun	day shift (8 hours)	✓	09:00	18:00	8.000
11/11/2025	Arjun	day shift (8 hours)	✓	09:00	18:00	8.000
11/12/2025	Arjun	day shift (8 hours)	✓	09:00	18:00	8.000
11/13/2025	Arjun	day shift (8 hours)	✓	09:00	18:00	8.000
11/14/2025	Arjun	day shift (8 hours)	✓	09:00	18:00	8.000

Show Scheduled Resources for the Selected Row

## Resource Scheduling

This option is used to allocate specific resources (e.g., labor) to project tasks across defined dates and shifts.

### Header section

- **Entity** - The entity managing the resources
- **Project** - The specific project requiring the resources.
- **Project Task** - The particular task within the project.
- **Position** - The role or job title of the scheduled resources.
- **Filter by Position Button** - This button controls whether the schedule shows **only employees with the selected position** or **all employees**.
  - a. **Enabled** - Shows only employees with the current position.
  - b. **Disabled** - Shows all employees, allowing scheduling of resources from other positions.
- **Shift** - Type of working hours or shift pattern.
- **No. of Resources** - Total number of individuals needed.
- **Shifts Quantity** - Total count of shifts planned.
- **Start/End Dates** - The timeframe for which resources are scheduled.

Resource Scheduling

Entity: MRB Engineering and Contracting Position: Labor Start Date: 11/10/2025

Project: Villa #351 - Dubai South Shift: day shift (8 hours) End Date: 11/15/2025

Project Task: Reinforcement Number of Resources: 1 Shifts Quantity: 6.000

### Schedule/Release

- **On Date** - Assigns the selected employee to a **single, specific date**, ideal when the employee is needed for only one particular day, avoiding scheduling conflicts.
- **For Period** - Schedules the employee for the **maximum possible days within a given period**, covering as many consecutive or available days as possible during the requested timeframe.
- **All Available** - Automatically selects the **first available resources** based on the number of resources and days requested, prioritizing resources that can be scheduled **continuously for the entire requested period** to ensure efficient allocation.

Once a scheduling option is selected, employees are assigned accordingly. Scheduled shifts are shown in green, and in the next resource scheduling document, they turn red to indicate the employees are already assigned.

### Resource Scheduling

Entity:

Project:

Project Task:

On Date	Code	10.11 Mon
For Period	000000025	
All Available	000000023	

**Table field**

- **Employee** - Name of the worker assigned to shifts
- **Code** - Unique code of the employee
- **Date** - The specific workday being scheduled
- **Day** - Day of the week corresponding to the date

Employee	Code	01.11 Sat	02.11 Sun	03.11 Mon	04.11 Tue	05.11 Wed	06.11 Thu	07.11 Fri	08.11 Sat	09.11 Sun	10.11 Mon	11.11 Tue
New test	000000027											
New test 2	000000028	Not available	Not available	Not available	Not available	Not available	Not available	Not available	Not available	Not available	Not available	Not available
Nick	000000016											
Pavel	000000022											
Yusuf	000000023	day shift (8 hours)	day shift (8 hours)									
Elsamawal	000000024		day shift (8 hours)									
Danish	000000025	day shift (8 hours)	day shift (8 hours)									Not available
Arjun	000000026		day shift (8 hours)									
		1	1	2	2	2	2	2	2	2	2	2

■ Available   
 ■ Busy   
 ■ Busy (Transitional Shift)   
 ■ Collision  
■ Not Available   
 ■ Scheduled   
 ■ Scheduled (Transitional Shift)

00:00	01:00	02:00	03:00	04:00	05:00
06:00	07:00	08:00	09:00	10:00	11:00
12:00	13:00	14:00	15:00	16:00	17:00
18:00	19:00	20:00	21:00	22:00	23:00

Color	Meaning	Reason / Explanation
Light Blue	Available	Indicates the resource is free and can be scheduled.
Pink	Busy (Transitional Shift)	Indicates a partial or transitional busy shift overlapping with another activity.
Yellow	Collision	Indicates a scheduling conflict where overlapping assignments occur.
Gray	Not Available	Indicates the resource cannot be scheduled for this day (resigned or employed in the middle of the requested period).

<b>Red</b>	Busy	Indicates the resource is occupied with a full shift and cannot be assigned.
<b>Bright Green</b>	Scheduled	Indicates the resource is fully scheduled for the day.
<b>Light Green</b>	Scheduled (Transitional Shift)	Indicates the resource is scheduled for the day with a transitional or partial shift.

Once scheduled, the data can be sent to the document using the option Transfer to document to finalize the schedule.