Project Portfolio Management (PPM) – Resource Assignment Process

PM
- **Identify resource** need
- **Add Team** name to project

PM & **RM**
- **Identify resource** and **availability**

PM
- **Replace Team** name with **Resource** name
- **Add Default Allocation %**

RM
- **Hard book resource**

PM
- **Build** project plan
- Select **Auto Schedule** to create baseline schedule then **Allocate from Estimates > Save Schedule**

RM
- Recieve push notification with **Mixed Booking** status
- **Hard book resource** again to finalize