

Overview

This Job Aid defines the steps to follow when requesting work resources to be allocated to projects in Sensei IQ.

Work resources have defined availability and may have their time scheduled by a line manager. At this point in the project planning process, the project manager submits a request for resources to support the approved project. The request is then routed to the appropriate line managers for review and approval. Depending on your organizational rules, project managers are typically required to have resource commitments in their projects approved by the line managers before the execution of work.

This process allows your organization’s line managers and project managers to negotiate and record an “agreement” to make sure that work resources are being utilized appropriately and effectively.

There are two (2) ways to request resources for an approved project in Sensei IQ:

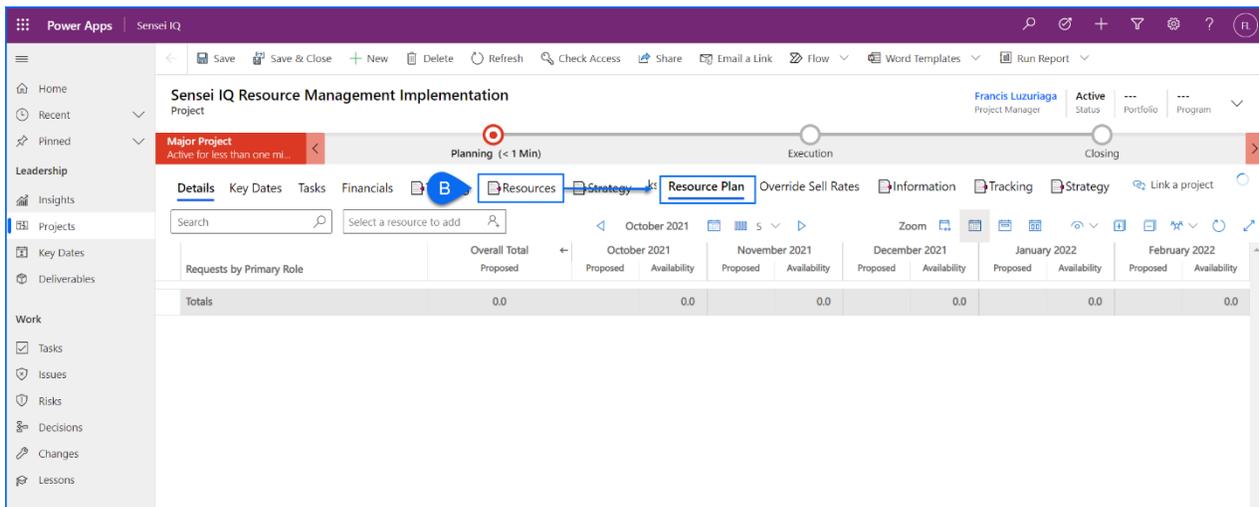
1. **Submit a request for generic resources** (when the resource roles and the demand for their time for a specific duration of the project is known).
2. **Submit a request for named resources** (when it is known which named resources are required to support the project and the demand for their time for a specific duration is known)

Submit a request for generic resources

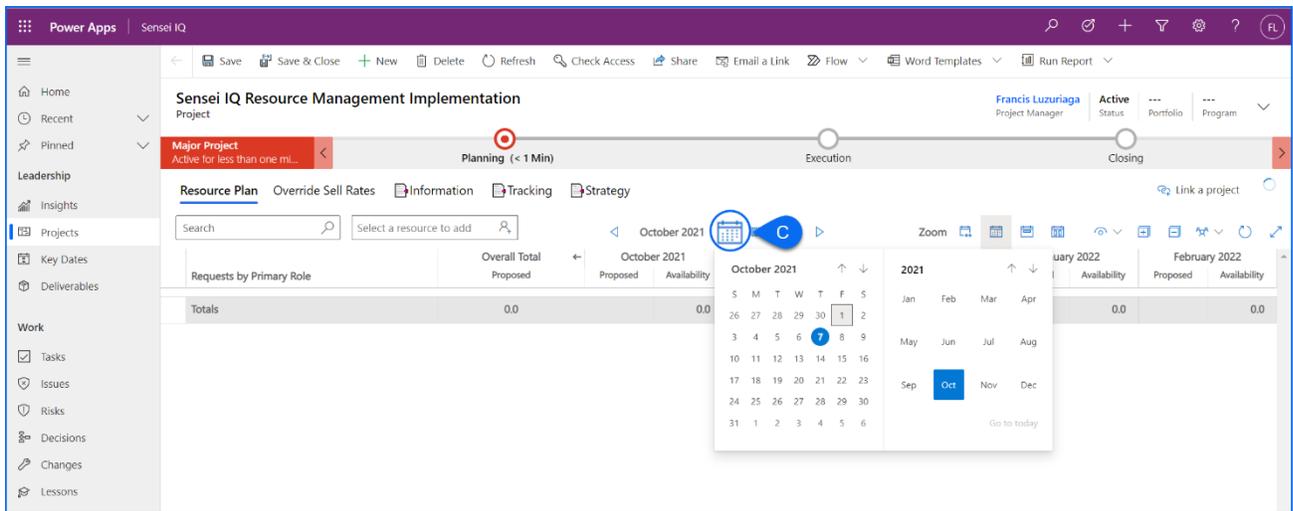
 **Project Manager**  **Project Leadership > Projects > Resources > Resource Plan**

1. SET THE RESOURCE DEMAND HORIZON

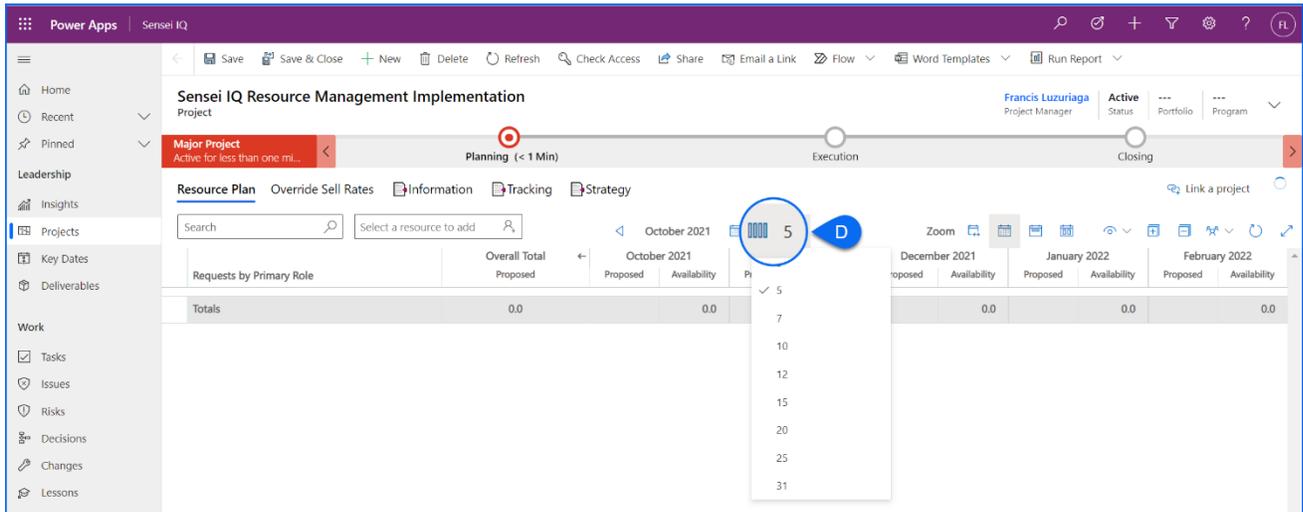
- a. Ensure you are in the **Project** area and click **Projects** in the **Leadership** section.
- b. Open the project record then expand the **Resource** segment and navigate to the **Resource Plan** tab.



- c. Change the selected **date** for the first period that you require the generic resources from.

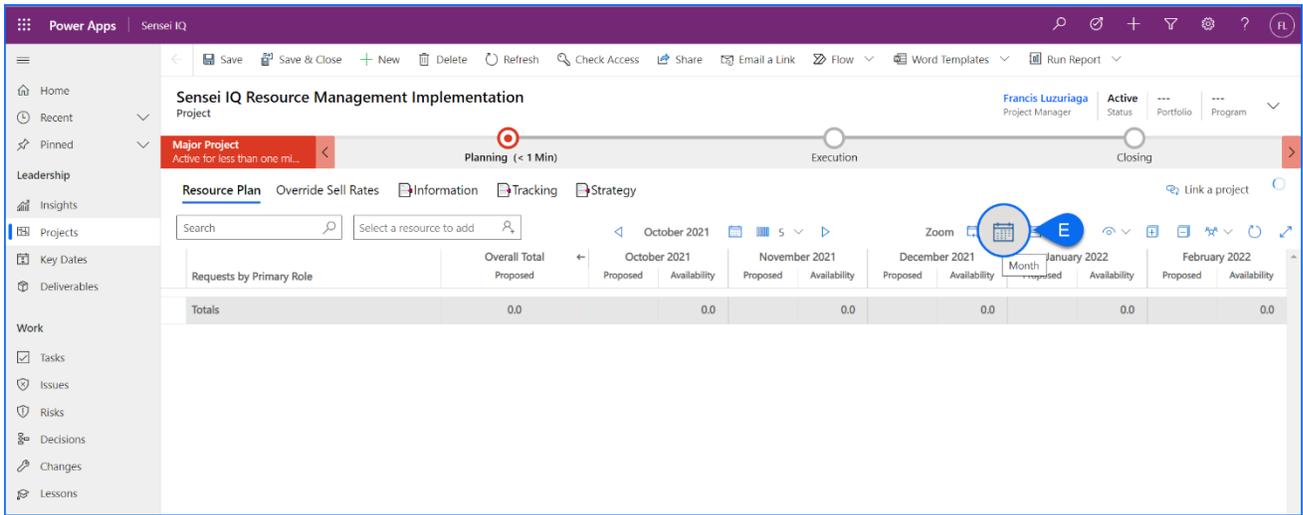


d. Set the number of **periods** you want to be visible on the page.

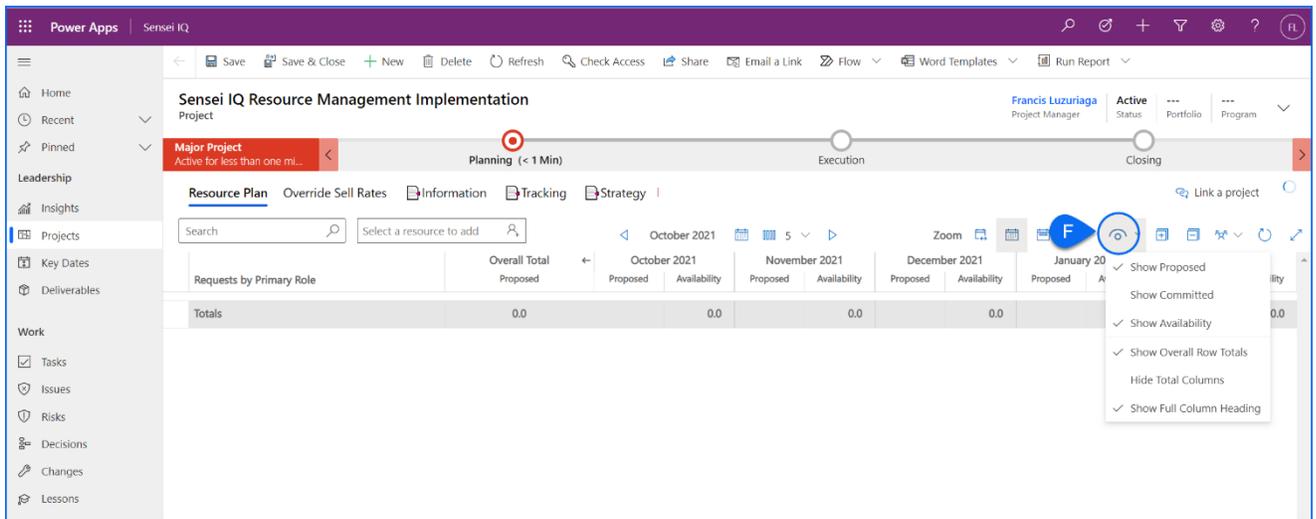


Important: Proposed hours recorded in all visible periods displayed on the page are submitted by default. Ensure that you apply the appropriate fixed value for the number of **periods** that you want to remain visible on the page before you click the **Submit** or **Submit and Save** button later. Otherwise, you have the option to **Submit all periods and Save** to include the proposed hours that are **not** in the visible periods.

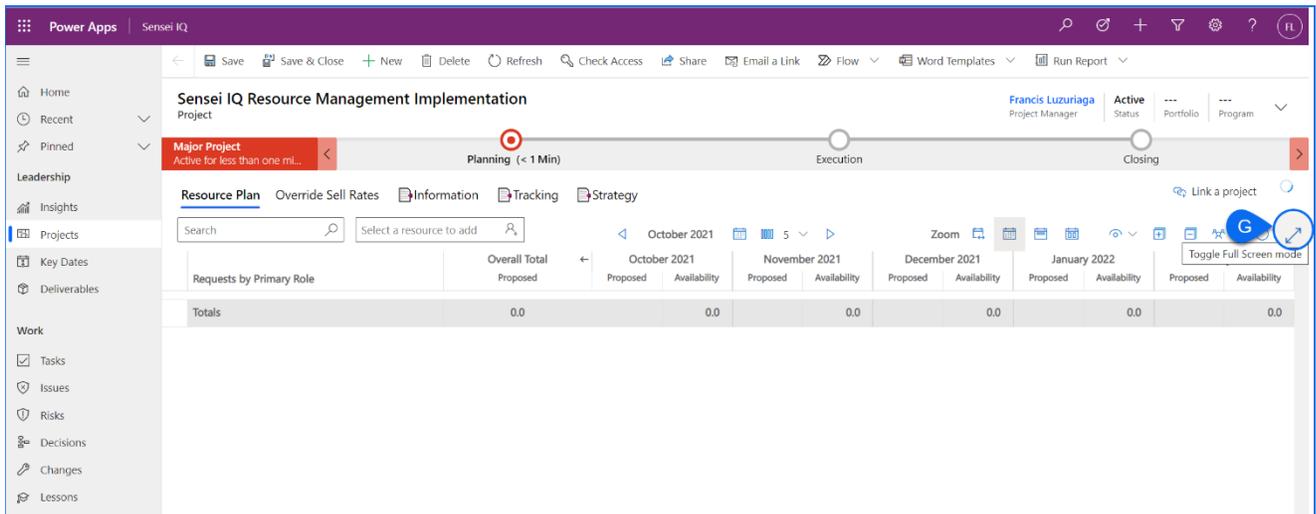
e. Set the **timescale** of the requested period using the **Zoom** feature.



f. Select the **Show Proposed, Show Availability, Show Overall Row Totals** and **Show Full Column Heading** options from the **View Options** menu.

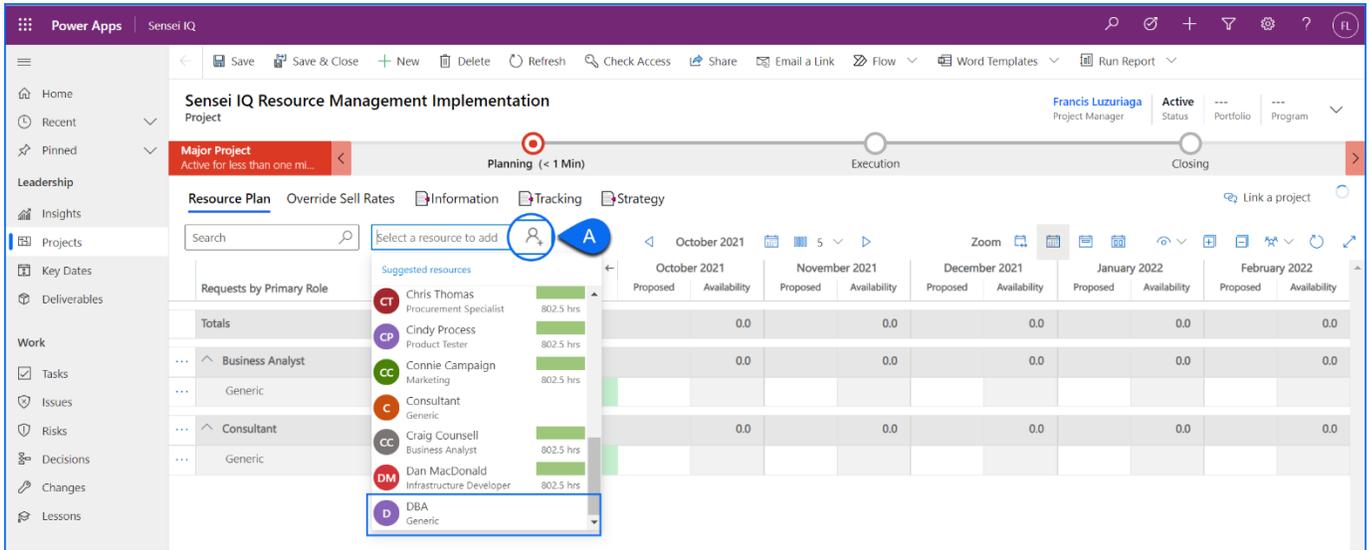


g. Enable the **Toggle Full Screen Mode** option to switch the **Resource Plan** screen to focus mode.



2. CREATE AND SUBMIT A REQUEST FOR GENERIC RESOURCES

- a. Click the **Add Resource to Plan** button to search and select the generic resource roles to add to your project individually.



Pro Tip: If you need to request two or more resources of the same generic resource role for your project, repeat this step until you have created multiple generic rows under the same primary role row. You should use this method so that the line manager can replace each request for the same generic resource with a named resource individually.

Requests by Primary Role	Overall Total Proposed	October 2021 Proposed	November 2021 Proposed	December 2021 Proposed	January 2022 Proposed	February 2022 Proposed
Totals	530.0	220.0	190.0	30.0	50.0	40.0
Consultant	80.0	30.0	20.0	0.0	20.0	10.0
Generic	80.0	30	20	0	20	10
DBA	100.0	50.0	30.0	10.0	0.0	10.0
Generic	100.0	50	30	10	0	10
Business Analyst	350.0	140.0	140.0	20.0	30.0	20.0
Generic	150.0	40	40	20	30	20
Generic	100.0	50	50			
Generic	100.0	50	50			

- b. Once you have added all the generic resource roles required in your project, enter the required effort in hours in the **Proposed** columns across the visible periods.
- c. Click the **Save** button to save your changes if you want to modify and submit your resource requests later.

Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	420.0	150.0	0.0	120.0	0.0	60.0	0.0	90.0	0.0	0.0	0.0
Business Analyst	120.0	40.0	0.0	30.0	0.0	20.0	0.0	30.0	0.0	0.0	0.0
Generic	120.0	40		30		20		30			
Consultant	140.0	50.0	0.0	40.0	0.0	20.0	0.0	30.0	0.0	0.0	0.0
Generic	140.0	50		40		20		30			
DBA	160.0	60.0	0.0	50.0	0.0	20.0	0.0	0.0	0.0	0.0	0.0
Generic	160.0	60		50		20					

Important: At this point of the resource request process, the status of your proposed hours is displayed as **Draft**.

Consultant	190.0	50.0
Generic	190.0	50

d. Attach **comments** to each resource request for the line managers processing your requests (**recommended**).

Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	420.0	150.0	0.0	120.0	0.0	60.0	0.0	90.0	0.0	150.0	0.0
DBA	160.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Generic	160.0	60		50		20		30		60	
Business Analyst	120.0	40.0	0.0	30.0	0.0	20.0	0.0	30.0	0.0	40.0	0.0
Generic	120.0	40		30		20		30		40	
Consultant	140.0	40.0	0.0	20.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0
Generic	140.0	40		20		20		30		50	

Tip: You can click the **Row Menu** button (...) in front of the generic resource role row to view more options including **Submit** that allows you to submit each resource request for the visible periods or **Remove Resource** to delete the resource request from the list individually.

The screenshot shows a resource request table with columns for months from October 2021 to February 2022, each with 'Proposed' and 'Availability' sub-columns. A 'Consultant' role is selected, and a dropdown menu is open with options: 'Open Resource', 'Submit', 'Change Resource', and 'Remove Resource'. The 'Submit' option is highlighted.

Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	570.0	150.0	0.0	120.0	0.0	60.0	0.0	90.0	0.0	150.0	0.0
DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Generic	220.0	60		50		20		30		60	
Business Analyst	160.0	40.0	0.0	30.0	0.0	20.0	0.0	30.0	0.0	40.0	0.0
Generic	160.0	40		30		20		30		40	
Consultant	190.0	50.0	0.0	40.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0
Generic	190.0	50		40		20		30		50	

Tip: You can click the **Primary Role Menu** button (...) in front of the primary resource role name to remove the primary role and its associated resource requests from the list.

This screenshot is similar to the previous one, but the dropdown menu for the 'Consultant' role is open, and the 'Remove Role' option is highlighted. The 'Submit' option is no longer visible.

- e. Once you have created the request for generic resource roles for the project, click the **Submit and Save** button to formally submit all your resource requests for the visible periods.

The screenshot shows the bottom of the resource request interface. The 'Submit and Save' button is highlighted with a blue box, along with 'Save' and 'Cancel' buttons. A keyboard shortcut 'E' is also visible.

Tip: At this point of the resource request process, the status of your proposed hours (with attached comments) is displayed as **Submitted** and the cells they are contained in are highlighted in **red** denoting that the hours are not yet committed. The line managers can now review and process your resource requests from the **Resource Demand** dashboard in Sensei IQ.

...	^ Business Analyst	160.0	40.0	0.0	30.0	0.0	20.0	0.0	30.0
...	Generic	160.0	40		30		20		30
...	^ Consultant	190.0	50.0	0.0	40.0	0.0	20.0	0.0	30.0
...	Generic	190.0	50		40		20		30

The visible period for this request is currently Submitted

Proposed Hours - Pending Approval = 20.0 hours
Period Status: Submitted

3. MODIFY A SUBMITTED REQUEST FOR GENERIC RESOURCES

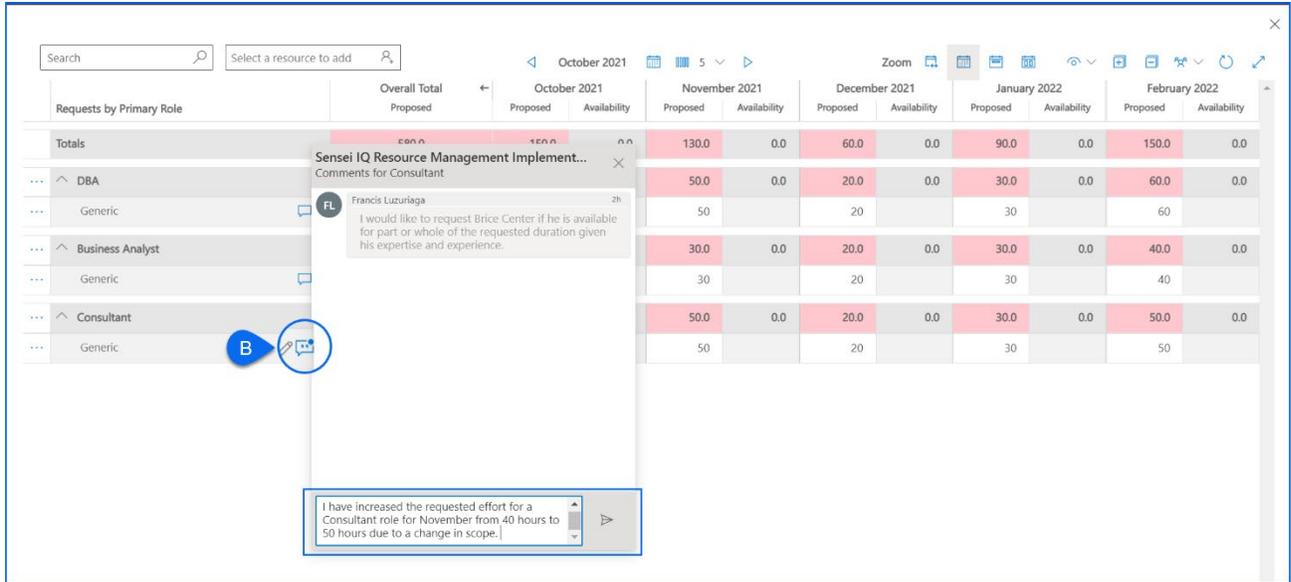
- a. From the **Resource Plan** tab, locate the generic resource role row you want to update and modify the proposed hours for the visible period in the **Proposed** column.

Requests by Primary Role		Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
			Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals		580.0	150.0	0.0	130.0	0.0	60.0	0.0	90.0	0.0	150.0	0.0
...	^ DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
...	Generic	220.0	60		50		20		30		60	
...	^ Business Analyst	160.0	40.0	0.0	30.0	0.0	20.0	0.0	30.0	0.0	40.0	0.0
...	Generic	160.0	40		30		20		30		40	
...	^ Consultant	200.0	50.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0
...	Generic	200.0	50		50		20		30		50	

Proposed Hours = 50.0 hours
Period Status: Draft

Tip: At this point of the resource request process, the status of your proposed hours for the modified resource request reverts to **Draft**.

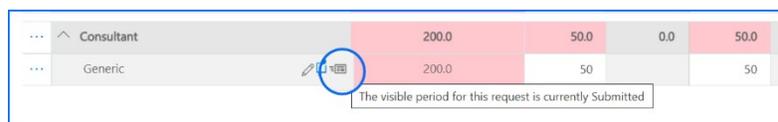
- b. Attach **comments** to the modified resource request for the line managers processing your requests (**recommended**).



- c. Click the **Row Menu** button (...) in front of the generic resource role row to view more options.
- d. Click **Submit** to send the changes applied to the resource request for the visible periods.



Tip: At this point of the resource request process, the status of your proposed hours for the modified resource request changes to **Submitted**.



- e. Finally, click the **Save** button to keep the changes to the resource request.

Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	580.0	150.0	0.0	130.0	0.0	60.0	0.0	90.0	0.0	150.0	0.0
DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Generic	220.0	60		50		20		30		60	
Business Analyst	160.0	40.0	0.0	30.0	0.0	20.0	0.0	30.0	0.0	40.0	0.0
Generic	160.0	40		30		20		30		40	
Consultant	200.0	50.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0
Generic	200.0	50		50		20		30		50	

Submit a request for named resources

Project Manager **Project > Leadership > Projects > Resources > Resource Plan**

1. SET THE RESOURCE DEMAND HORIZON

- a. Ensure you are in the **Project** area and click **Projects** in the **Leadership** section.
- b. Open the project record then expand the **Resource** segment and navigate to the **Resource Plan** tab.

- c. Follow the same steps described in the **Submit a request for generic resources** section above.

2. CREATE AND SUBMIT A REQUEST FOR NAMED RESOURCES

- a. Click the **Add Resource to Plan** button to search and select the named resources to add to your project individually.

Requests by Primary Role	Primary Role	Total Available Hours
CO	Process Engineer	802.5 hrs
CT	Chris Thomas Procurement Specialist	802.5 hrs
CP	Cindy Process Product Tester	802.5 hrs
CC	Connie Campaign Marketing	802.5 hrs
C	Consultant Generic	802.5 hrs
CC	Craig Counsell Business Analyst	802.5 hrs
DM	Dan MacDonald Infrastructure Developer	802.5 hrs

Tip: Each named resource is assigned a primary role in Sensei IQ. The **primary role, full name, and total available hours** of the named resources with their **capacity in the visible periods** are displayed in the live search results.

- b. Once you have added all the named resources required in your project, enter the required effort in hours in the **Proposed** columns across the visible periods.

Requests by Primary Role	Overall Total Proposed	October 2021 Proposed	October 2021 Availability	November 2021 Proposed	November 2021 Availability	December 2021 Proposed	December 2021 Availability	January 2022 Proposed	January 2022 Availability	February 2022 Proposed	February 2022 Availability
Totals	1,160.0	310.0	472.5	250.0	495.0	100.0	517.5	250.0	472.5	250.0	450.0
DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Project Manager	170.0	60.0	157.5	60.0	165.0	10.0	172.5	20.0	157.5	20.0	150.0
Carl Executive	170.0	60	157.5	60	165.0	10	172.5	20	157.5	20	150.0
Procurement Specialist	260.0	50.0	157.5	40.0	165.0	20.0	172.5	110.0	157.5	40.0	150.0
Chris Thomas	260.0	50	165.0	40.0	165.0	20	172.5	110	157.5	40	150.0
Business Analyst	310.0	90.0	0.0	30.0	172.5	60.0	157.5	80.0	150.0	0.0	150.0
Generic	160.0	40	0.0	20	0.0	30	0.0	40	0.0	0.0	150.0
Albert Connell	150.0	50	0.0	10	172.5	30	157.5	40	150.0	0.0	150.0
Consultant	200.0	50.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0	0.0	0.0
Generic	200.0	50	0.0	20	0.0	30	0.0	50	0.0	0.0	0.0

Tip: At this point of the resource request process, the page will display **Requests by Primary Role**, total capacity for each visible period in the **Availability** column, and **The Breakdown** of their capacity, committed hours (in the same project and other projects, if any), net proposed hours being requested in the project including the amount of days with capacity and percentage available for the visible period as a **tooltip text** when you hover the mouse over the **Proposed** column or **Availability** column.

The screenshot shows a resource request table with columns for months from October 2021 to February 2022. A tooltip is open for the resource 'Chris Thomas' in the November 2021 column, showing a breakdown of capacity and availability.

Requests by Primary Role	Overall Total Proposed	October 2021 Proposed	October 2021 Availability	November 2021 Proposed	November 2021 Availability	December 2021 Proposed	December 2021 Availability	January 2022 Proposed	January 2022 Availability	February 2022 Proposed	February 2022 Availability
Totals	1,160.0	310.0	472.5	250.0	495.0	100.0	517.5	250.0	472.5	250.0	450.0
DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Project Manager	170.0	60.0	157.5	60.0	165.0	10.0	172.5	20.0	157.5	20.0	150.0
Carl Executive	170.0	60	157.5	60	165.0	10	172.5	20	157.5	20	150.0
Procurement Specialist	260.0	50.0	157.5	40.0	165.0	20.0	172.5	110.0	157.5	40.0	150.0
Chris Thomas	260.0	50	157.5	40	165.0	20	172.5	110	157.5	40	150.0
Business Analyst	310.0	90.0	157.5	50.0	165.0	30.0	172.5	60.0	157.5	80.0	150.0
Generic	160.0	40	157.5	30	165.0	20	172.5	30	157.5	40	150.0
Albert Connell	150.0	50	157.5	20	165.0	10	172.5	30	157.5	40	150.0
Consultant	200.0	50.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0
Generic	200.0	50	0.0	50	0.0	20	0.0	30	0.0	50	0.0

Tooltip for Chris Thomas:
 Availability (Capacity minus all Committed hours on all projects) = 165.0 hours
 The Breakdown
 Capacity 165.0 hours
 Committed (elsewhere) - 0.0 hours
 Committed (here) - 0.0 hours
 Availability = 165.0 hours
 Days with capacity: 22 days
 Percentage available: 100%
 Period Status: Draft
 click the value to copy to Proposed.

c. Click the **Save** button to save your changes if you want to modify and submit your resource requests later.

This screenshot shows the same resource request table as above, but with the 'Save' button highlighted in blue at the bottom right. The tooltip is no longer visible.

Important: At this point of the resource request process, the status of your proposed hours is displayed as **Draft**.

This is a close-up of the tooltip for Chris Thomas, showing the 'Period Status' as 'Draft'.

Availability (Capacity minus all Committed hours on all projects)	= 157.5 hours
The Breakdown	
Capacity	157.5 hours
Committed (elsewhere)	- 0.0 hours
Committed (here)	- 0.0 hours
Availability	= 157.5 hours
Days with capacity:	21 days
Percentage available:	100%
Period Status:	Draft

d. Attach **comments** to each resource request for the line managers processing your requests (**recommended**).

The screenshot shows a resource request table with columns for months from October 2021 to February 2022, each with 'Proposed' and 'Availability' sub-columns. A popup window titled 'Sensei IQ Resource Management Implement...' is open over the row for 'Chris Thomas' under the 'Procurement Specialist' role. The popup contains the text: 'Comments for Chris Thomas' and 'I would like to request Chris Thomas please as he is already familiar with the project scope and he has capacity to work on this project.' The table data is as follows:

Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	1,160.0	310.0	472.5	250.0	495.0	100.0	517.5	250.0	472.5	250.0	450.0
DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Business Analyst	310.0	90.0	157.5	50.0	165.0	30.0	172.5	60.0	157.5	80.0	150.0
Generic	160.0	40		30		20		30		40	
Albert Connell	150.0	50	157.5	20	165.0	10	172.5	30	157.5	40	150.0
Consultant	200.0	50.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0
Generic	200.0	50		50		20		30		50	
Project Manager	170.0	60.0	157.5	60.0	165.0	10.0	172.5	20.0	157.5	20.0	150.0
Carl Executive	170.0	60	157.5	60	165.0	10	172.5	20	157.5	20	150.0
Procurement Specialist	260.0	50.0	157.5	40.0	165.0	20.0	172.5	110.0	157.5	40.0	150.0
Chris Thomas	260.0	50	157.5	40	165.0	20	172.5	110	157.5	40	150.0

Tip: You can click the **Row Menu** button (...) in front of the named resource role row to view more options such as **Change Resource** that allows you to replace the named resource in the request for the visible periods; **Open Resource** that allows you to view more information about the named resource; or **Remove Resource** to delete the resource request from the list individually.

This screenshot shows the same resource request table as above, but with the row menu for 'Chris Thomas' open. The menu options are: 'Open Resource', 'Submit', 'Change Resource', and 'Remove Resource'. The table data is as follows:

Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	1,160.0	310.0	472.5	250.0	495.0	100.0	517.5	250.0	472.5	250.0	450.0
DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Business Analyst	310.0	90.0	157.5	50.0	165.0	30.0	172.5	60.0	157.5	80.0	150.0
Generic	160.0	40		30		20		30		40	
Albert Connell	150.0	50	157.5	20	165.0	10	172.5	30	157.5	40	150.0
Consultant	200.0	50.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0
Generic	200.0	50		50		20		30		50	
Project Manager	170.0	60.0	157.5	60.0	165.0	10.0	172.5	20.0	157.5	20.0	150.0
Carl Executive	170.0	60	157.5	60	165.0	10	172.5	20	157.5	20	150.0
Procurement Specialist	260.0	50.0	157.5	40.0	165.0	20.0	172.5	110.0	157.5	40.0	150.0
Chris Thomas	260.0	50	157.5	40	165.0	20	172.5	110	157.5	40	150.0

Tip: You can click the **Primary Role Menu** button (...) in front of the primary resource role name to remove the primary role and its associated resource requests from the list.

Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	1,160.0	310.0	472.5	250.0	495.0	100.0	517.5	250.0	472.5	250.0	450.0
DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Business Analyst	310.0	90.0	157.5	50.0	165.0	30.0	172.5	60.0	157.5	80.0	150.0
Generic	160.0	40		30		20		30		40	
Albert Connell	150.0	50	157.5	20	165.0	10	172.5	30	157.5	40	150.0
Consultant	200.0	50.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0
Generic	200.0	50		50		20		30		50	
Project Manager	170.0	60.0	157.5	60.0	165.0	10.0	172.5	20.0	157.5	20.0	150.0
Carl Executive	170.0	60	157.5	60	165.0	10	172.5	20	157.5	20	150.0
Procurement Specialist	260.0	50.0	157.5	40.0	165.0	20.0	172.5	110.0	157.5	40.0	150.0
Remove Role	260.0	50	157.5	40	165.0	20	172.5	110	157.5	40	150.0

Important: Proposed hours recorded in all visible periods displayed on the page are submitted by default. If you want to control the period to be included in your resource requests (e.g., from 5 months to only 3 months), apply the appropriate fixed value for the number of **periods** you want to remain visible on the page before you click **Submit and Save**.

Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	1,160.0	310.0	472.5	250.0	495.0	100.0	517.5	250.0	472.5	250.0	450.0
DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Business Analyst	310.0	90.0	157.5	50.0	165.0	30.0	172.5	60.0	157.5	80.0	150.0
Generic	160.0	40		30		20		30		40	
Albert Connell	150.0	50	157.5	20	165.0	10	172.5	30	157.5	40	150.0
Consultant	200.0	50.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0
Generic	200.0	50		50		20		30		50	
Project Manager	170.0	60.0	157.5	60.0	165.0	10.0	172.5	20.0	157.5	20.0	150.0
Carl Executive	170.0	60	157.5	60	165.0	10	172.5	20	157.5	20	150.0
Procurement Specialist	260.0	50.0	157.5	40.0	165.0	20.0	172.5	110.0	157.5	40.0	150.0
Remove Role	260.0	50	157.5	40	165.0	20	172.5	110	157.5	40	150.0

- e. Once you have created the request for named resources for the project, click the **Submit and Save** button to formally submit all resource requests for the visible periods.

Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
		Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	1,160.0	310.0	472.5	250.0	495.0	100.0	517.5	250.0	472.5	250.0	450.0
DBA	220.0	60.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	60.0	0.0
Project Manager	170.0	60.0	157.5	60.0	165.0	10.0	172.5	20.0	157.5	20.0	150.0
Carl Executive	170.0	60	157.5	60	165.0	10	172.5	20	157.5	20	150.0
Procurement Specialist	260.0	50.0	157.5	40.0	165.0	20.0	172.5	110.0	157.5	40.0	150.0
Chris Thomas	260.0	50	157.5	40	165.0	20	172.5	110	157.5	40	150.0
Business Analyst	310.0	90.0	157.5	50.0	165.0	30.0	172.5	60.0	157.5	80.0	150.0
Generic	160.0	40		30		20		30		40	
Albert Connell	150.0	50	157.5	20	165.0	10	172.5	30	157.5	40	150.0
Consultant	200.0	50.0	0.0	50.0	0.0	20.0	0.0	30.0	0.0	50.0	0.0
Generic	200.0	50		50		20		30		50	

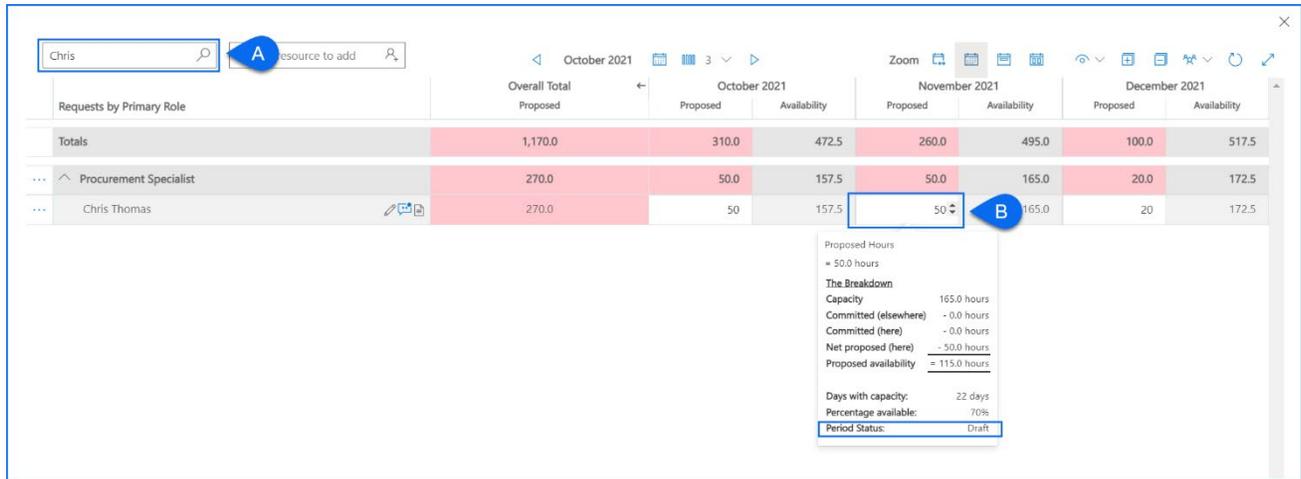
Tip: At this point of the resource request process, the status of your proposed hours (with attached comments) is displayed as **Submitted** and the cells they are contained in are highlighted in **red** denoting that the hours are not yet committed. The line managers can now review and process your resource requests from the **Resource Demand** dashboard in Sensei IQ.

Procurement Specialist	260.0	50.0	157.5	40.0
Chris Thomas	260.0	50	157.5	40

The visible period for this request is currently Submitted

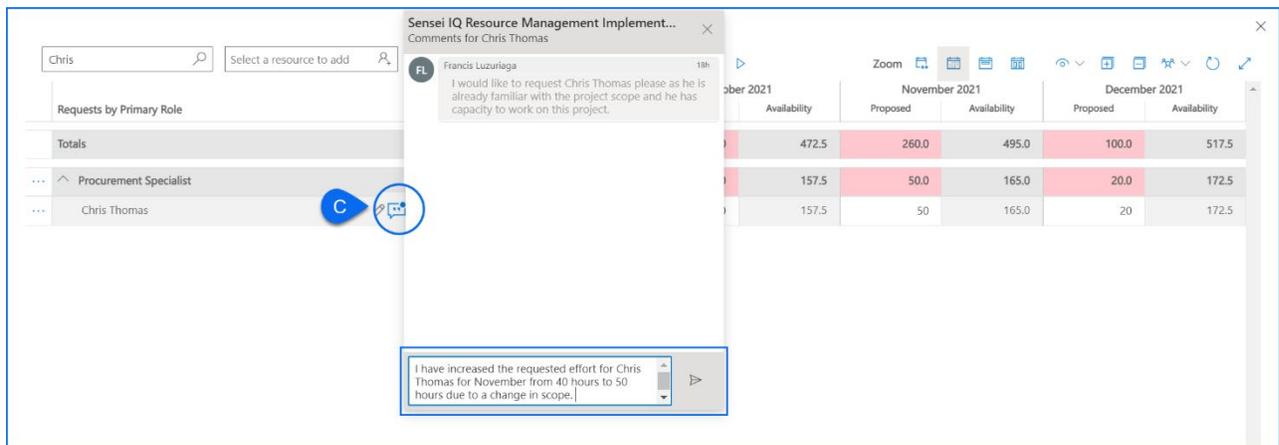
3. MODIFY A SUBMITTED REQUEST FOR NAMED RESOURCES

- a. From the **Resource Plan** tab, locate the named resource row you want to update using the **Search** field.
- b. Modify the proposed hours for the visible period in the **Proposed** column.



Tip: At this point of the resource request process, the status of your proposed hours for the modified resource request reverts to **Draft**.

- c. Attach **comments** to the modified resource request for the line managers processing your requests (**recommended**).



- d. Click the **Row Menu** button (...) in front of the named resource row to view more options.
- e. Click **Submit** to send the changes applied to the resource request for the visible periods.

Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021	
		Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	1,170.0	310.0	472.5	260.0	495.0	100.0	517.5
Procurement Specialist	270.0	50.0	157.5	50.0	165.0	20.0	172.5
Chris Thomas	270.0	50	157.5	50	165.0	20	172.5

Tip: At this point of the resource request process, the status of your proposed hours for the modified resource request changes to **Submitted**.

Chris Thomas	270.0	50	157.5	50
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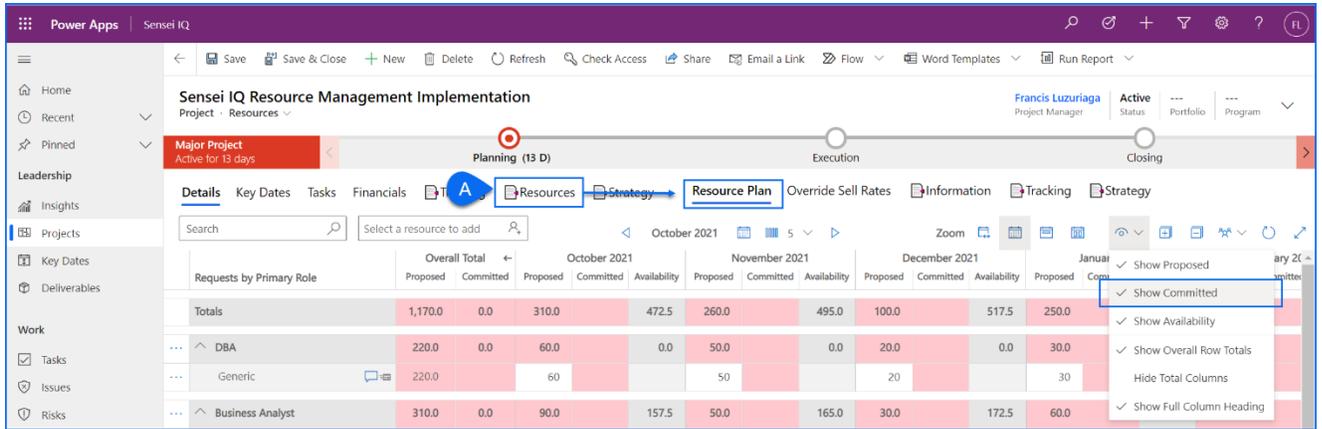
The visible period for this request is currently Submitted

f. Finally, click the **Save** button to keep the changes to the resource request.

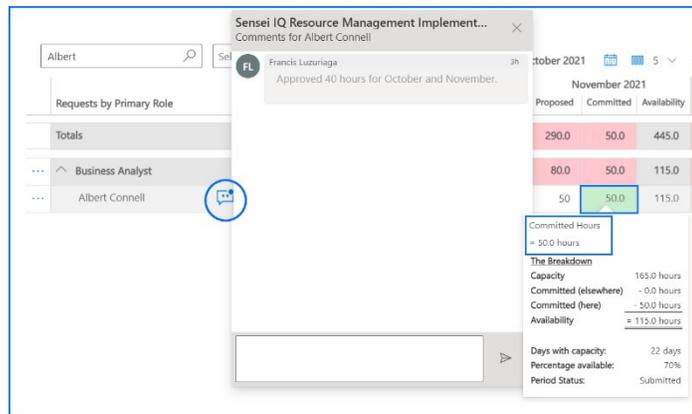
Requests by Primary Role	Overall Total Proposed	October 2021		November 2021		December 2021	
		Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	1,170.0	310.0	472.5	260.0	495.0	100.0	517.5
Procurement Specialist	270.0	50.0	157.5	50.0	165.0	20.0	172.5
Chris Thomas	270.0	50	157.5	50	165.0	20	172.5

4. MODIFY AN EXISTING COMMITTED WORK FOR NAMED RESOURCES

- a. Expand the **Resources** segment then click the **Resource Plan** tab and add **Show Committed** from the **View Options** menu.



Tip: The approved resource allocation (with attached comments) is displayed in the **Committed** column as *read-only* and the cells they are contained in are highlighted in **green** denoting the committed hours fulfilled by the line manager is equal to the proposed hours for the period requested. Otherwise, the cells they are contained in would be highlighted **red** denoting that the committed hours fulfilled by the line manager is either less or more than the proposed hours for the period requested.



- b. Locate the named resource row with committed work that you want to update using the **Search** field.
- c. Modify the proposed hours for the visible periods using the **Proposed** column.

The screenshot shows a resource request table with columns for months from October 2021 to February 2022. Each month has sub-columns for Proposed, Committed, and Availability. A search bar at the top left contains 'Albert'. A blue circle 'B' highlights the 'resource to add' dropdown. A blue circle 'C' highlights the '60' value entered in the 'Proposed' column for Albert Connell in October 2021.

Requests by Primary Role	Overall Total			October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
Totals	1,170.0	100.0	422.5	310.0	50.0	107.5	260.0	50.0	445.0	100.0	517.5	250.0	472.5	250.0	450.0	250.0	450.0	450.0
Business Analyst	310.0	100.0	107.5	90.0	50.0	107.5	50.0	50.0	115.0	30.0	172.5	60.0	157.5	80.0	150.0	80.0	150.0	150.0
Albert Connell	150.0	100.0	107.5	50	50.0	107.5	20	50.0	115.0	10	172.5	30	157.5	40	150.0	40	150.0	150.0
Business Analyst	320.0	100.0	107.5	100.0	50.0	107.5	50.0	50.0	115.0	30.0	172.5	60.0	157.5	80.0	150.0	80.0	150.0	150.0
Albert Connell	160.0	100.0	107.5	60	50.0	107.5	20	50.0	115.0	10	172.5	30	157.5	40	150.0	40	150.0	150.0

Tip: At this point of the resource request process, the status of your modified proposed hours in the visible period for the previously approved resource request reverts to **Draft**.

The screenshot shows the same resource request table as above, but with a tooltip open over the '50.0' committed hours for Albert Connell in October 2021. The tooltip displays the following information:

- Committed Hours = 50.0 hours
- The Breakdown**
- Capacity = 157.5 hours
- Committed (elsewhere) = - 0.0 hours
- Committed (here) = - 50.0 hours
- Availability = 107.5 hours
- Days with capacity: 21 days
- Percentage available: 68%
- Period Status: **Draft**

d. Attach **comments** to the modified resource request for the line managers processing your requests (**recommended**).

The screenshot shows the resource request table with a comment box open for Albert Connell. The comment box contains the following text:

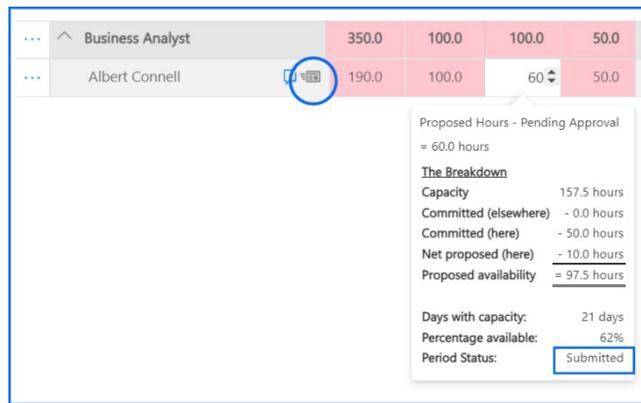
Requesting an increase in the committed work of Albert from 40 to 60 hours due to the increase in scope.

e. Click the **Row Menu** button (...) in front of the named resource role row that you updated to view more options.

f. Click **Submit** to send the changes applied to the resource request for the visible periods.



Tip: At this point of the resource request process, the status of the proposed hours for the modified resource request changes to **Submitted**.



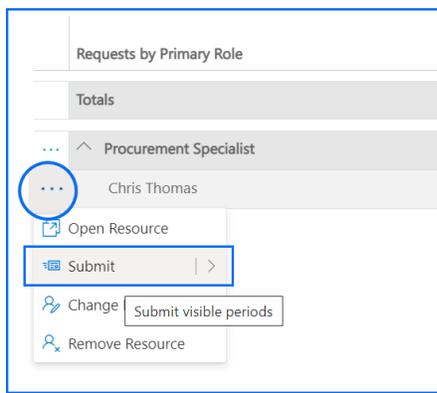
g. Finally, click the **Save** button to keep the changes to the resource request.



Important: There are four (4) methods to submit your requests for generic and/or named resources depending on the set fixed number of **periods** visible on the page.

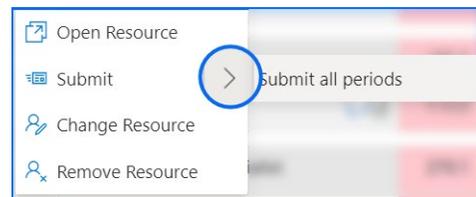
#1

Click the **Row Menu** button (...) in front of the resource row to view the **Submit** option to submit proposed hours for each resource request across all **visible periods** displayed on the page individually.



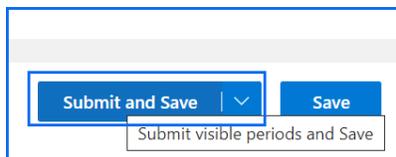
#2

Click the **chevron arrow** next to the **Submit** button to view the **Submit all periods** option to submit proposed hours for each resource request across **all periods** that contain proposed hours for that single row whether **visible** or **not displayed** on the page individually.



#3

Click the **Submit and Save** button at the bottom of the form to submit proposed hours for resource requests across all **visible periods** displayed on the page in bulk.



#4

Click the **chevron arrow** next to the **Submit and Save** button and select **Submit all periods and Save** at the bottom of the form to submit proposed hours for resource requests across **all periods** that contain proposed hours whether **visible** or **not displayed** on the page in bulk.



Note: If Resource Approval Notifications Flows are enabled in your organization’s Sensei IQ solution, both the line manager and project manager are notified when resource requests are created, fulfilled and/or modified later.