

Overview

This Job Aid defines the steps to follow when defining the resource plan for new project proposals in Sensei IQ.

Project governance includes project intake and prioritization to ensure that all projects are approved before work takes place, and more importantly, that only appropriately selected projects are approved.

Typically, new project proposals are submitted with a business case, cost estimates, resource plan, and strategic impact assessments. Each project proposal is typically subjected to a governance workflow that guides the approval process.

At this point in the project proposal process, the project requester creates a resource plan when it is known which resource roles are required to support the proposed project and there is a need to justify the demand of work from those resource roles for a given time. Once the project proposal is selected and promoted to an approved project, this resource plan moves to the project record. Once it is converted to the project record, the project manager submits a request for resources and their proposed hours to be formally committed to the project. The request is then routed to the appropriate resource manager for review and approval.

Define proposal resource requirements

Project Requester

Portfolio > Intake > Proposals > Resource Plan

1. SET THE RESOURCE DEMAND HORIZON

- a. Ensure you are in the **Portfolio** area and click **Proposals** in the **Intake** section.
- b. Open the proposal record and navigate to the **Resource Plan** tab.

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



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

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

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

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

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2. ADD A RESOURCE PLAN TO THE PROJECT PROPOSAL

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

Search $ ho$	Consultant		Octobe	r 2021 🛗 🗰 5 🚿		Zoom 🛄 🛅 🖻	iii	
	Suggested resources		Overall Total ←	October 2021	November 2021	December 2021	January 2022	February 2022
Requests by Primary Role	Brice Center Consultant	802.5 hrs	Proposed	Proposed	Proposed	Proposed	Proposed	Proposed
Totals	Consultant Generic		0.0					
	Eddie Mason		0.0					
Generic	Consultant	802.5 hrs	0.0					
	Consultant	802.5 hrs						
∧ DBA	Francis Luzuriaga		0.0					
Generic	Consultant	802.5 hrs	0.0					
	Jason Huebner Consultant	802.5 hrs						
	Nancy Portfolio	802.5 hrs 💌						



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

[Search $ ho$	Select a resource to add R	Octobe	er 2021 🛗 💷 5	~ Þ	Zoom 🗔 🛅 🗐	🖬 ov 🗗		>
	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	1
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b. Once you have added all the generic resource roles required in your proposal, enter the required effort in hours in the **Proposed** columns across the visible periods.

Search $ ho$ Select a resource to add $ ho_*$	Octobe	er 2021 🛗 💵 5 🗸		Zoom 🛱 🛅 🖻	iii	
Requests by Primary Role	Overall Total ← Proposed	October 2021 Proposed	November 2021 Proposed	December 2021 Proposed	January 2022 Proposed	February 2022 Proposed
Totals	330.0	120.0	90.0	30.0	50.0	40.0
···	150.0 B	40.0	40.0	20.0	30.0	20.0
Generic 🖉 🗎	150.0	40	40 🗘	20	30	20
·· DBA	100.0	50.0	Proposed Hours 1.0	10.0	0.0	10.0
Generic 🖉 🗎	100.0	50	Period Status: Draft 30	10	0	10
···	80.0	30.0	20.0	0.0	20.0	10.0
·· Generic 🖉 🗎	80.0	30	20	0	20	10

c. Attach **comments** to each resource request for the resource managers allocating the resources once the proposal becomes an approved project. (**recommended**).

Requests by Primary Role		Overall Total ← Proposed	October 2021 Proposed	November 2021 Proposed	December 2021 Proposed	January 2022 Proposed	February 2022 Proposed
Totals		Resource Management Implementati	ion Pron	90.0	30.0	50.0	40
△ Consultant		Comments for Business Analyst	0	20.0	0.0	20.0	10
Generic	F		0	20	0	20	
△ DBA			o	30.0	10.0	0.0	1
Generic	F		0	30	10	0	
△ Business Analyst			0	40.0	20.0	30.0	2
Generic	C	1)	0	40	20	30	

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d. Click the Save button to save your changes to the resource plan attached to your project proposal submission.

	Search , P Select	a resource to add 🛛 🗛	Octobe	ar 2021 🛗 🛄 5 🕚	✓ ▶	Zoom 🛱 🛅 🛅	iii	
	Requests by Primary Role		Overall Total ← Proposed	October 2021 Proposed	November 2021 Proposed	December 2021 Proposed	January 2022 Proposed	February 2022 Proposed
	Totals		330.0	120.0	90.0	30.0	50.0	40.0
	△ Consultant		80.0	30.0	20.0	0.0	20.0	10.0
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	△ DBA		100.0	50.0	30.0	10.0	0.0	10.0
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4								•
								Save Cancel

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

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	Proposed Hours = 40.0 hours
	Period Status: Draft

Tip: You can click the **Row Menu** button (...) in front of the generic resource role row to view more options such as **Change Resource** that allows you to replace the generic resource role in the resource plan; or **Remove Resource** to delete the resource request from the resource plan individually.

Demoste ha Deimon Dela		Overall Total ←	October 2021	November 2021	December 2021	January 2022	February 2022
Requests by Primary Role		Proposed	Proposed	Proposed	Proposeu	Proposed	Floposed
Totals		330.0	120.0	90.0	30.0	50.0	40.0
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Generic		80.0	30	20	0	20	10
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Generic		100.0	50	30	10	0	10
- A Business Analyst		150.0	40.0	40.0	20.0	30.0	20.0
Generic	/ 🕫 B	150.0	40	40	20	30	20
Open Resource							
Change Resource							

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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 resource plan.

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Requests by Primary Role		Overall Total ← Proposed	October 2021 Proposed	November 2021 Proposed	December 2021 Proposed	January 2022 Proposed	February 2022 Proposed
Totals		330.0	120.0	90.0	30.0	50.0	40.0
···		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		150.0	40.0	40.0	20.0	30.0	20.0
Remove Role	000	150.0	40	40	20	30	20

Important: The resource plan attached to a proposal record cannot be submitted for review and approval by resource managers until the proposal becomes an approved project. Once the project proposal is selected and promoted to an approved project, this resource plan moves to the project record where the proposed hours can be adjusted and submitted for approval. The request is then routed to the appropriate resource manager for review and approval. The **committed work** allocated to each requested resource in the resource plan is displayed in the **Resource** tab of the approved project when accessed in the **Project** area of Sensei IQ. Once a proposal is promoted to a project, a summary of the resource plan is recorded against the proposal only through the **History** tab.