

Overview

This Job Aid defines the steps to follow when processing the resource requests for projects in Sensei IQ.

Work resources have defined availability and may have their time scheduled by a line manager in your organization When a project manager submits a request for resources to support an approved project, the request is routed to the appropriate line managers for review and approval. If Resource Approval Notifications Flows are enabled in your organization's Sensei IQ solution, the appropriate line managers are notified when requests for their resources are submitted.

Depending on your organizational rules, line managers are typically required to approve the resource commitments before the execution of any work across approved projects. 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.

Using the **Resource Demand** page in Sensei IQ, you can respond to each pending resource request from approved projects in the following ways:

- 1. Approve a request for named resources using Autofill
- 2. Modify and approve a request for named resources
- 3. Fulfill a submitted request for generic resources

Important: The **Resource Demand** view in Sensei IQ has a default filter to allows users to manage the demand for resources that they are the line manager for. The filter can be modified or removed temporarily or permanently if your organization requires you to view all resources.

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Approve a request for named resources

Resource Manager

Resources > Resources > Resource Demand

1. SET THE RESOURCE DEMAND HORIZON

a. Ensure that you are in the **Resources** area and click **Resource Demand** in the **Resources** section.

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b. Change the selected **date** for the first period that you want to process resource requests from.

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

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Important: If you opt to use the **Autofill** functionality, committed hours recorded in all visible periods displayed on the page are automatically populated 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 **Autofill** button later.

d. Set the **timescale** of the period that you want to process resource requests from using the **Zoom** feature.

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

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f. Enable the Toggle Full Screen Mode option to switch the Resource Demand screen to focus mode.

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g. Apply either the **Requests by Project** or **Requests by Resource** view using the **Grouping** menu depending on your preferred method of processing the requests.

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h. Click the Expand All button to display the second level of rows outlining the project/s under each named resource row.

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2. REVIEW AND APPROVE A REQUEST FOR NAMED RESOURCES USING AUTOFILL

a. Select a named resource row and review the **attached comments** on each request from the project manager individually.

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b. Hide the comments and evaluate the remaining availability of the named resource individually in the **Availability** column or the **tooltip text** when you hover the mouse over each visible period.

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Tip: If you want to further understand the allocation of the selected named resource across other projects, you can click the **Primary Role Menu** button (...) in front of the primary resource role name and then the **Open Resource** button to access the **Allocation** tab of the named resource in a separate window.



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Tip: If you want to further understand the allocation of the named resources across a particular project, you can click the **Row Menu** button (...) in front of the project name and then the **Open Project** button to access the **Resource Plan** tab of the selected project in a separate window.

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同	Search ,O Select a	resource to ad	d R			٥	October 202	1 🛅 🛙	II 5 ∨	⊳		Ze	oom 🗔	a a		· ~ 🖻	∃ * ∨	02
٢	Requests by Primary Role	Overall Proposed	Total ← Committed F	Octo Proposed Co	ober 2021	Availability	No	vember 202 Committed	1 Availability	D Proposed	ecember 202 Committed	1 Availability	Proposed	January 2022 Committed	Availability	Proposed	February 2022 Committed	Availability
8	Totals	1,210.0	100.0	320.0	50.0	422.5	290.0	50.0	445.0	100.0		517.5	250.0		472.5	250.0		450.0
0	^ DBA	220.0	0.0	60.0		0.0	50.0		0.0	20.0		0.0	30.0		0.0	60.0		0.0
ž.	Generic 🖵 🕫	220.0		60			50			20			30			60		
କ	··· A Business Analyst	350.0	100.0	100.0	50.0	107.5	80.0	50.0	115.0	30.0		172.5	60.0		157.5	80.0		150.0
0	··· Generic 💭 📾	160.0		40			30			20			30			40		
(83)	Albert Connell 🖂 📾	190.0	100.0	60	50.0	107.5	50	50.0	115.0	10		172.5	30		157.5	40		150.0
	···	200.0	0.0	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	0.0	60.0		157.5	60.0		165.0	10.0		172.5	20.0		157.5	20.0		150.0
	··· Carl Executive	170.0	0.0	60		157.5	60		165.0	10		172.5	20		157.5	20		150.0
	···	270.0	0.0	50.0		157.5	50.0		165.0	20.0		172.5	110.0		157.5	40.0		150.0

c. Once you have decided to fulfill the demand based on the proposed work without any amendment, click the Row Menu button (...) in front of the project name and then the Autofill button to automatically fill the Committed cells with the proposed hours submitted (also referred to as unfulfilled submissions) against the selected project row for the visible periods only.

	Requests by Resource	O ^r Propos	erall Total ← d Committed	Proposed	October 202 Committed	1 Availability	N Proposed	lovember 20 Committed	21 Availability	D Proposed	December 2021 Committed Availal	bility	Proposed	anuary 2022 Committed	2 Availability	Proposed	February 202 Committed	2 Availabi
	Totals	590.0	100.0	170.0	50.0	422.5	160.0	50.0	445.0	40.0	51	7.5	140.0		472.5	80.0		450.
	△ Albert Connell	190.0	100.0	60.0	50.0	107.5	50.0	50.0	115.0	10.0	173	2.5	30.0		157.5	40.0		150
•	Sensei IQ Resource M 📴	a 190.0	100.0	60.0	50		50.0	50		10.0			30.0			40.0		
•	△ Carl Executive	130.0	0.0	60.0		157.5	60.0		165.0	10.0	17.	2.5			157.5			150
•	Sensei IQ Resource M	a 130 .0	0.0	60.0			60.0			10.0								
	△ Chris Thomas	270.0	0.0	50.0		157.5	50.0		165.0	20.0	173	2.5	110.0		157.5	40.0		150
	Sensei IO Resource M	270.0	0.0	50.0			50.0			20.0			110.0			40.0		



Tip: If you want to automatically fill the **Committed** cells with the proposed hours submitted (also referred to as **unfulfilled submissions**) against <u>all</u> pending requests from <u>all</u> project rows for the visible periods on the **Resource Demand** page **without** any amendment, you can click the **Autofill** button at the bottom of the page instead.



Important: At this point of the resource request approval process, the approved resource allocation (also referred to as **committed work**) is displayed in the **Committed** column as *read-write* and the cells the **Proposed** hours 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.

Search D			4	October	2021] 1001 5	~ >				Zoom				/ I= ~	= =	× U Z
Paquets by Pacourse	Overa	Il Total ←	Proposed	October 202	1 Availability	Proposed	ovember 20	21 Availability	D	ecember 20	21 Availability	Proposed	January 202	2 Availability	Proposed	February 20	Availabilit
Requests by Resource	Troposed	committee	Troposed	committed	ritaliability	Toposed	committee	ritunaomity	Topoocu	committee	ritanability	rioposed	commeted	ritaliability	rieposed	commeteo	rivenuoling
··· 🛆 Chris Thomas	270.0	270.0	50.0	50.0	107.5	50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110.0
··· Sensei IQ Resource M ∥🖽 ✓	270.0	270.0	50.0	50		50.0 =	⇒ 50		20.0	20		110.0	110		40.0		

- d. Attach **comments** to each fulfilled resource request to provide contextual information to the respective project managers (**recommended**).
- e. Once you have completed the approval process, click the **Save** button to keep the changes.

Involvement Proposed Connecting Proposed	Currentiation Currentiation<	Search D	Querry!! Tetral	4	October 2021	0 000 5	< D	-1			Zoom				< III ~	🕀 🖃	0
Totals Sensel IQ Resource Management Inplement 1600 1000 395.0 40.0 200 497.5 140.0 1100 362.5 80.0 40.0 410 Albert Connell Sensel IQ Resource M Image: Im	Totals Totals<	Requests by Resource	Proposed Commit	ted Proposed	Committed Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Z Availabil
Albert Connell Comments for Chris Thomas Gard Executive Sono S100 S1	Albert Connell Comments for Chris Inthis project have being and request. 500 500 500 1150 100 1725 300 157.5 40.0 157.5	Totals	Sensei IQ Resource I	Anagement	100.0 272 E Implement V	160.0	100.0	395.0	40.0	20.0	497.5	140.0	110.0	362.5	80.0	40.0	410.0
Sensel IQ Resource M Image law line project. 500 50 100 300 400 1150 Carl Executive Findic lauriling 000 165.0 100 172.5 Image 100 <td>Sensei IQ Resource M Image: Laurainga or r Marcely Laurainga or request Chris Thomas Sensei IQ Resource M Sensei IQ Resource M Image: Laurainga or r Marcely Laurainga or r Image: Laurainga or r Marcely Laurai</td> <td>△ Albert Connell</td> <td>Comments for Chris The</td> <td>mas</td> <td></td> <td>50.0</td> <td>50.0</td> <td>115.0</td> <td>10.0</td> <td></td> <td>172.5</td> <td>30.0</td> <td></td> <td>157.5</td> <td>40.0</td> <td></td> <td>150.0</td>	Sensei IQ Resource M Image: Laurainga or r Marcely Laurainga or request Chris Thomas Sensei IQ Resource M Sensei IQ Resource M Image: Laurainga or r Marcely Laurainga or r Image: Laurainga or r Marcely Laurai	△ Albert Connell	Comments for Chris The	mas		50.0	50.0	115.0	10.0		172.5	30.0		157.5	40.0		150.0
▲ Card Executive appoint/10 work not this project. 000 165.0 10.0 172.5 157.5 150.0 150.	Carl Executive Sensel IQ Resource M	Sensei IQ Resource M	Francis Luzuriaga	equest Chris Th	oct 7 iomas please as he is t scope and he has	50.0	50		10.0			30.0			40.0		
Sensel IQ Resource M Image in accurate the requested effort for Chris in this project have 60.0 10.0 Image in accurate the requested effort for Chris in this project have 60.0 50.0 50.0 150.0 20.0 152.5 110.0 110.0 47.5 40.0 40.0 110.0 Sensel IQ Resour Image in accord For accord 50.0 50.0 150.0 20.0 20.0 110.0 110.0 47.5 40.0	Sensei IQ Resource M Image in scope. 60.0 10.0 Image in scope. 10.0 Image in scope. <td>△ Carl Executive</td> <td>capacity to wo</td> <td>k on this project</td> <td>t.</td> <td>60.0</td> <td></td> <td>165.0</td> <td>10.0</td> <td></td> <td>172.5</td> <td></td> <td></td> <td>157.5</td> <td></td> <td></td> <td>150.</td>	△ Carl Executive	capacity to wo	k on this project	t.	60.0		165.0	10.0		172.5			157.5			150.
Chris Thomas Thomas for November from 40 hours to 50 hours 500 500 1150 200 152.5 1100 1100 47.5 400 400 110 Sensei IQ Resour Image in scope. 500 50 50 200 20 1100 110 400 <	Chris Thomas Thomas for November from 40 hours to 30 hours Sensei IQ Resour Image: In scope. July Laboratory Solution Sensei IQ Resour Image: In scope. July Laboratory Solution All proposed work for Chris in this project have been approved without any amendment from Image: Interpret the original request.	Sensei IQ Resource M	Francis Luzuriaga	d the requested	Oct 8 effort for Chris	60.0			10.0								
Sensei IQ Resour 0 50 50 200 20 110 110 400 40	Sensei IQ Resour D 20 20 110. 110 40.0 40	△ Chris Thomas	due to a chang	vember from 40 e in scope.	hours to 50 hours	50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110.
All proposed work for Chris in this project have been approved without any amendment from the original request.	All proposed work for Chris in this project have been approved without any amendment from the original request.	Sensei IQ Resour				50.0	50		20.0	20		110.0	110		40.0	40	

Tip: Clicking the Cancel button will discard the changes applied to the page.



Tip: The status of both proposed and committed hours (with attached comments) is displayed as **Approved** when you hover the mouse over the approved hours in the **Proposed** cell or **Committed** cell respectively.

Search 🔎			4	Octobe	r 2021 🛅	0 00 5	~ D				Zoom	C			~ ≣ ~		02
	Overa	all Total ←		October 202	1	N	lovember 20	21	0	December 20	21		January 20	22		February 20	22
Requests by Resource	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committee	Availability	Proposed	Committed	Availability
 △ Chris Thomas	270.0	270.0	50.0	50.0	107.5	50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110.0
 Sensei IQ Resource M 🖾 🗸	270.0	270.0	50.0	50		50,0	50 \$		20.0	20		110.0	110		40.0	40	
	Proposed Hi = 50.0 hours Period Statu D click the v period (avail	ours Approved value to copy to ability permitti	o committed a	and \checkmark approv	e this	= 50. Peric	mitted Hours 0 hours od Status: Appl	roved									

Tip: The adjusted remaining availability for each visible period is displayed in the **Availability** column and in the tooltip text when you hover the mouse over the availability hours in the **Availability** cell.

Search ,0				Zoom		×≣×∎∎02
	Overall Total	⊢ October 2021 November	er 2021	December 2021	January 2022	February 2022
Requests by Resource	Proposed Committe	d Proposed Committed Availability Proposed Comm	tted Availability Propo	posed Committed Availability	Proposed Committed Availability	Proposed Committed Availability
···	270.0 0.0	50.0 157.5 50.0	165.0 2	20.0 172.5	110.0 157.5	40.0 150.0
Sensei IQ Resource M 📮 📼	270.0 0.0	Availability (Capacity minus all ted hours on all projects) 2	20.0	110.0	40.0
		The Breakdown Capacity 157.5 hours Committed -0.0 hours Availability = 157.5 hours Days with capacity: 21 days Percentage availabile: 100% Period Status: Submitted In this case the availability if or the specific resource: Christ Thomas. Note: This number does not count any resources assigned to fulfil this resource's requests.				
						×

Search ,			٩	October	2021 🛅	1000 5	~ >				Zoom	a m]	∕ ≣ ∨	⊕ ⊟	02
	Overal	l Total ←		October 2021	1	N	lovember 20	21	D	ecember 202	21		January 202	2	F	February 202	2
Requests by Resource	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
 △ Chris Thomas	270.0	270.0	50.0	50.0	107.5	50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110.0
 Sensei IQ Resource M 🛛 🖾 🗸	270.0	270.0	Availability (C	apacity minus	ante	d hours on al	l projects)		20.0	20	\smile	110.0	110	\smile	40.0	40	\smile
			The Breakdow Capacity Committed Availability Days with cap Percentage an Period Status In this case th Chris Thoma: Note: This nu fulfil this reso	m 157. - 50. = 107. vailable: : Ap the availability is s. mber does not urce's requests	5 hours 10 hours 15 hours 21 days 68% pproved a for the speci t count any re 8.	ific resource: esources assig	aned to										



Modify and approve a request for named resources

👗 🛛 Resource Manager

⁹ Resources > Resources > Resource Demand

1. SET THE RESOURCE DEMAND HORIZON

a. Ensure that you are in the **Resources** area and click **Resource Demand** in the **Resources** section.

=	\leftarrow	🐼 Show Chart 🕂 New 🗊 Dele	te 🗸	🕐 Refresh	🕱 Emai	la Link	Flo	w ~ [Run Repo	ort 🗸 🛙	Export to	Excel ~	💐 Imp	oort from Ex	cel ~	Create	view :	
යි Home		Resource Demand \sim																\bigtriangledown
S Recent ✓		Search , P			 0 	ctober 2021	i 01	5 ~	D			Zoom	C	= 6		/≣ ~	Ð	0.
Resources		Requests by Resource	Overa Proposed	Il Total ← Committed	Proposed	October 202 Committed	1 Availability	N Proposed	ovember 20 Committed	21 Availability	De Proposed	cember 202 Committed	21 Availability	Proposed	January 202 Committed	2 Availability	F Proposed	ebruary 2 Committe
a Insights		Totals	590.0	100.0	170.0	50.0	422.5	160.0	50.0	445.0	40.0		517.5	140.0		472.5	80.0	
Enterprise Calendars		✓ Albert Connell	190.0	100.0	60.0	50.0	107.5	50.0	50.0	115.0	10.0		172.5	30.0		157.5	40.0	
Resource Demand	<	A Carl Executive	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5		
Availability Heatmap	••••		270.0	0.0	50.0		157.5	50.0		165.0	20.0		172.5	110.0		157.5	40.0	
(nowledge ⑦ Training ⑧ What's New																		
	•		-			-			-	-	-				Autofill	3		Cancel

b. Follow the same steps described in the **Approve a request for named resources** section above.

2. MODIFY THEN FULFILL A REQUEST FOR NAMED RESOURCES

a. Select a named resource row and review the **attached comments** to each request from the project manager individually.





b. Hide the comments and evaluate the remaining availability of the named resource individually in the **Availability** column or the **tooltip text** when you hover the mouse over each visible period.

Job Aid

	Requests by Resource	Overa Proposed	Il Total ← Committed	(Proposed	October 202 Committed	1 Availability	N Proposed	lovember 20 Committed	21 Availability	D Proposed	ecember 20 Committed	21 Availability	Proposed	January 202 Committed	2 Availability	I Proposed	ebruary 202 Committed	22 Availability
	Totals	590.0	270.0	170.0	50.0	422.5	160.0	50.0	445.0	40.0	20.0	497.5	140.0	110.0	362.5	80.0	40.0	410.0
	△ Albert Connell	190.0	0.0	60.0	B	157.5	50.0		165.0	10.0		172.5	30.0		157.5	40.0		150.0
••••	Sensei IQ Resource M 🖾 📾	190.0	0.0	Availability (0 = 157.5 hour	Capacity minus	s all Committe	d hours on a	ll projects)	\bigcirc	10.0		\bigcirc	30.0		\bigcirc	40.0		
•••	✓ Carl Executive	130.0	0.0	The Breakdo Capacity	wn	157.5 hours			165.0	10.0		172.5			157.5			150.0
		270.0	270.0	Committed Availability	-	- 0.0 hours 157.5 hours			115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110.0
				Days with ca Percentage a Period Status In this case the Albert Conn	pacity: ivailable: 5: Set b ne availability ell.	21 days 100% approver is for the spec	ific resource:											

c. Once you have decided to fulfill the demand based on the proposed work **with** amendments, enter the hours you are committing to the project in the **Committed** cells against the selected project row for the visible periods only.

Search D			4	October	2021	0101 5	\vee \triangleright				Zoom	•		0	/ III ~		C
	Overa	ll Total ←	(October 202	1	N	ovember 20	21	D	ecember 20	21		January 202	2		ebruary 202	22
Requests by Resource	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availab
Totals	590.0	330.0	170.0	80.0	392.5	160.0	80.0	415.0	40.0	20.0	497.5	140.0	110.0	362.5	80.0	40.0	410
△ Albert Connell	190.0	60.0	60.0	30.0	127.5	50.0	30.0	135.0	10.0		172.5	30.0		157.5	40.0		150
Sensei IQ Resource M 🖉 🖽 🞟	190.0	60.0	C	30		50.0	30		10.0			30.0			40.0		
	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			15
✓ Chris Thomas	270.0	270.0	50.0	50.0	107.5	50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	11

Tip: If you want to automatically fill the **Committed** cell with the proposed hours submitted (also referred to as **unfulfilled submissions**) against the pending request for a single visible period only on the **Resource Demand** page **without** any amendment, you can click the value in the **Proposed** cell to automatically copy then commit the proposed hours in the **Committed** cell.

	,			1	October	2021	C MM 2	~ V				200m	L++ (111)					0
		Overa	III Total ←		October 202	1	N	lovember 20	21	D	ecember 20	21		January 2022	2	F	ebruary 202	2
	Requests by Resource	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availabi
	Totals	590.0	340.0	170.0	80.0	392.5	160.0	80.0	415.0	40.0	30.0	487.5	140.0	110.0	362.5	80.0	40.0	410.
••	△ Albert Connell	190.0	70.0	60.0	30.0	127.5	50.0	30.0	135.0	10.0	10.0	162.5	30.0		157.5	40.0		150
••	Sensei IQ Resource M 🖉 🖼 📾	190.0	70.0	60.0	30		50.0	30		10.0	- 10		30.0			40.0		
	✓ Carl Executive	130.0	0.0	60.0		157.5	60.0	Proposed Ho = 10.0 hours	urs	Ľ	ſ				157.5			150
	✓ Chris Thomas	270.0	270.0	50.0	50.0	107.5	50.0	Poriod Status	: Approved alue to copy t	o committed	and 🗸 appro	ve this	110.0	110.0	47.5	40.0	40.0	110

d. If you have also decided to allocate additional named resources to fulfill the request for the remaining proposed hours (also referred to as **unfulfilled submissions**), click the **Row Menu** button (...) in front of the project name row to view more options.

e. Click the **Add Resource** button and search then **Select a resource** that you want to commit to the project based on their total availability for the visible periods as displayed in the live search results.

Job Aid

	Ouera	II Total 6		etobor 202	1	N	ouember 20	21		locombor 20	1		January 202			Cobruger 202	12
Requests by Resource	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availab
Totals	590.0	460.0	170.0	110.0	392.5	160.0	100.0	415.0	40.0	30.0	487.5	140.0	140.0	332.5	80.0	80.0	390
^ Albert Connell	190.0	190.0	60.0	60.0	127.5	50.0	50.0	135.0	10.0	10.0	162.5	30.0	30.0	127.5	40.0	40.0	130
IQ Resource M 2	190.0	120.0	60.0	30		50.0	30		10.0	10		30.0	30		40.0	20	
ow Menu ect 0 ~		70.0		30	127.5		20	145.0			172.5			157.5		20	130
Autofill	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150
Add Resource	270.0	270.0	50.0	50.0	107.5	50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110
Albert Connell Sensei IQ Resource M	190 . 1√ 190.	0															
Bob R.	~																
··· Suggested resources	130	.0															
BB Bob Banker Network Architect 80	2.5 hrs 270	0															

Important: Once you have added an additional named resource, the remaining proposed hours (also referred to as **unfulfilled submissions**) for the project are automatically committed to the added named resource for the visible period.

	Overa	ll Total ←		October 2021		N	lovember 20	21	D	ecember 20	21		January 202	2		ebruary 202	22
Requests by Resource	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availab
Totals	590.0	460.0	170.0	110.0	392.5	160.0	100.0	415.0	40.0	30.0	487.5	140.0	140.0	332.5	80.0	80.0	390
···	190.0	190.0	60.0	60.0	127.5	50.0	50.0	135.0	10.0	10.0	162.5	30.0	30.0	127.5	40.0	40.0	130
·· Sensei IQ Resource M 🖉 🗹 🗸	190.0	120.0	60.0	• 30		50.0	* 30		10.0	10		30.0	30		40.0	• 20	
🏹 Bill Collett)	70.0	>	30 🗘	127.5		20	145.0			172.5			157,5	-	20	130
- To Bob Melvin		0.0			157.5			165.0			172.5			157.5			150
··· · Carl Executive	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150
··· 🗸 Chris Thomas	270.0	270.0	50.0	50.0	107.5	50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	11

If you commit additional named resources to the project, you need to adjust the allocation of committed work proportionally in the **Committed** cell for each visible period where required.

				~	Octobe	2021						20011	L++ [111]			(=		0
		Overa	II Total ←	C	October 202	1	N	ovember 20.	21	D	ecember 20	21		January 2022	2	F	ebruary 202	12
	Requests by Resource	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availabi
	Totals	590.0	460.0	170.0	110.0	392.5	160.0	100.0	415.0	40.0	30.0	487.5	140.0	140.0	332.5	80.0	80.0	390.
••	↑ Albert Connell	190.0	190.0	60.0	60.0	127.5	50.0	50.0	135.0	10.0	10.0	162.5	30.0	30.0	127.5	40.0	40.0	130.
	Sensei IQ Resource M 🛛 🖾	190.0	120.0	60.0	➡ 30		50.0	➡ 30		10.0	10		30.0	30		40.0	→ 20	
•	^T → Bill Collett		45.0	1	20	137.5	1	10	155.0			172.5			157.5	1	15	135.
	T→ Bob Melvin		25.0	,	10	147.5)	10	155.0			172.5			157.5		5	145
	✓ Carl Executive	The visible p	eriod for this 0.0	request is cr 60.0	urrently App	roved, some 157.5	of which has 60.0	s been overw	ritten by an 165.0	approver. 10.0		172.5			157.5			150
	✓ Chris Thomas	270.0	270.0	50.0	50.0	107.5	50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	11(



Important: At this point of the resource request approval process, the approved resource allocation (also referred to as **committed work**) is displayed in the **Committed** column as *read-write* and the cells the **Proposed** hours 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.

Search	~				4	October	r 2021 🛄	0000 5	\sim \triangleright				Zoom			0		Ð	0
			Overal	II Total ←	0	October 202	1	N	ovember 20	21	D	ecember 20	21		January 2022	2	F	ebruary 202	2
Reques	ts by Resource		Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availabi
Totals			590.0	450.0	170.0	110.0	392.5	160.0	100.0	415.0	40.0	30.0	487.5	140.0	130.0	342.5	80.0	80.0	390.
	pert Connell		190.0	180.0	60.0	60.0	127.5	50.0	50.0	135.0	10.0	10.0	162.5	30.0	20.0	137.5	40.0	40.0	130
Se	ensei IQ Resource M	⊡ ~	190.0	110.0	60.0	- 30		50.0	= 30		10.0	🛨 10		30.0	= 20		40.0	4 20	
Ţ,	Bill Collett	\square		45.0		20	137.5		10	155.0	· · · · ·		172.5			157.5		15	135
Ţ,	Bob Melvin	\square		25.0		10	147.5		10	155.0			172.5			157.5		5	145
✓ Car	rl Executive		130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150

- f. Attach **comments** to each fulfilled resource request to provide contextual information to the respective project managers (**recommended**).
- g. Once you have completed the approval process, click the **Save** button to keep the changes.

		Sens Comr	ei IQ Resource Management Ir ments for Albert Connell	mplement ×												×
Search	Q		Francis Luzuriaga	Oct 20	0100 5	~ >				Zoom	C. E	1 🖻 🗰	1 0	✓ I≣ ✓	•	02
Reques	sts by Resource		Approved 40 hours for October	and November.	N	lovember 20 Committed	21 Availability	D	ecember 202 Committed	21 Availability	Proposed	January 202	2 Availability	Proposed	February 202 Committed	.2 Availability
neques	no of nesource	E	Francis Luzuriaga	Oct 20	and the second			1000000000								
Totals			Requesting an increase in the co Albert from 40 to 60 hours due t	mmitted work of to the increase in	160.0	100.0	415.0	40.0	30.0	487.5	140.0	130.0	342.5	80.0	80.0	390.0
^ Alb	bert Connell		scope.		50.0	50.0	135.0	10.0	10.0	162.5	30.0	20.0	137.5	40.0	40.0	130.0
··· Se	ensei IQ Resource M) <	F		50.0	30		10.0	10		30.0	20		40.0	20	
Tə	Bill Collett		-			10	155.0			172.5			157.5		15	135.0
··· ^T ,	Bob Melvin					10	155.0			172.5			157.5		5	145.0
🗸 Car	rl Executive				60.0		165.0	10.0		172.5			157.5			150.0
\dots \vee Chr	ris Thomas				50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110.0
		I har nece dem	ve approved the proposed work with essary amendments and backfilling t hand with additional resources.	h the ▷												
													Autofill	Sav	re 🚺	G

Tip: The status of both proposed and committed hours (with attached comments) is displayed as either **Set by Approver** (if the hours were manually adjusted) or **Approved** (if no amendments were made) when you hover the mouse over the approved hours in the **Proposed** cell or **Committed** cell respectively.



		Over	all Total ←		October 202	1	N	ovember 20	21	Dec	cember 20	21		January 2022	2	Î I	February 202	22
	Requests by Resource	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availab
	Totals	590.0	450.0	170.0	110.0	392.5	160.0	100.0	415.0	40.0	30.0	487.5	140.0	130.0	342.5	80.0	80.0	390
	△ Albert Connell	190.0	180.0	60.0	60.0	127.5	50.0	50.0	135.0	10.0	10.0	162.5	30.0	20.0	137.5	40.0	40.0	130
	Sensei IQ Resource M 🗔 🖓	190.0	Proposed Hou	rs			Committed Ho	burs		Committed H	lours		30.0	20		40.0	20	
•••	Bill Collett		= 60.0 hours The Breakdow	n		137.5	= 50.0 hours The Breakdow	'n		= 10.0 hours The Breakdor	wn				157.5		15	135
	ĭ→ Bob Melvin 💭 🗸		Capacity Committed (e	lsewhere)	157.5 hours + 30.0 hours	147.5	Capacity Committed (e	lsewhere)	165.0 hours + 20.0 hours	Capacity Committed	1	172.5 hours 10.0 hours			157.5		5	145
	✓ Carl Executive	130.0	Committed (h Net proposed	ere) (here)	- 60.0 hours - 0.0 hours	157.5	Committed (h Availability	iere)	- 50.0 hours 135.0 hours	Availability	= 1	162.5 hours			157.5			150
	✓ Chris Thomas	270.0	Days with cap	acity:	21 days	107.5	Days with cap Percentage av	acity: vailable:	22 days 82%	Percentage a Period Status	vailable:	94% Approved	110.0	110.0	47.5	40.0	40.0	110

3. MODIFY AN EXISTING FULFILLED REQUEST FOR NAMED RESOURCES

- a. Apply the Requests by Project view from the Grouping menu on the page (recommended).
- b. Click the Expand All button to display all named resource rows under each project name displayed on the page.

earch >				4	October	2021] 000 5	\vee \triangleright				Zoom					±)	D
		Overa	II Total ←	C	October 202	1	N	ovember 20	21	D	ecember 20	21		January 2022	2	✓ Proiec	t	
Requests by Project		Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability			
																Resou	irce	
Totals		590.0	450.0	170.0	110.0	677.5	160.0	100.0	725.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	67
^ Sensei IQ Resource Mana	gement I	590.0	450.0	170.0	110.0	677.5	160.0	100.0	725.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	67
Albert Connell	1	190.0	110.0	60.0	30	127.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	13
[™] Bill Collett			45.0		20	137.5		10	155.0			172.5			157.5		15	13
[™] Bob Melvin	\square		25.0		10	147.5		10	155.0			172.5			157.5		5	14
Carl Executive	— •••	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			15
Chris Thomas	1	270.0	270.0	50.0	50	107.5	50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	11

Tip: The approved resource allocation (with attached comments) is displayed in the **Committed** column as *read-only* and the cells the **Proposed** hours 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.

- c. Locate the named resource row with committed work that you want to update using the **Search** field.
- d. Modify the existing committed hours for the visible periods where relevant using the **Committed** column.



Chris	<u></u>			4	October	2021	111 5	~ >				Zoom	C. 🗇	ē ē	o >	< ≣ <	▣ ⊡	0
		Overa	ll Total ←	(October 202	1	N	ovember 20	21	D	ecember 202	21		anuary 2022	2	F	ebruary 202	2
Rec	quests by Project	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availabil
Tot	als	590.0	450.0	170.0	110.0	677.5	160.0	100.0	725.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0
• ^	Sensei IQ Resource Management I	590.0	450.0	170.0	110.0	677.5	160.0	100.0	725.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0
	Chris Thomas 🖉 🖾 🗸	270.0	270.0	50.0	50	107.5	50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.
								+										
^	Sensei IQ Resource Management I	590.0	430.0	170.0	110.0	677.5	160.0	80.0	745.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670
	Chris Thomas 🛛 🖉 🖾 🗸	270.0	250.0	50.0	50	107.5	50.0	зd¢	D	20.0	20	152.5	110.0	110	47.5	40.0	40	110

Tip: At this point of the resource request process, the status of the modified committed hours in the visible period remains **Set by approver.**

	Overa	all Total ←		October 202	1	N	ovember 20	21	
Requests by Project	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Prop
Totals	590.0	430.0	170.0	110.0	677.5	160.0	80.0	745.0	
 ^ Sensei IQ Resource Management I	590.0	430.0	170.0	110.0	677.5	160.0	80.0	745.0	
 Chris Thomas 🖉 🛱 🗸	270.0	250.0	50.0	50	107.5	50.0	30 \$	135.0	
						= 30.0 hours The Breakdo Capacity Committed (Availability Days with ca Period Status	wn (elsewhere) (here) pacity: svailable: s; Set	165.0 hours - 0.0 hours - 30.0 hours = 135.0 hours 22 days 82% t by approver	

e. Attach **comments** to the modified committed work to provide contextual information to the project manager (**recommended**).

Chris O	FL	Francis Luzuriaga Oct 7 I would like to request Chris Thomas please as he is already familiar with the project scope and he has	000 5 N	✓ ▷ lovember 20	21	D	ecember 202	Zoom		January 202	2	 / I≣ ~ F 	ebruary 202	0 2 2
Requests by Project		capacity to work on this project.	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
Totals	FL	Francis Luzuriaga Oct 8 I have increased the requested effort for Chris	160.0	80.0	745.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0
Sensei IQ Resource Management Chris Thomas		Thomas for November from 40 hours to 50 hours due to a change in scope.	160.0	80.0	745.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0
Chris Thomas		Francis Luzuriaga 0x28 All proposed work for Chris in this project have been approved without any amendment from the original request.	50.0	30	135.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0
[I hav Nove	e reduced the committed work of Chris in ember from 50 to 30 hours as he will be con leave for 3 days as ner conversation												

f. If you also need to replace any existing named resource that was originally allocated to the project as a backfill to a portion of the requested time that could not be entirely allocated to the requested named resource, click the **Row** Menu button (...) in front of the named resource row that you want to replace to view more options.



g. Select the **Change Resource** option and **Select a resource** to search then replace the named resource for the visible periods.

	Overa	ill Total ←	(October 202	1	N	ovember 20	21	D	ecember 20	21	J	anuary 2022	2	1	February 202	2
Requests by Project	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availabili
Totals	590.0	430.0	170.0	110.0	677.5	160.0	80.0	745.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0
Sensei IQ Resource Management I	590.0	430.0	170.0	110.0	677.5	160.0	80.0	745.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.
Albert Connell 📴 🗸	190.0	110.0	60.0	30	127.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	130.
		45.0		20	137.5		10	155.0			172.5			157.5		15	135.
Open Resource		25.0		10	147.5		10	155.0			172.5			157.5		5	145.
Change Resource G 🖵 🖷	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150.
Remove Resource	270.0	250.0	50.0	50	107.5	50.0	30	135.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.
T- Bil Collett Bil Suggested resources Bil Bil Bil Bil DBA	R, V 802.5 hrs	130.0															
BII Infrastructure Developer	802.5 hrs																

h. Attach **comments** to the modified resource allocation to provide contextual information to the project manager (**recommended**).

Requests by Project Valuation Propose Committee Valuation			N	ovember 20	21	D	ecember 20	21		January 202	2	F	ebruary 202	2
Totals 1600 800 7550 400 300 8325 1400 1300 6575 800 800 6 · Sensel Q Resource Management	Requests by Project		Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availabili
^ Sensei IQ Resource Management 1600 800 755. 40.0 300 832. 40.0 130.0 657.5 80.0 80.0	Totals		160.0	80.0	755.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	685.0
Albert Connell Image: Connell Connell Image: Connell Conn	- A Sensei IQ Resource Managemen	t	160.0	80.0	755.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	685.0
Image: Second	· Albert Connell C		50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	130.0
□ □ 10 155.0 □ 172.5 □ 157.5 0 5 1 □ Carl Executive □ 0 165.0 10.0 172.5 □ 157.5 □ 0 1 □ Chris Thomas □ 0 135.0 200 200 152.5 110.0 110 47.5 40.0 40.0 1	T→ Bill Tibbetts			10	165.0			172.5			157.5		15	150.0
Carl Executive Control Linear Contr	T→ Bob Melvin			10	155.0			172.5			157.5		5	145.
Chris Thomas	Carl Executive		60.0		165.0	10.0		172.5			157.5			150.0
	· Chris Thomas 🖉 🕻	2	50.0	30	135.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0

- i. Finally, if you need to remove an allocated resource to the project, click the **Row Menu** button (...) in front of the named resource row that you want to remove from the project (e.g., if the resource has already left the organization) to view more options.
- j. Select **Remove Resource** from the menu to remove the allocation of the resource against the project row displayed on the page.

		Overa	ll Total ←	(October 202	1	N	ovember 20	21	D	ecember 202	21	J	lanuary 2022		F	ebruary 202	2
Requests by Project		Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availab
Totals		590.0	430.0	170.0	110.0	697.5	160.0	80.0	755.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	685
Sensei IQ Resou	rce Management I	590.0	430.0	170.0	110.0	697.5	160.0	80.0	755.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	685
·· Albert Connell	©.√	190.0	110.0	60.0	30	127.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	13
Bill Tibbetts	00%		45.0		20	157.5		10	165.0			172.5			157.5		15	15
Bob Melvin			25.0		10	147.5		10	155.0			172.5			157.5		5	14
Open Resource	, □ @	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			15
Change Resource	001	270.0	250.0	50.0	50	107.5	50.0	30	135.0	20.0	20	152.5	110.0	110	47.5	40.0	40	11

Important: Removing allocated resources from existing commitments in a project may result in **partially unfulfilled submissions**. In this case, the cells the **Proposed** hours are contained in will remain highlighted in **red** denoting that the committed hours fulfilled by the line manager are now less than the originally fulfilled hours for the period requested until the line manager re-allocates the remaining hours (**partially unfulfilled submissions**) to replacement resource/s backfilling the committed work that was removed.

		Outora	II Total 6		Actober 202	1	N	oversher 20	21	D	acombor 20	01		Januany 2023	,		Cobruspy 202	22
	Requests by Project	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availabi
	Totals	590.0	430.0	170.0	110.0	697.5	160.0	80.0	755.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	685
	△ Sensei IQ Resource Management I	590.0	430.0	170.0	110.0	697.5	160.0	80.0	755.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	685.
	Albert Connell 🖂 🗸	190.0	110.0	60.0	30	127.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	130
	™ Bill Tibbetts 🖉 💭 🗸		45.0	1	20	157.5	1	10	165.0			172.5			157.5		15	150
	°→ Bob Melvin		25.0		10	147.5		10	155.0			172.5			157.5		5	145
-	Albert Connell 🖂 🗸	190.0	110.0	60.0	30	127.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	13
	Ğ Bill Tibbetts 🖉 🖼 ✓		45.0		20	157.5		10	165.0			172.5			157.5	_	15	15

k. Once you have completed the updates to the existing committed work, click the **Save** button to keep the changes.

		Overa	ll Total ←		October 202	1	N	ovember 20	21	D	ecember 20	21		January 2022	2	1	ebruary 202	22
	Requests by Project	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
	Totals	590.0	405.0	170.0	100.0	550.0	160.0	70.0	600.0	40.0	30.0	660.0	140.0	130.0	500.0	80.0	75.0	540.0
	△ Sensei IQ Resource Management I	590.0	405.0	170.0	100.0	550.0	160.0	70.0	600.0	40.0	30.0	660.0	140.0	130.0	500.0	80.0	75.0	540.0
•••	Albert Connell 🛛 🖾 🗸	190.0	110.0	60.0	30	127.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	130.0
···	T→ Bill Tibbetts 🖉 💭 📈 🗸		45.0		20	157.5		10	165.0			172.5			157.5		15	150.0
•••	Carl Executive	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150.0
	Chris Thomas 🛛 🖉 🖾 🗸	270.0	250.0	50.0	50	107.5	50.0	30	135.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0

Tip: Clicking the Cancel button will discard the changes applied to the page.



Fulfill a submitted request for generic resources

Resource Manager

⁰ Resources > Resources > Resource Demand

1. SET THE RESOURCE DEMAND HORIZON

a. Ensure that you are in the **Resources** area and click **Resource Demand** in the **Resources** section.

Power Apps Sense	ct IQ Call Call Call Cal	te 🗸 🕐 Refres	h 🕼 Email a L	.ink 🗸 🔊 Flo	ow 🗸 🗐] Run Report 🗸	Export to Excel	🗸 🚺 Imp	oort from Exce	el ∨	view :	7 (n
 G Home O Recent ∨ Planed ∨ 	Resource Demand ~		Octob	per 2021 🛗 🕅	1 5 × D	>	Zoc	om 🛱 🛅			⊕ ⊟	7 0 4
Resources	Requests by Resource	Overall Total Proposed Committe	← Octo d Proposed Co	ober 2021 mmitted Availability	No Proposed	vember 2021 Committed Availa	December bility Proposed Committe	2021 ed Availability	Ja Proposed	anuary 2022 Committed Availability	F Proposed	February 20 Committe
 Insights Resources 	Totals	590.0 100.0	170.0	50.0 422.5	160.0	50.0 44	5.0 40.0	517.5	140.0	472.5	80.0	
Enterprise Calendars	··· · V Albert Connell	190.0 100.0	60.0	50.0 107.5	50.0	50.0 11	5.0 10.0	172.5	30.0	157.5	40.0	
Resource Demand Availability Heatmap	Carl Executive	130.0 0.0	60.0	157.5	60.0	16	5.0 10.0	172.5		157.5		
Knowledge ⑦ Training 圖 What's New	Chris Thomas	270.0 0.0	50.0	157.5	50.0	16	20.0	172.5	110.0	157.5	40.0	ę
Resources 🗘												

b. Follow the same steps described in the Approve a request for named resources section above.

2. HARVEST THE REQUESTS FOR GENERIC RESOURCES

Important: The **Resource Demand** view in Sensei IQ has a system default filter to allows users to manage the demand for named resources that they are the line manager for only. Generic resources do not typically have fixed line managers. Unless the default system view is customized in your organization's Sensei IQ solution, a personal view can be created with custom filters by the users to also include all resource requests for generic resources by default (**recommended**).

	Power Apps Sensei IQ		P Search	Advanced filters	×
=	\leftarrow 🕅 Show Chart $+$ New 📋 Delete	e 🗸 🖒 Refresh 🖪	🕄 Email a Link 🖂 🔊	🔀 Reset to default	
6	Resource Demand ~			AND V	
\$	Search 🔎		October 20	Rookable Resource (Boo V Contains data V	
<u></u>	Requests by Resource	Overall Total ← Proposed Committed	October 2021 Proposed Committed Ava	AND ~	
CR	Totals	590.0 450.0	170.0 110.0	□ Line Manager ✓ Equals current user ✓ ····	
RS.	\cdots \qquad Albert Connell	190.0 180.0	60.0 60.0	+ Add ~	
%	🖂 Carl Executive	130.0 0.0	60.0		
0	🗡 Chris Thomas	270.0 270.0	50.0 50.0	+ Add ~	



a. From the ribbon, click the **Create View** button to display the **Advanced Find** dialog box.

	Power Apps Sensei IQ				P Sear	ch											7 0	? (1)
=	← 🖾 Show Chart + New 🗊 Delete	∨	tefresh E	🖏 Email a L	ink ~	D Flow	v 📶 Ru	n Report $$	🕼 Exce	l Templates	~ Q	xport to Exce	a ~	Import fr	om Excel	~ B.c	reate view	A
â	Resource Demand \sim																	∇
	Search $>$				Octob	er 2021	1010 S	~ >				Z	oom 🖪	•		o∼ (≣ ∖		0 2
<u></u>		Overall Te	íotal ←		October 2021		N	ovember 202	21	D	ecember 202	21		January 2022			ebruary 202	2
Fà	Requests by Resource	Proposed C	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
	Totals	590.0	450.0	170.0	110.0	392.5	160.0	100.0	415.0	40.0	30.0	487.5	140.0	130.0	342.5	80.0	80.0	390.0
ß	\cdots $$ Albert Connell	190.0	180.0	60.0	60.0	127.5	50.0	50.0	135.0	10.0	10.0	162.5	30.0	20.0	137.5	40.0	40.0	130.0
6	··· 🗠 Carl Executive	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150.0
0	\cdots \checkmark Chris Thomas	270.0	270.0	50.0	50.0	107.5	50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110.0

b. In the dialog box, select Resource Demand from the Use Saved View drop-down list.

FILE	ADVANO	CED FIND	1					Microsoft	Dynamics 365 Francis L Sensei IQ -	uzuriaga ⊘ Learning ⊗
Query	Saved Views Show	Results	New	Save	Edit Columi	ns Clear	E Group ANI	D Download Fetc XML Debug		
Look fo	r: Resou	rce Reque	ests				В	Use Saved View:	[new]	~
5	Select						-		[new]	
									System Views	
									Active Resource Requests	
									Inactive Resource Requests	
									Resource Demand	
									Resource Requests W	

- c. Create two (2) additional filters to the selected view using the next blank rows.
 - Resource Type Equals Generic
 - Line Manager Does Not Contain Data

Tip: The default filter Line Manager - Equals Current User is automatically displayed on the screen.

FI	LE	ADVAN	ICED FIND							Microsoft	Dynamics 365	Francis Luzuriaga Sensei IQ - Learning 🚕
Qu	Jery	Saved Views	Results	New	Save	Gave As ✓ Edit Columns ✓ Edit Properties	2 Clear	【≣ Group A 【≣ Group C ➡ Details	AND DR De	pwnload Fetch XML		
		Show			Vi	iew		Query		Debug		
Lo	ok fo	r: Reso	urce Requ	ests				~	Use S	Saved View:	Resource Demand	~
		Select										
	~	Bookable	Resource				<u>Conta</u>	ains Data				
		Line M	<u>Manager</u>		Equ	uals Current User						
		✓ <u>Resou</u>	urce Type		Equ	uals	G	eneric				
		Line M	<u>Manager</u>		Doe	es Not Contain Data	~					
	Τ	Selec	<u>t</u>									

d. Press and hold the control key (Ctrl) on your keyboard and select the newly added filters in the view.



e. Click the Group AND button from the Advanced Find ribbon then release the control key (Ctrl) on your keyboard.

FILE		ADVANCED FINE	þ			Microsoft [ynamics (365		Francis Luzuriaga Sensei IQ - Learning 🔈
Quer	ry k fo	Saved Results Views Show	New	Save As Save Edit Columns Uiew Edit Properties View	Clear Clear Query	Download Fetch XML Debug Use Saved View: F	esource	Demand		~
	0	Select					Ē	Select		
~	1	Bookable Resource	2		Contains Data			Bookable Resource	Cor	ntains Data
		 Line Manager 		Equals Current User				 Line Manager 	Equals Current User	
	Ctrl	Resource Type Line Manager Ect		Equals Does Not Contain Data	<u>Generic</u>	D		AND Resource Type Line Manager Select	<u>Equals</u> Does Not Contain Da	<u>Generic</u> ta

- f. Press and hold the control key (Ctrl) on your keyboard again and select the default filter and the AND query line in the view this time.
- g. Click the Group OR button from the Advanced Find ribbon then release the control key (Ctrl) on your keyboard.

	_								Microso	t Dyr	amics	365						Francis Lu	ızuriaga 🕜	
FIL	E	ADVAN	CED FIND															Sensei IQ -	Learning 🛆	
Qui	ery	Saved Views Show	Results	New	Save Vie	Edit Columns	2 Clear	(E Group AN) (E Group OR Details Query	D D D D D D D D D D D D D D D D D D D	tch										
Loc	ok for	Resou	irce Requ	ests				~	Use Saved Vie	v: Re		<u>Select</u>								~
	<u>S</u>	elect									~	Bookal	ole Resou	irce			Cont	tains Data		
	✓ <u>B</u>	ookable	Resource				<u>Conta</u>	ins Data					✓ Lin	ne Ma	inager	Equals	Current User			
	~	Line N	lanager		Equ	als Current User						↓ OR		~	Resource Type	~	 Equals 		Generic	
	~	AND	Line N	ype lanager		Equals Does Not Cor	<u>ntain Data</u>	<u>Generic</u>				Se	ect	Í V	<u>Line Manager</u>		Does Not Co	ntain Data		
	Ct	triv _i																		

- h. Once you have set the custom filters and their grouping, click the **Save As** button from the **Advanced Find** ribbon.
- In the Save as new View dialog box, provide a unique name for your custom personal view and a description (recommended).
- j. Click the **Save** button and close the dialog box.





k. Apply the newly added custom personal view from the **My Views** list on the main **Resource Demand** page and select **Set current view as my default** from the menu options.

	Power Apps Sensei IQ	P Search					+ 7 :	9 ? (FL
=	← 🖾 Show Chart + New 🗊 Delete ∨ 🖒 Refresh 🖾 Email a Li	nk 🗸 🛛 🔊 F	Flow \sim 🔟 Run Report $$	🕮 Excel Templates \vee 🛛 🗐 E	Export to Excel 📔 🗸 🖪	Import from Excel	Create vi	ew :
6) (-)	Resource Demand (My Resources & All Generic Resource	\odot	Resource Demand (I	My Resources & All Gener	eric Resource) \vee			∇
☆ 61	Resource Demand (My Resources & All Generic Resource) Total C System Views Committed Proposed	October 2 Ictober 2021	My Views Resource Demand (My Resou	rces & All Generic Resource) Defa	ault - October	anuary 2022	S ∨ I≣ ∨ III February Proposed Comm	2022
B.	Resource Demand Default 450.0 320.0	110.0	System Views Resource Demand		Proposed Commi 320.0 110	130.0 342.5	230.0 8	0.0 390.0
R	Inactive Resource Requests 180.0 60.0	60.0	Active Resource Requests		60.0 60	20.0 137.5	40.0 44	0.0 130.0
0	Resource Requests With Committed Hours 0.0 40.0		··· Resource Requests With Com	mitted Hours	40.0		40.0	
	[A] Set current view as my default 60.0	-	S Reset default view		60.0	157.5		150.0
	Y Chris Thomas 270.0 270.0 50.0	50.0 10	107.5 50.0 50.0	115.0 20.0 20.0	152.5 110.0	110.0 47.5	40.0 40	0.0 110.0
	··· 🗠 Consultant 200.0 0.0 50.0		50.0	20.0	30.0		50.0	
	··· > DBA 220.0 0.0 60.0		50.0	20.0	30.0		60.0	

Important: Once the custom personal view is configured using the above steps, the **Resource Demand** page will always display all requests for named resources that the user is the line manager for including those for all generic resources that do not typically have fixed line managers by default.

	Po	ower Apps Sensei IQ					P Sea	rch										+ .	7 🕸	? (FL)
=	~	Show Chart + New	📋 Delete	~ C) Refresh 🛛 🛛	হ্ব Email a L	.ink $ $ \vee	Ø Flow	V 📶 Ru	in Report 🗸	Exce	l Templates	✓ < <p>Q = E</p>	xport to Exc	el ~	💐 Import fr	om Excel	~ B.C	.reate view	÷
ណ៍	Г	Resource Demand (My	Resourc	es & All	Generic F	Resource	e) ~													7
0	ſ	Search D	Ĩ.				< Octo	ber 2021	🛅 🕅 5	~ >				Z	oom 🛱		1	o ∨ I≣ ∨	. 🕀 🖻	02
× 3		Requests by Resource		Overa Proposed	II Total ← Committed	Proposed	October 202 Committed	1 Availability	N Proposed	lovember 20 Committed	21 Availability	C Proposed	ecember 202 Committed	21 Availability	Proposed	January 2022 Committed	2 Availability	Proposed	ebruary 2022 Committed	2 Availability
BR		Totals		1,170.0	450.0	320.0	110.0	392.5	290.0	100.0	415.0	100.0	30.0	487.5	230.0	130.0	342.5	230.0	80.0	390.0
R		△ Albert Connell		190.0	180.0	60.0	60.0	127.5	50.0	50.0	135.0	10.0	10.0	162.5	30.0	20.0	137.5	40.0	40.0	130.0
®		Sensei IQ Resource M	1 .	190.0	110.0	60.0	30		50.0	30		10.0	10		30.0	20		40.0	20	
0	***	^T → Bill Collett			45.0		20	137.5		10	155.0			172.5			157.5		15	135.0
		^T → Bob Melvin			25.0		10	147.5		10	155.0			172.5			157.5		5	145.0
		△ Business Analyst		160.0	0.0	40.0			30.0			20.0			30.0			40.0		
	***	Sensei IQ Resource M		160.0		40.0			30.0			20.0			30.0			40.0		
		△ Carl Executive		130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150.0
		Sensei IQ Resource M		130.0	0.0	60.0			60.0			10.0								
		△ Chris Thomas		270.0	270.0	50.0	50.0	107.5	50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110.0
		Sensei IQ Resource M	1	270.0	270.0	50.0	50		50.0	50		20.0	20		110.0	110		40.0	40	
		△ Consultant		200.0	0.0	50.0			50.0			20.0			30.0			50.0		
		Sensei IQ Resource M	<u>∧</u> ⊡-∞	200.0		50.0			50.0			20.0			30.0			50.0		
		↑ DBA		220.0	0.0	60.0			50.0			20.0			30.0			60.0		
																	Auto	fill	Save	Cancel



3. REVIEW AND FULFILL A REQUEST WITH NAMED RESOURCES

- a. Apply the **Requests by Project** view from the **Grouping** menu on the page (recommended).
- b. Click the **Expand All** button to display all named resource rows under each project name displayed on the page.

search)	0				Octob	per 2021	iii 000 5	~ >				Z	oom 🛱		A		(⊡)	В
Requests by Project		Overa Proposed	all Total ← Committed	Proposed	October 2021 Committed	1 Availability	Proposed	lovember 202 Committed	21 Availability	D	ecember 202 Committed	21 Availability	Proposed	January 2022 Committed	Availability	→ P Prot	roject	
Totals		1,170.0	450.0	320.0	110.0	677.5	290.0	100.0	725.0	100.0	30.0	832.5	230.0	130.0	657.5	R 230.0	esource 80.0	67
△ Sensei IQ Resource Man.	agement Im	1,170.0	450.0	320.0	110.0	677.5	290.0	100.0	725.0	100.0	30.0	832.5	230.0	130.0	657.5	230.0	80.0	67
Business Analyst	▲□=	160.0		40.0			30.0			20.0			30.0			40.0		
Consultant	▲ 🖾 📼	200.0		50.0			50.0			20.0			30.0			50.0		
DBA		220.0		60.0			50.0			20.0			30.0			60.0		
Albert Connell	1 .~	190.0	110.0	60.0	30	127.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	1
T→ Bill Collett	~		45.0		20	137.5		10	155.0			172.5			157.5		15	1
^T → Bob Melvin	~		25.0		10	147.5		10	155.0			172.5			157.5		5	1
Carl Executive	— •	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			1
Chris Thomas	1	270.0	270.0	50.0	50	107.5	50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	1

c. Locate the generic resource row with proposed work that requires allocation and review the **attached comments** to the request from the project manager individually.

-	search 2	lomm	ents for Consultant	1011 5	\checkmark \triangleright				Zoom	•				•	0
	Requests by Project	FL	Francis Luzuriaga Oct 7 I would like to request Brice Center if he is available	Proposed	Committed	21 Availability	D Proposed	Committed	21 Availability	Proposed	anuary 2022 Committed	2 Availability	F Proposed	ebruary 202 Committed	.2 Availabi
	Totals		his expertise and experience.	290.0	100.0	725.0	100.0	30.0	832.5	230.0	130.0	657.5	230.0	80.0	670.
	△ Sensei IQ Resource Management	FL	Francis Luzuriaga Oct 7 I have increased the requested effort for a	290.0	100.0	725.0	100.0	30.0	832.5	230.0	130.0	657.5	230.0	80.0	670.
	Business Analyst		hours due to a change in scope.	30.0			20.0			30.0			40.0		
	Consultant 🔬		C	50.0			20.0			30.0			50.0		
	DBA 🛕			50.0			20.0			30.0			60.0		
•••	Albert Connell			50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	130
	T→ Bill Collett 💭				10	155.0			172.5			157.5		15	135
	[™] Bob Melvin 💭				10	155.0			172.5			157.5		5	145
	Carl Executive			60.0		165.0	10.0		172.5			157.5			150
	Chris Thomas 🗾 💆		⊳	50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110

d. Hide the comments and click the **Row Menu** button (...) in front of the generic resource name and then the **Add Resource** button to search and allocate the named resource/s against the selected project row based on their primary roles and total availability for the visible periods only as displayed in the live search results.

			Overa	II Total ←		October 202	1	N	ovember 20	21	D	ecember 20	21		January 202	,		abruary 202	2
	Requests by Project		Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availabili
	Totals		1,170.0	450.0	320.0	110.0	677.5	290.0	100.0	725.0	100.0	30.0	832.5	230.0	130.0	657.5	230.0	80.0	670.0
	△ Sensei IQ Resource N	lanagement I	1,170.0	450.0	320.0	110.0	677.5	290.0	100.0	725.0	100.0	30.0	832.5	230.0	130.0	657.5	230.0	80.0	670.0
	Diness Analyst	▲□ •∞	160.0		40.0			30.0			20.0			30.0			40.0		
•••	Consultant	A / 🖾 🖷	Cons	ultant	▲ /	2 1 11	200.0	50.0			20.0			30.0			50.0		
2	Open Resource		Consul	ant	۶		220.0	50.0			20.0			30.0			60.0		
Ą,	Add Resource		Sugges	ted resources			0.0 27.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	130.0
••	[™] → Bill Collett	₽~	BC B	rice Center			87.5		10	155.0			172.5			157.5		15	135.0
••	[™] Bob Melvin	₽~	E	onsultant ddie Mason		802.5 hrs	47.5		10	155.0			172,5			157.5		5	145.0
	Carl Executive	,	EM c	onsultant		802.5 hrs	0.0 57.5	60.0		165.0	10.0		172.5			157.5			150.0
	Chris Thomas	1	EA C	mma Admin onsultant		802.5 hrs	0.0 07.5	.50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0
			FL F	rancis Luzuria onsultant	iga	802.5 hrs													
			ЭН За	ason Huebne onsultant	r i	802.5 hrs													
			NP N	lancy Portfoli	D	802.5 hrs													
			WN V	/alt Nickel		002.6 has													

Pro Tip: Type the generic resource role in the **Select a resource field** to filter the search results to only display the list of named resources that have the generic resource as their primary roles including their total availability for the visible periods on the page.

Important: Once a named resource is allocated, the proposed hours (also referred to as **unfulfilled submissions**) for the project are automatically committed to the added named resource for the visible periods.

	0	- II Total	н <u>а</u>	0-1-1-000							14						10
Requests by Project	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	2 Availability	Proposed	Committed	Z Availab
Totals	1,170.0	650.0	320.0	160.0	785.0	290.0	150.0	840.0	100.0	50.0	985.0	230.0	160.0	785.0	230.0	130.0	770
Sensei IQ Resource Management	I 1,170.0	650.0	320.0	160.0	785.0	290.0	150.0	840.0	100.0	50.0	985.0	230.0	160.0	785.0	230.0	130.0	770
Business Analyst 🛛 🛕 🖵	160.0		40.0			30.0			20.0			30.0			40.0		
Consultant 🖉 🖟	✓ 200.0		50.0			50.0			20.0	N		30.0	N		50.0	N	
T→ Brice Center	2	200.0		50	107.5		50	115.0		20	152.5		30	127.5		50	100
DBA 🛕	220.0		60.0			50.0			20.0			30.0			60.0		
Albert Connell	✓ 190.0	110.0	60.0	30	127.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	130
^T → Bill Collett	~	45.0		20	137.5		10	155.0			172.5			157.5		15	13
T→ Bob Melvin	4	25.0		10	147.5		10	155.0			172.5			157.5		5	145
Carl Executive	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150
Chris Thomas	270.0	270.0	50.0	50	107.5	50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110

e. If you need to distribute the allocation across multiple named resources against the project, repeat the above process until the requested time for generic resources against the project are fulfilled.

			Overa	II Total ←	(October 202	1	N	lovember 20	21	D	ecember 20	21		lanuary 202	2	1	February 202	22
	Requests by Project		Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availa
	Totals		1,170.0	645.0	320.0	160.0	1,100.0	290.0	150.0	1,170.0	100.0	50.0	1,330.0	230.0	155.0	1,105.0	230.0	130.0	1,07
•	Sensei IQ Resource Ma	nagement I	1,170.0	645.0	320.0	160.0	1,100.0	290.0	150.0	1,170.0	100.0	50.0	1,330.0	230.0	155.0	1,105.0	230.0	130.0	1,07
	DBA	▲□∞	220.0		60.0			50.0			20.0			30.0			60.0		
-	Business Analyst	▲□∞	160.0		40.0			30.0			20.0			30.0			40.0		
	Consultant	1	200.0		50.0			50.0			20.0			30.0			50.0		
•	^T → Brice Center	P ~		105.0	>	30	127.5	*	30	135.0		10	162.5		15	142.5		20	13
	L→ Jason Huebner	₽~		40.0		10	147.5		10	155.0		0	172.5		10	147.5		10	14
•	^T → Walt Nickel	₽~		50.0		10	147.5		10	155.0		10	162.5		0	157.5		20	13
•	Albert Connell	⊡ ~	190.0	110.0	60.0	30	127.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	1.
•	$^{T_{\rightarrow}}$ Bill Collett	₽~		45.0		20	137.5		10	155.0			172.5			157.5		15	13
•	^T → Bob Melvin	₽~		25.0		10	147.5		10	155.0			172.5			157.5		5	14
	Carl Executive		130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			15
	Chris Thomas	1	270.0	270.0	50.0	50	107.5	50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	1

Important: If you commit additional named resources, you need to adjust the allocation of committed work proportionally in the **Committed** cell for each visible period where required. At this point of the resource request approval process, the approved resource allocation against the primary role (also referred to as **committed work**) is displayed in the **Committed** column as *read-write* and the cells the **Proposed** hours 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 or more than the proposed hours for the period requested.

f. Attach **comments** either to the generic resource request or each named resource allocation to provide contextual information to the respective project managers (**recommended**).

R	equests by Project	Com	sei IQ Resource Manage ments for Consultant	ement Im	plement ×	N- Proposed	Comm	er 2021 Dece itted Availability Proposed Co	ember 20 ommitted	I21 January 2022 Febru Availability Proposed Committed Availability Proposed Committed	ary 2022 amitted A	Availat	
Т	otals	FL	I would like to request Brice Center if he is available for part or whole of the requested duration given his expertise and experience					90.0 Totals Sensei IQ Resource Management Implement Comments for Jason Huebner					
1	Sensei IQ Resource Managen	nent FL	his expertise and experi		Oct 7	290.0		^ Sensei IQ Resource Manage	gement		290.0	,070	
	DBA Z		I have increased the rec Consultant role for Nov	quested eff vember fror	ort for a m 40 hours to 50	50.0		DBA			50.0		
	Business Analyst Z		hours due to a change i	in scope.		30.0		Business Analyst			30.0		
	Consultant	F)	F			50.0		Consultant	Ç.ª		50.0		
	^T → Brice Center	F						Brice Center	Ţ			13	
	[™] Jason Huebner	F						[™] Jason Huebner	(14	
	^T → Walt Nickel	F						[™] → Walt Nickel	Ţ			13	
	Albert Connell	(C ²				50.0		Albert Connell	Ç.		50.0	130	
	[™] → Bill Collett	F Ih	Thave committed Brice Centre as requested but only partially. I have also allocated Jacon H and	ted but			^T → Bill Collett	F			13		
	^T → Bob Melvin	C on Wa	ly partially. I have also alloc alt N to fulfil the request for	ated Jason r a Consulta	H and Ant.			[™] Bob Melvin	F			14	
	Carl Executive	1	130.0 0.0	60.0	157.5	60.0		Carl Executive	F	I have also allocated Jason H and Walt N to fulfil	60.0	15	
	Chris Thomas	10 v	270.0 270.0	50.0	50 107.5	50.0		Chris Thomas	1.0	the request for a Consultant.	50.0	11	

g. Once you have completed the approval process, click the **Save** button to keep the changes.

	Requests by Project		Overa Proposed	II Total ← Committed	Proposed	Committed	1 Availability	Proposed	Committed	21 Availability	Proposed C	ember 20 ommitted	21 Availability	J Proposed	Committed	2 Availability	Proposed	Committed	22 Availab
	Totals		1,170.0	645.0	320.0	160.0	1,100.0	290.0	150.0	1,170.0	100.0	50.0	1,330.0	230.0	155.0	1,105.0	230.0	130.0	1,070
	Sensei IQ Resource Ma	anagement I	1,170.0	645.0	320.0	160.0	1,100.0	290.0	150.0	1,170.0	100.0	50.0	1,330.0	230.0	155.0	1,105.0	230.0	130.0	1,070
••	DBA		220.0		60.0			50.0			20.0			30.0			60.0		
	Business Analyst	▲□∞	160.0		40.0			30.0			20.0			30.0			40.0		
	Consultant	C ~	200.0		50.0			50.0			20.0			30.0			50.0		
	[™] Brice Center			105.0		30	Proposed	Hours	0	135.0		10 🗘	162.5		15	142.5		20	130
	^T → Jason Huebner	00-		40.0		10	= 50.0 ho Period St	urs atus: Set by a	o pprover	155.0	Committed Hou	s			10	147.5		10	140
	$\overset{T_{\rightarrow}}{\to} Walt\;Nickel$			50.0		10	147.5	-	10	155.0	= 10.0 hours				0	157.5		20	130
•••	Albert Connell	P .~	190.0	110.0	60.0	30	127.5	50.0	30	135.0	Capacity		172.5 hours	30.0	20	137.5	40.0	20	130
	^T → Bill Collett			45.0		20	137.5		10	155.0	Committed (less Committed (her	e)	- 10.0 hours			157.5		15	135
	^T → Bob Melvin	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		25.0		10	147.5		10	155.0	Availability	_	= 162.5 hours			157.5		5	145
••	Carl Executive	,	130.0	0.0	60.0		157.5	60.0		165.0	Days with capac Percentage avai	ity: able:	23 days 94%			157.5			150
	Chris Thomas		270.0	270.0	50.0	50	107.5	50.0	50	115.0	Period Status:	Se	t by approver	110.0	110	47.5	40.0	40	110

Tip: The status of both proposed and committed hours (with attached comments) in the above scenario is displayed as **Set by approver** when you hover the mouse over the approved hours in the **Proposed** cell or **Committed** cell respectively. The adjusted remaining availability of the allocated named resources for each visible period is displayed in the **Availability** column and in the tooltip text when you hover the mouse over the availability hours in the **Availability** cell. The **Availability** and **Committed** columns for generic resources are blank by default.

If you need to modify an existing fulfilled request for named resources (i.e., Change Resource, Remove Resource), follow the same steps described in the <u>Modify an existing fulfilled request for named resources</u> section above.

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.