

Guidance

G3184

Engineering Resource Deployment Scheme Template Completion

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1 Purpose

The purpose of this Guidance is to provide guidance for Programme Resource Planners and the Deployment Assessors (Engineering Functional Managers), with which to complete their inputs to the Engineering Resource Deployment Scheme (ERDS). It is intended to be read in conjunction with the ERDS Process which will support the reader's better understanding of the scheme.

ERDS is comprised of three key sections; these are based around details of the person & role, requirement of time & project, and update information. Each of the three key sections can be updated by either the Programme Resource Planners, Deployment Assessors or the Scheme Administrator each of whom will need to be aware of how it is completed in order to fully and accurately complete their own parts.

The quality and accuracy of the information recorded in the template alone will dictate how well the ERDS achieves its objectives. This guidance document is intended to ensure the quality and accuracy of template completion. Additional guidance can be sought from the ERDS Administrator.

2 When to Complete the Template

Programme Resource Planners are required to complete relevant parts of the template each period and then return it to the ERDS Administrator. The quality and accuracy of the information provided by the programme and the timely return of the forecast is the responsibility of the Programme Resource Planner.

This information, once updated to the master document, will be re-cut and issued to the Engineering Functional Managers to give them visibility of those engineers within their technical realm. This will also flag up to the Engineering Functional Managers any competency assessments that need to be made.

For all those resources being utilised by the programme and which the programme wishes to retain up to at least the look ahead window there is no need for the programme to provide any further information.

A Programme Resource Planner / Engineering Functional Manager will only need to enter new/updated information into their programmes template each period if any of the following conditions exist:

- a) An individual is leaving the programme (transferring or leaving CPD)
- b) A new full time or part time demand occurs, either through someone leaving the programme that needs to be replaced or the creation of a new full or part time role
- c) An individual is not fully utilised by the programme (i.e. potential for sharing)
- d) An individual is no longer required by the programme at all and is available for transfer to another programme
- e) An individual will be joining/has joined the programme

- f) Previous information provided in respect of any of the above in period submissions is required to be updated, including revision of forecast start and finish dates

3 How to Complete the Template

The following sections provide guidance for completing sections of the template according to the conditions above. It is expected that Programme Resource Planners will occasionally be presented with situations which are not immediately resolved by the guidance. In such instances it is incumbent upon them to seek further guidance from the ERDS Administrator for clarification and inclusion in their completed template.

3.1 I Want To...

This part of the document provides guidance on the fields that will need to be completed to meet the requirements of the conditions above, namely:

- Record resource is about to leave/left my programme
- Fill a full time demand (resource to be owned by the programme)
- Fill a part time demand (resource shared from another programme)
- Show I have a resource that is not fully utilised (potential for sharing)
- Seek full release of resource to another programme
- Add a new named resource to my programme headcount
- Update previously submitted details including demand forecasts

A brief description of the field and its actions is provided; further information is available either in the associated process document or from the ERDS system administrator.

3.2 Record an engineer is leaving my programme

If a named resource on a programme is leaving the programme and/or the company, the following fields against the existing resource name entry need to be updated.

- Programme Owner / Requestor – select 'Redeployed' from the drop down box if they are moving to another programme
- Status – select the 'Leaving' option from the drop down box
- Planned Release Period – should reflect actual end date period (1 to 13) of their leaving
- Planned Release Year – in the format 20xx/yy, should reflect actual end date year
- Comments – state why the resource is leaving (e.g. moving to xyz programme, leaving LU)
- Data Changed From Last Period? – enter 'Yes' to highlight changes to the ERDS scheme administrator