

Overview

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

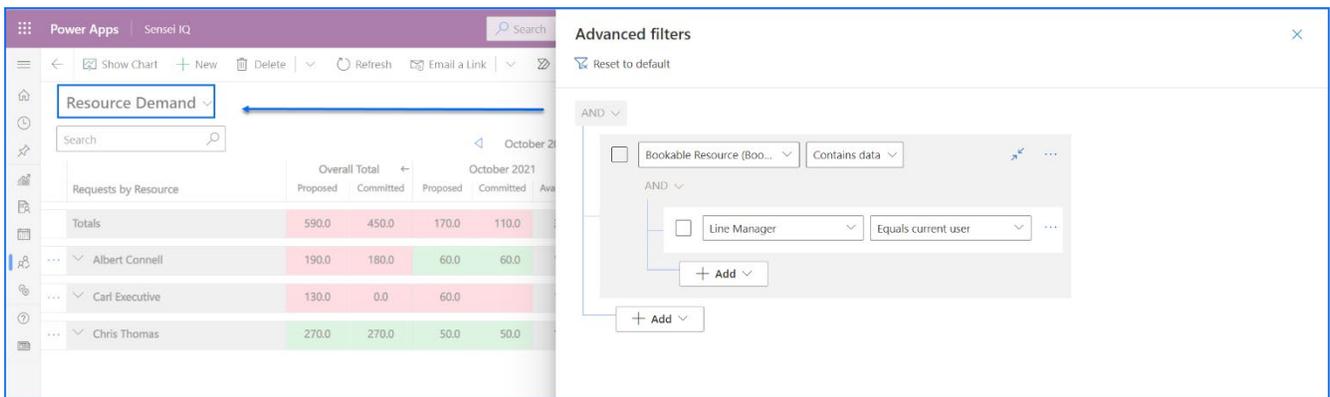
Work resources have defined availability and may have their time scheduled by a line manager in your organization. When a project manager submits a request for resources to support an approved project, the request is routed to the appropriate line managers for review and approval. If Resource Approval 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**

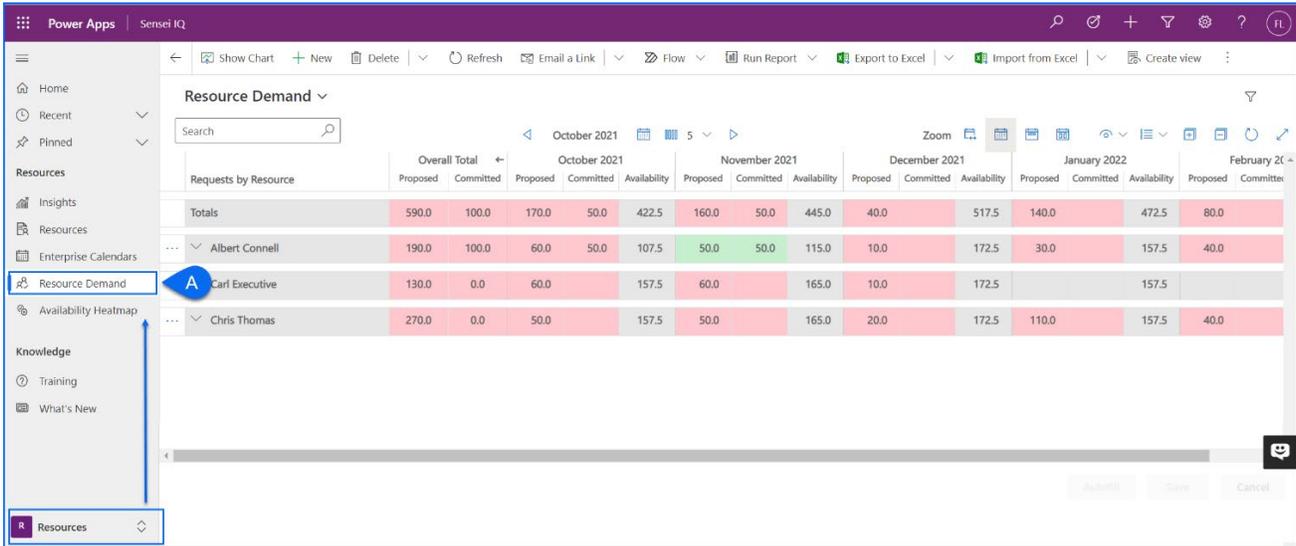
Important: The **Resource Demand** view in Sensei IQ has a default filter to allow users to manage the demand for resources that they are the line manager for. The filter can be modified or removed temporarily or permanently if your organization requires you to view all resources.



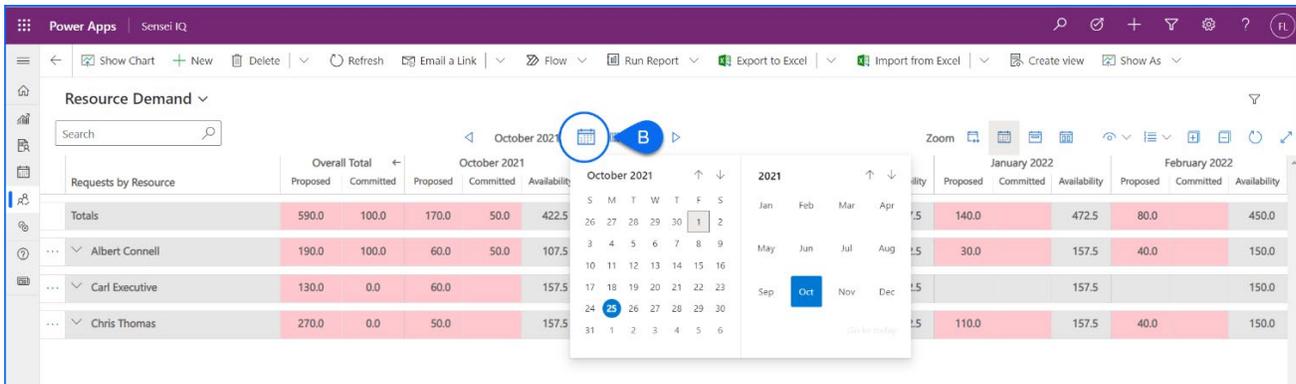
Approve a request for named resources

1. SET THE RESOURCE DEMAND HORIZON

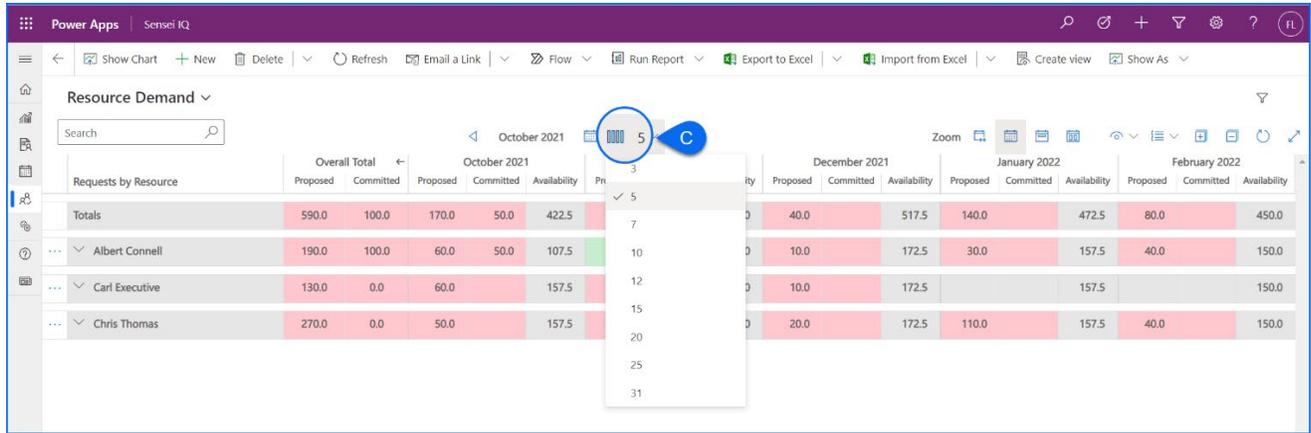
a. Ensure that you are in the **Resources** area and click **Resource Demand** in the **Resources** section.



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

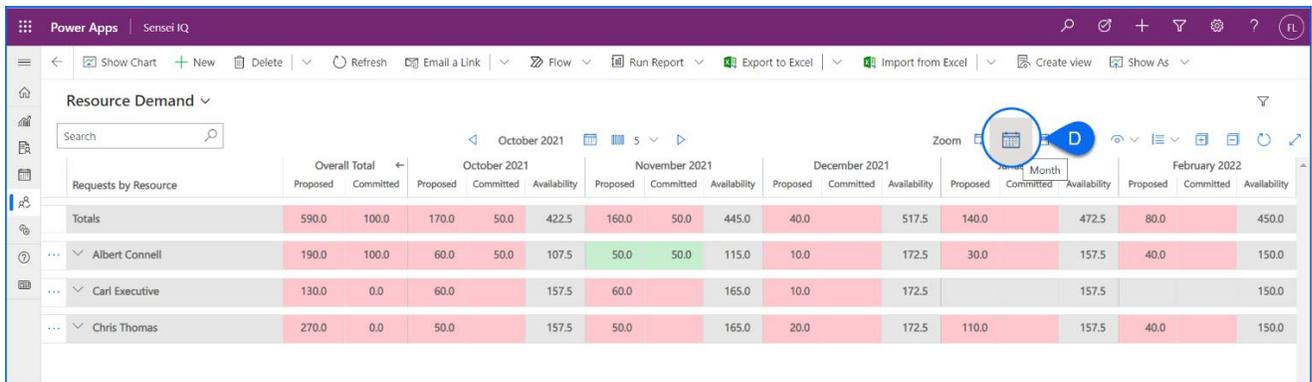


- c. Set the number of **periods** you want to be visible on the page.

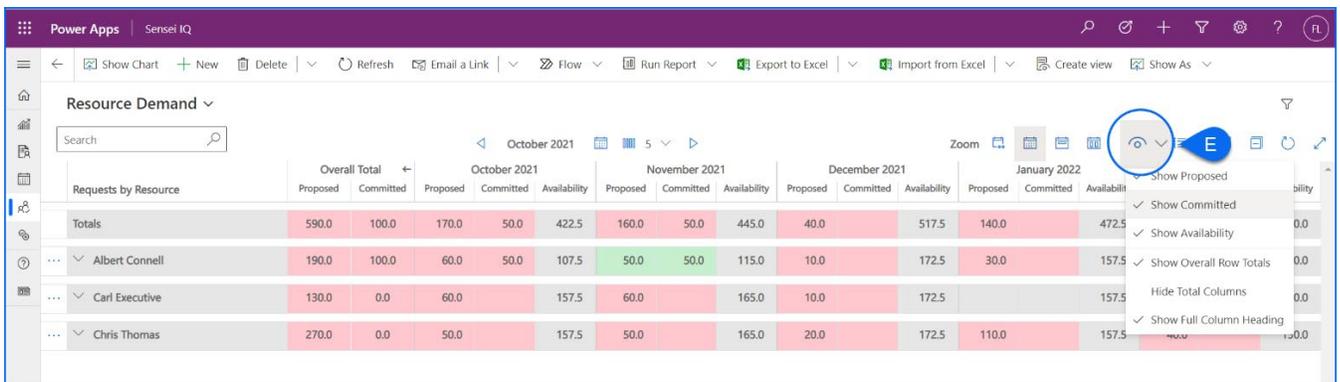


Important: If you opt to use the **Autofill** functionality, committed hours recorded in all visible periods displayed on the page are automatically populated by default. Ensure that you apply the appropriate fixed value for the number of **periods** that you want to remain visible on the page before 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.



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



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

Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
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	450.0			
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	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	0.0	50.0		157.5	50.0		165.0	20.0	172.5	110.0	157.5	40.0	150.0			

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.

Requests by Project	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	
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	450.0			
Sensei IQ Resource Management L...	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	450.0			

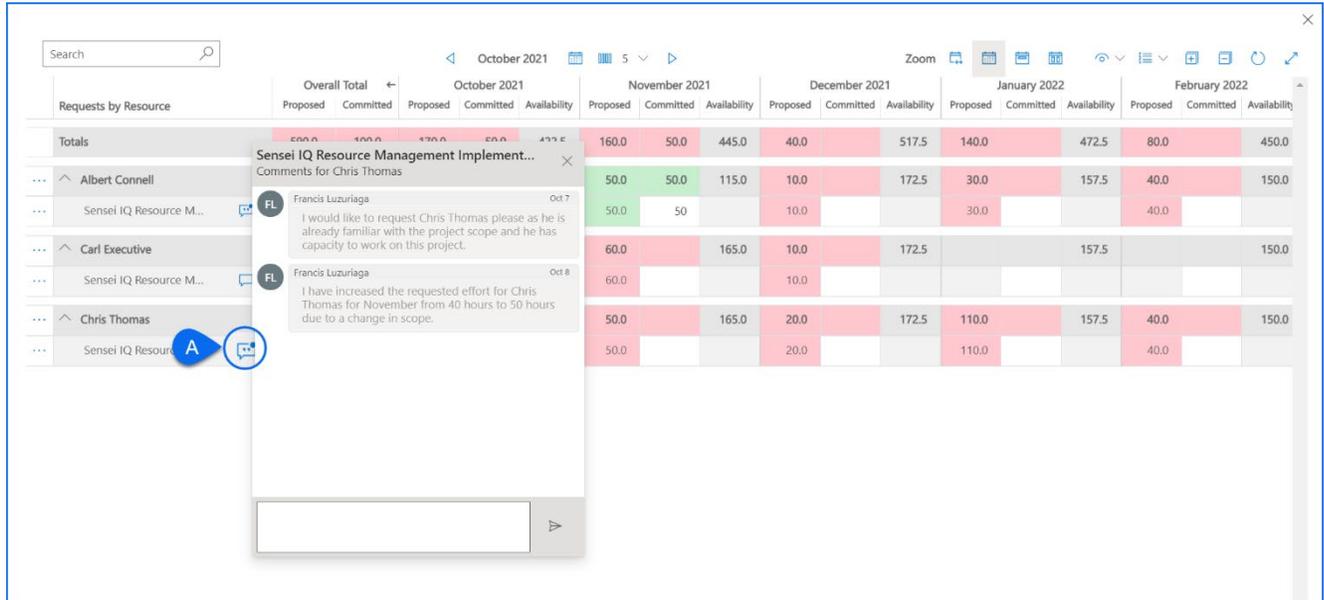
Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	
Totals	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	450.0			
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	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	0.0	50.0		157.5	50.0		165.0	20.0	172.5	110.0	157.5	40.0	150.0			

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

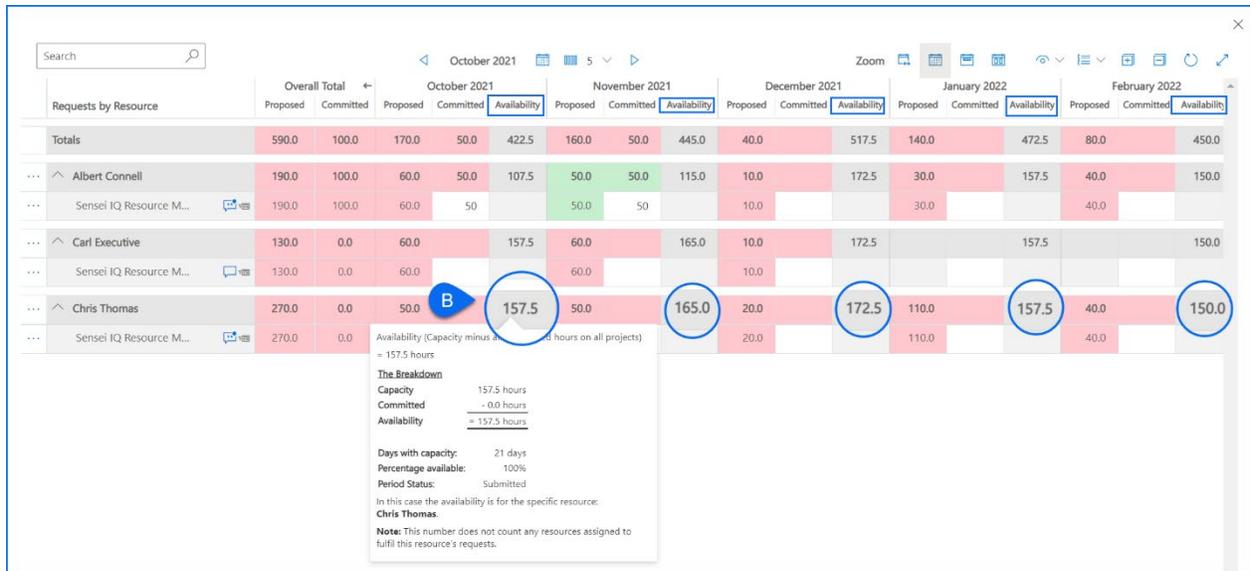
Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	
Totals	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	450.0			
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	150.0			
Sensei IQ Resource M...	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	172.5		157.5		150.0			
Sensei IQ Resource M...	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	172.5	110.0	157.5	40.0	150.0			
Sensei IQ Resource M...	270.0	0.0	50.0			50.0			20.0		110.0		40.0				

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

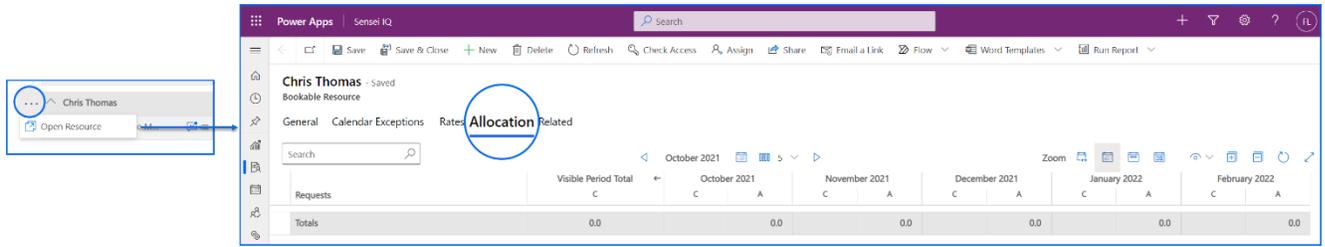
- a. Select a named resource row and review the **attached comments** on each request from the project manager individually.



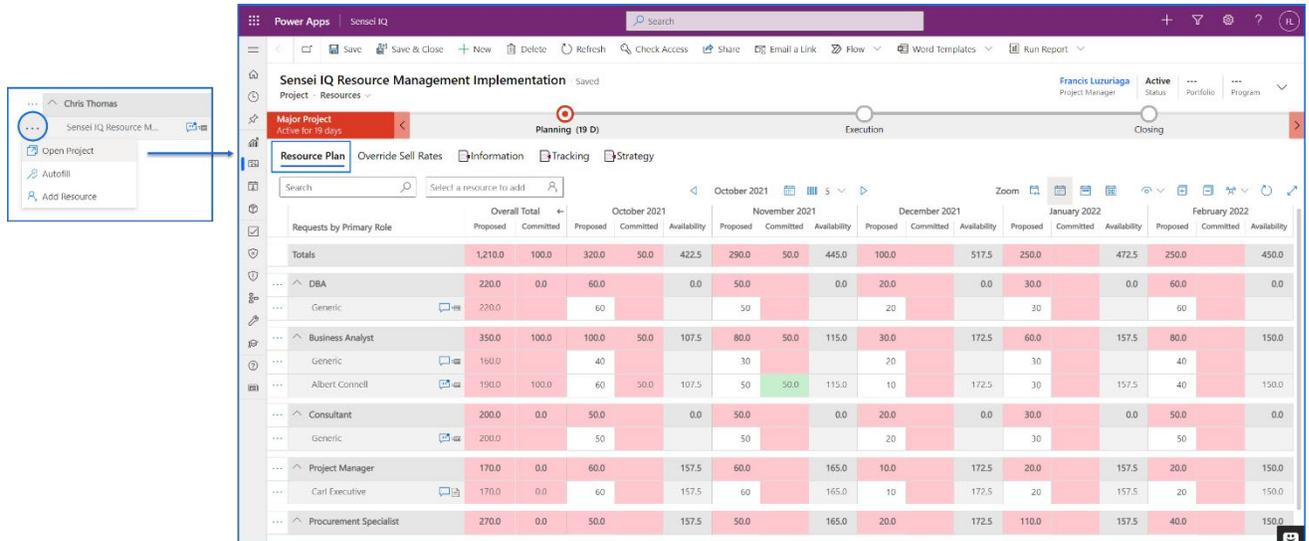
- b. Hide the comments and evaluate the remaining availability of the named resource individually in the **Availability** column or the **tooltip text** when you hover the mouse over each visible period.



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.



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.



- 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.



Tip: If you want to automatically fill the **Committed** cells with the proposed hours submitted (also referred to as **unfulfilled submissions**) against **all** pending requests from **all** 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.

Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	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	50.0	50		50.0	50		20.0	20		110.0	110		40.0	40	

- 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.

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.

Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	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	50.0	50.0		50.0	50.0		20.0	20.0		110.0	110.0		40.0	40.0	

Proposed Hours = 50.0 hours
Period Status: Approved
 click the value to copy to committed and ✓ approve this period (availability permitting).

Committed Hours = 50.0 hours
Period Status: Approved

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.

Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
Chris Thomas	270.0	0.0	50.0		157.5	50.0		165.0	20.0		172.5	110.0		157.5	40.0		150.0
Sensei IQ Resource M...	270.0	0.0							20.0			110.0			40.0		

Availability (Capacity minus all committed hours on all projects) = 157.5 hours

The Breakdown
 Capacity: 157.5 hours
 Committed: -0.0 hours
 Availability: = 157.5 hours

Days with capacity: 21 days
 Percentage available: 100%
 Period Status: Submitted
 In this case the availability is for the specific resource: **Chris Thomas**
 Note: This number does not count any resources assigned to fulfill this resource's requests.

Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	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							20.0	20.0		110.0	110.0		40.0	40.0	

Availability (Capacity minus all committed hours on all projects) = 107.5 hours

The Breakdown
 Capacity: 157.5 hours
 Committed: -50.0 hours
 Availability: = 107.5 hours

Days with capacity: 21 days
 Percentage available: 68%
 Period Status: Approved
 In this case the availability is for the specific resource: **Chris Thomas**
 Note: This number does not count any resources assigned to fulfill this resource's requests.

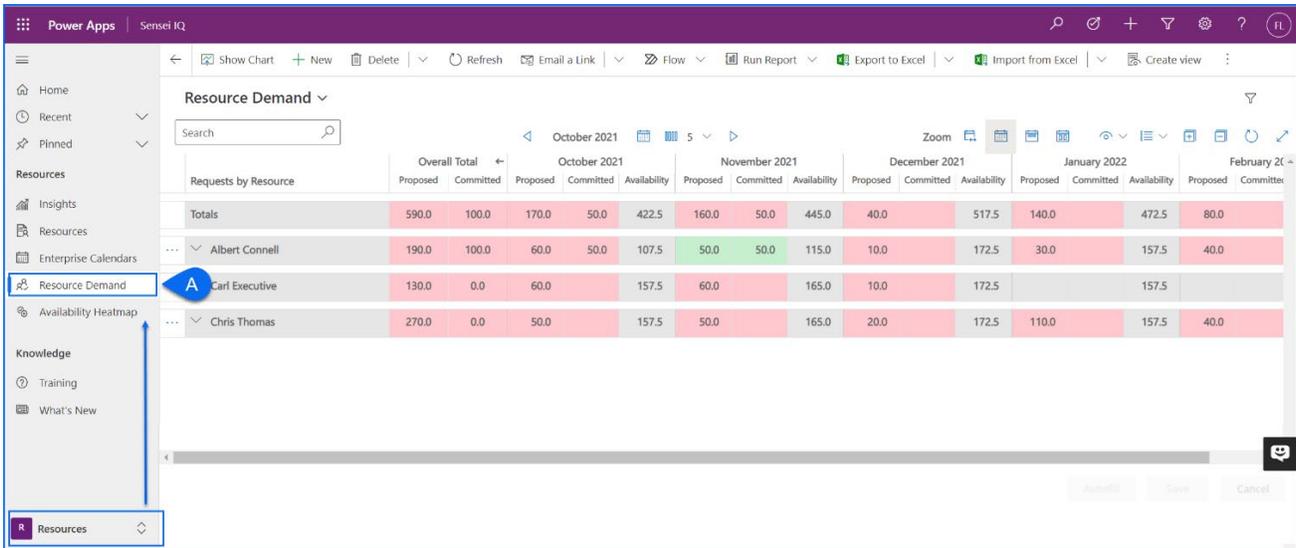
Modify and approve a request for named resources

Resource Manager

Resources > Resources > Resource Demand

1. SET THE RESOURCE DEMAND HORIZON

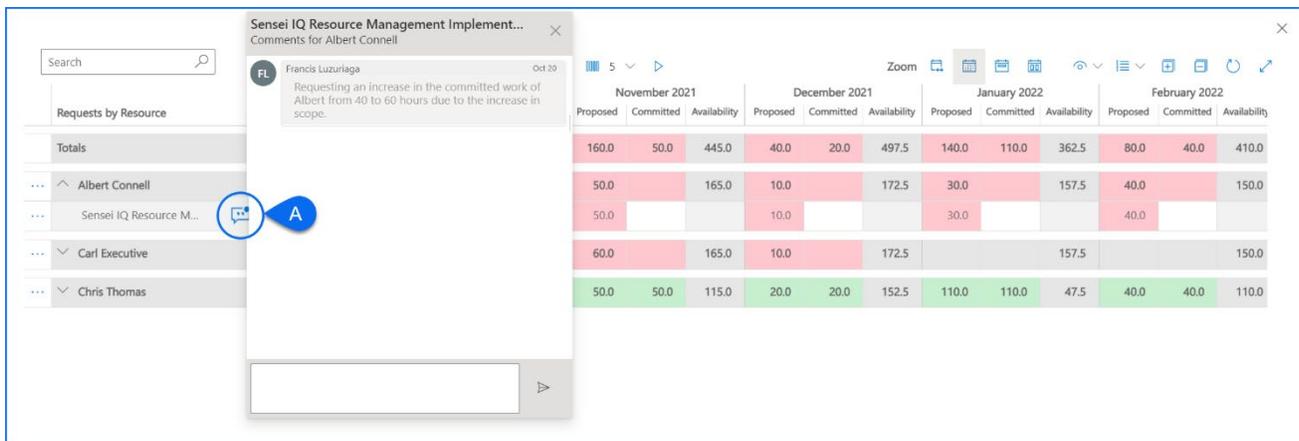
- a. Ensure that you are in the **Resources** area and click **Resource Demand** in the **Resources** section.



- 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.

The screenshot shows a resource availability table with columns for months from October 2021 to February 2022. Each month has sub-columns for Proposed, Committed, and Availability. A tooltip is displayed over the 'Availability' cell for Albert Connell in October 2021, showing a breakdown of Capacity (157.5 hours), Committed (0.0 hours), and Availability (157.5 hours). The tooltip also includes 'Days with capacity: 21 days', 'Percentage available: 100%', and 'Period Status: Set by approver'. A note at the bottom states: 'Note: This number does not count any resources assigned to fulfill this resource's requests.'

- 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.

The screenshot shows the same resource availability table as in part (b). In the 'Committed' column for October 2021, the value '30' has been entered for the 'Sense IQ Resource M...' row. The 'Availability' for that row is now 127.5. The 'Committed' column for November 2021 also shows '30' for the same resource, with an availability of 135.0.

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.

The screenshot shows the resource availability table with a tooltip over the 'Proposed' cell for 'Sense IQ Resource M...' in December 2021. The tooltip text reads: 'Proposed Hours = 10.0 hours', 'Period Status: Approved', and 'Click the value to copy to committed and approve this period (availability permitting)'. A mouse cursor is shown clicking on the '10.0' value in the 'Proposed' cell, and the 'Committed' cell for that period now contains '10.0'.

- 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.

Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
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	390.0
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	130.0
Sensei IQ Resource M...	190.0	120.0	60.0	30		50.0	30		10.0	10		30.0	30		40.0	20	
Autofill	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150.0
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

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.

Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
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	390.0
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	130.0
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	130.0
Bob Melvin		0.0			157.5			165.0			172.5			157.5			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	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

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.

Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
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	390.0
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	130.0
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		45.0		20	137.5		10	155.0			172.5			157.5		15	135.0
Bob Melvin		25.0		10	147.5		10	155.0			172.5			157.5		5	145.0
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	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

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.

Requests by Resource	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	590.0	450.0	392.5	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
Albert Connell	190.0	180.0	127.5	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...	190.0	110.0	137.5	60.0	30.0	137.5	50.0	30.0	155.0	10.0	10.0	172.5	30.0	20.0	157.5	40.0	20.0	135.0
Bill Collett	45.0	20.0	137.5			137.5			155.0			172.5			157.5		15.0	135.0
Bob Melvin	25.0	10.0	147.5			147.5			155.0			172.5			157.5		5.0	145.0
Carl Executive	130.0	0.0	157.5	60.0	0.0	157.5	60.0	0.0	165.0	10.0	0.0	172.5			157.5			150.0
Chris Thomas	270.0	270.0	107.5	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

- 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.

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.

Requests by Resource	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	590.0	450.0	392.5	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
Albert Connell	190.0	180.0	127.5	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...	190.0	180.0	137.5	Proposed Hours = 60.0 hours			Committed Hours = 50.0 hours			Committed Hours = 10.0 hours			30.0	20.0	137.5	40.0	40.0	130.0
Bill Collett		45.0	137.5	The Breakdown: Capacity 157.5 hours, Committed (elsewhere) +30.0 hours, Committed (here) -60.0 hours, Net proposed (here) -0.0 hours, Proposed availability = 127.5 hours			The Breakdown: Capacity 165.0 hours, Committed (elsewhere) +20.0 hours, Committed (here) -50.0 hours, Availability = 135.0 hours			The Breakdown: Capacity 172.5 hours, Committed -10.0 hours, Availability = 162.5 hours					157.5	15	135.0	
Bob Melvin		25.0	147.5		10	147.5		10	155.0			172.5			157.5		5	145.0
Carl Executive	130.0	0.0	157.5	60.0	0.0	157.5	60.0	0.0	165.0	10.0	0.0	172.5			157.5			150.0
Chris Thomas	270.0	270.0	107.5	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

3. MODIFY AN EXISTING FULFILLED REQUEST FOR NAMED RESOURCES

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

Requests by Project	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	590.0	450.0	677.5	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 L...	590.0	450.0	677.5	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
Albert Connell	190.0	110.0	127.5	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
Bill Collett		45.0	137.5		20	137.5		10	155.0			172.5			157.5		15	135.0
Bob Melvin		25.0	147.5		10	147.5		10	155.0			172.5			157.5		5	145.0
Carl Executive	130.0	0.0	157.5	60.0	0.0	157.5	60.0	0.0	165.0	10.0	0.0	172.5			157.5			150.0
Chris Thomas	270.0	270.0	107.5	50.0	50	107.5	50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0

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.

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

Requests by Project	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	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 L...	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	110.0	

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

Requests by Project	Overall Total			October 2021			November 2021		
	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
Totals	590.0	430.0	170.0	110.0	677.5	160.0	80.0	745.0	
Sensei IQ Resource Management L...	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	30.0	135.0	

Committed Hours
= 30.0 hours

The Breakdown

Capacity	165.0 hours
Committed (elsewhere)	- 0.0 hours
Committed (here)	- 30.0 hours
Availability	= 135.0 hours

Days with capacity: 22 days
Percentage available: 82%
Period Status: Set by approver

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

Sensei IQ Resource Management Implement...
Comments for Chris Thomas

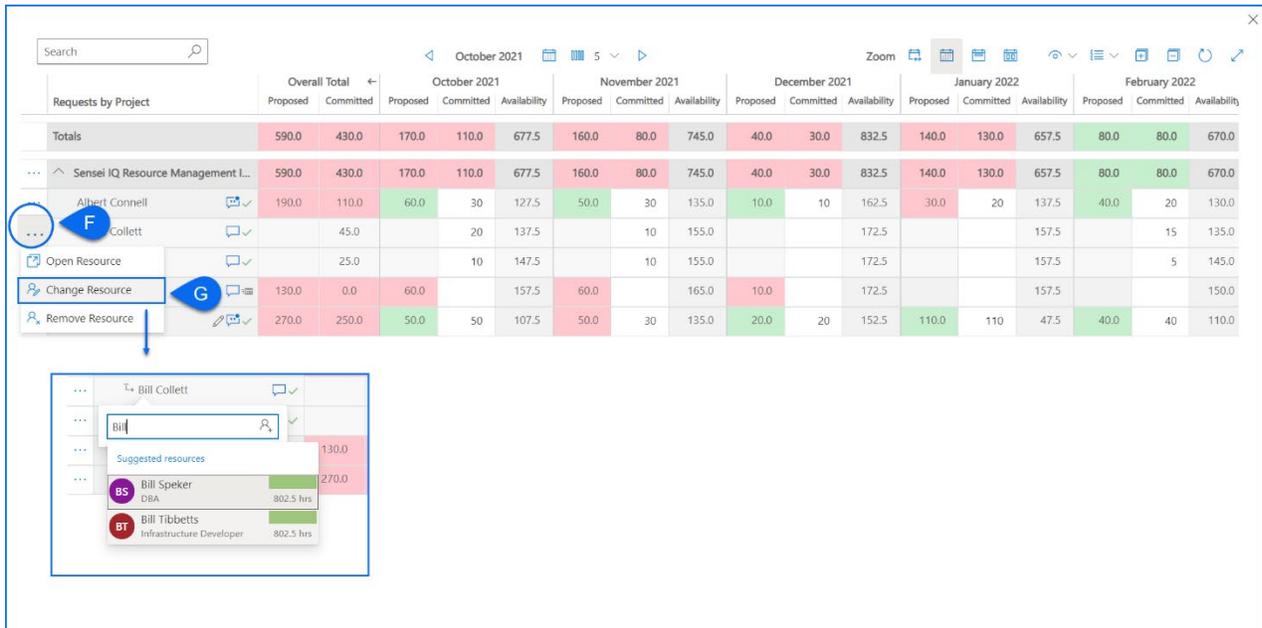
Francis Luzuriaga Oct 7
I would like to request Chris Thomas please as he is already familiar with the project scope and he has capacity to work on this project.

Francis Luzuriaga Oct 8
I have increased the requested effort for Chris Thomas for November from 40 hours to 50 hours due to a change in scope.

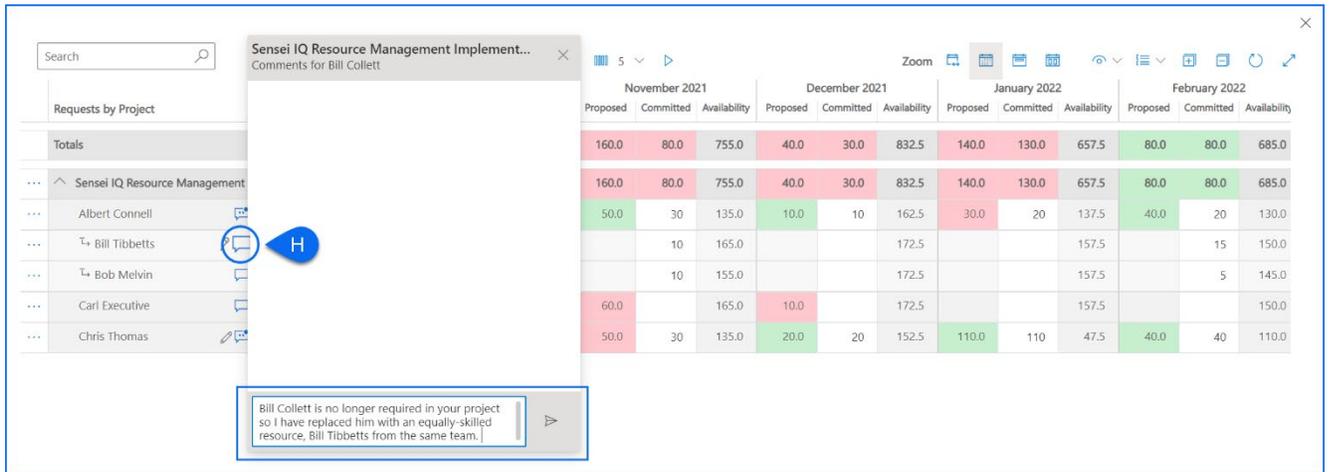
Francis Luzuriaga Oct 26
All proposed work for Chris in this project have been approved without any amendment from the original request.

- f. If you also need to replace any existing named resource that was originally allocated to the project as a backfill for 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.



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



- 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.

Requests by Project	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
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	685.0
Sensei IQ Resource Management L...	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	685.0
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
Bill Tibbetts		45.0		20	157.5		10	165.0			172.5			157.5		15	150.0
Bob Melvin		25.0		10	147.5		10	155.0			172.5			157.5		5	145.0
Open Resource	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150.0
Change 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	110.0
Remove Resource																	

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.

Requests by Project	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
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	685.0
Sensei IQ Resource Management L...	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	685.0
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
Bill Tibbetts		45.0		20	157.5		10	165.0			172.5			157.5		15	150.0
Bob Melvin		25.0		10	147.5		10	155.0			172.5			157.5		5	145.0
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
Bill Tibbetts		45.0		20	157.5		10	165.0			172.5			157.5		15	150.0

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

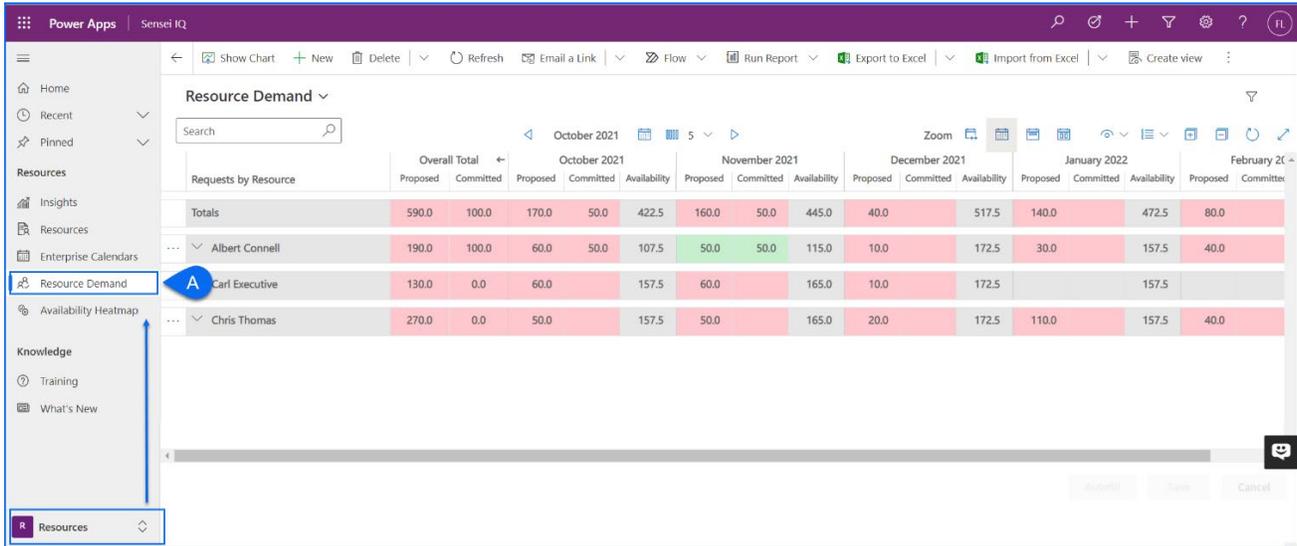
Requests by Project	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
Totals	590.0	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 L...	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
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

1. SET THE RESOURCE DEMAND HORIZON

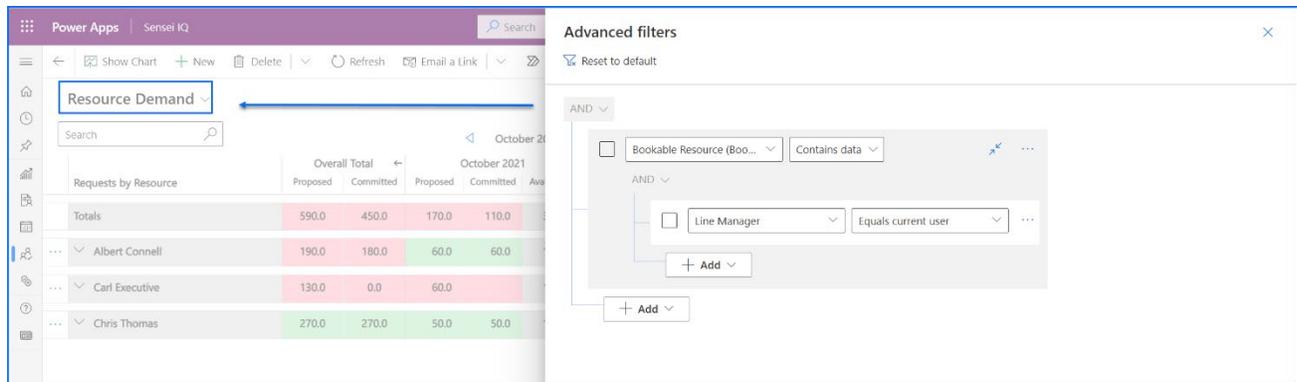
- a. Ensure that you are in the **Resources** area and click **Resource Demand** in the **Resources** section.



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

2. HARVEST THE REQUESTS FOR GENERIC RESOURCES

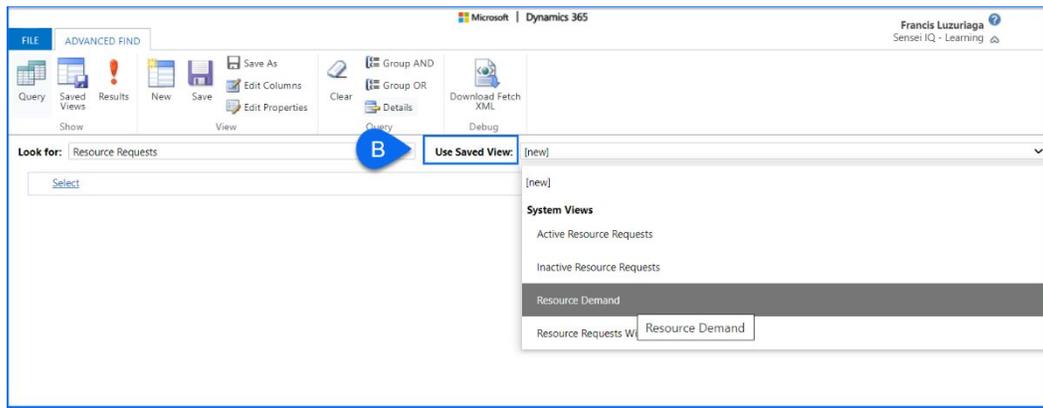
Important: The **Resource Demand** view in Sensei IQ has a system default filter to allow users to manage the demand for named resources that they are the line manager for only. Generic resources do not typically have fixed line managers. Unless the default system view is customized in your organization’s 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**).



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

Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	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
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
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	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

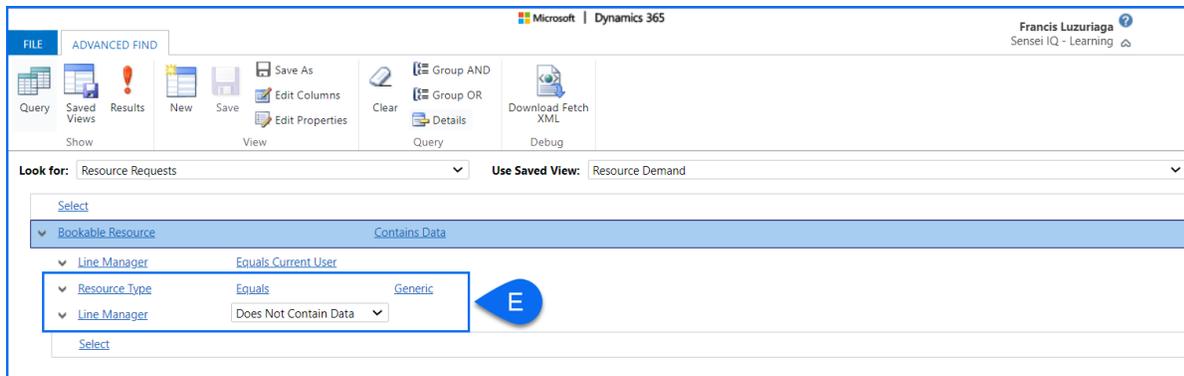
b. In the dialog box, select **Resource Demand** from the **Use Saved View** drop-down list.



c. Create two (2) additional filters to the selected view using the next blank rows.

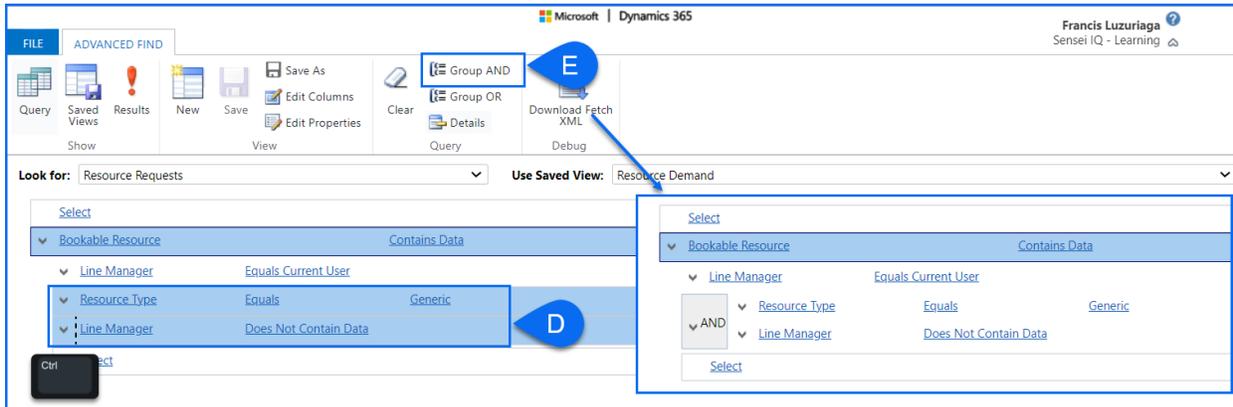
- **Resource Type – Equals - Generic**
- **Line Manager – Does Not Contain Data**

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



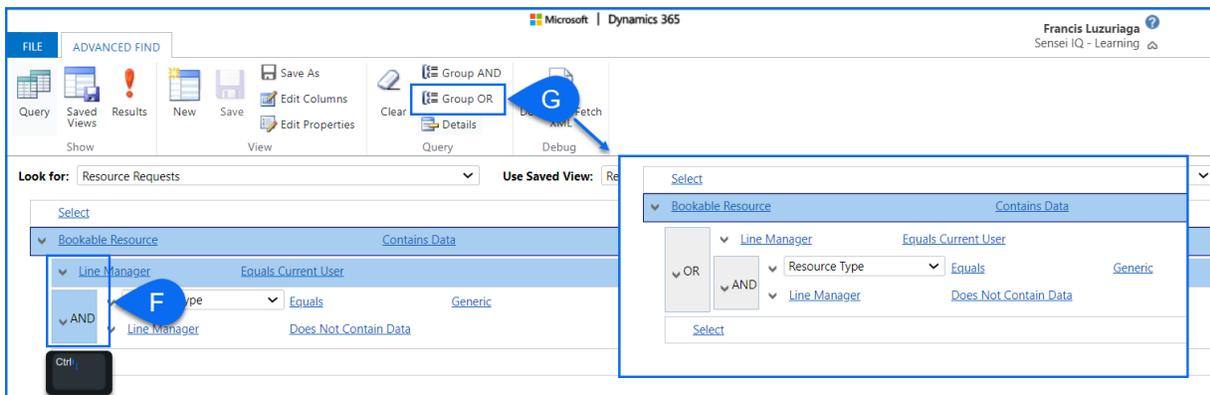
d. Press and hold the control key (**Ctrl**) on your keyboard and select the newly added filters in the view.

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



- 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.

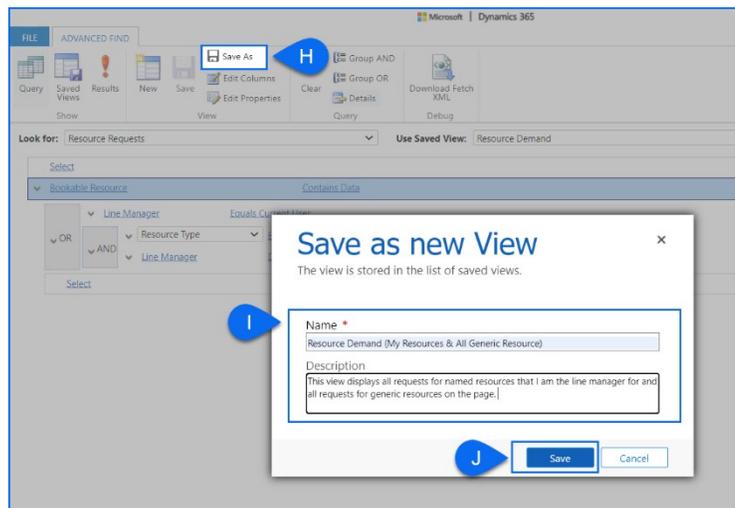
- g. Click the **Group OR** button from the **Advanced Find** ribbon then release the control key (**Ctrl**) on your keyboard.



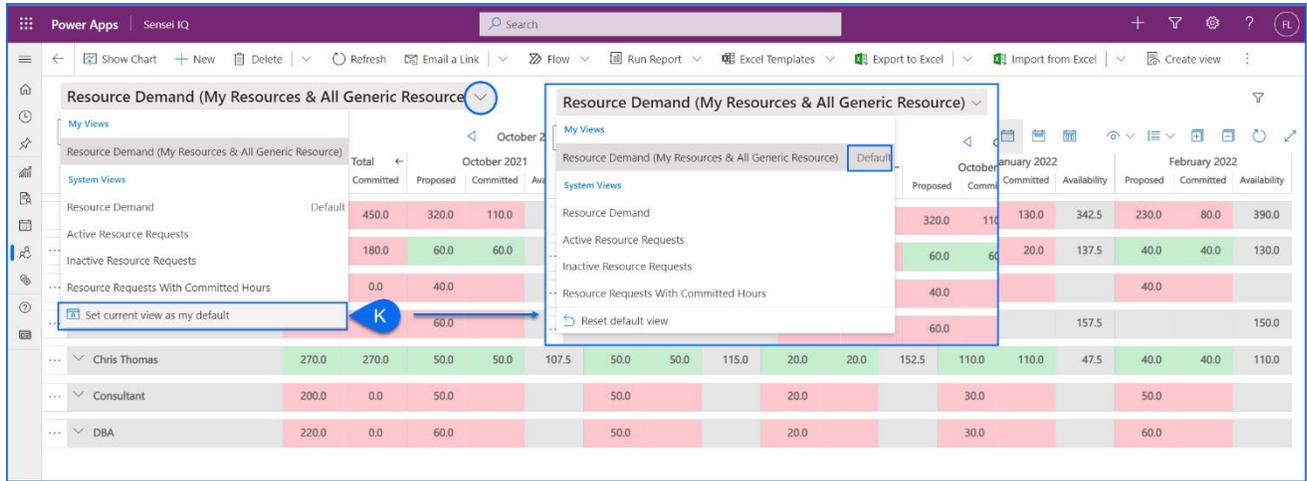
- h. Once you have set the custom filters and their grouping, click the **Save As** button from the **Advanced Find** ribbon.

- i. In the **Save as new View** dialog box, provide a unique name for your custom personal view and a description (**recommended**).

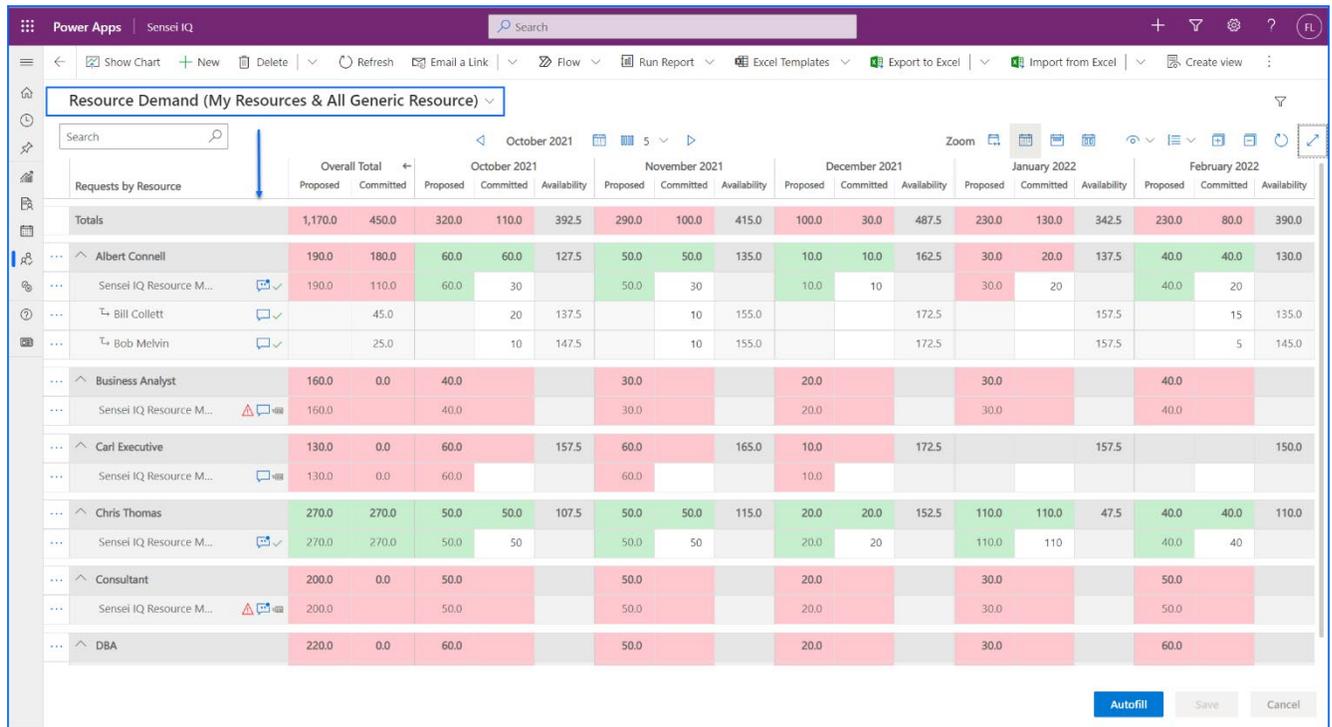
- j. Click the **Save** button and close the dialog box.



- 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.



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.



3. REVIEW AND FULFILL A REQUEST WITH NAMED RESOURCES

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

Overall Total	October 2021			November 2021			December 2021			January 2022			Project				
	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability					
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 Management 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	670.0
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	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
Bill Collett		45.0		20	137.5		10	155.0			172.5			157.5		15	135.0
Bob Melvin		25.0		10	147.5		10	155.0			172.5			157.5		5	145.0
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	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	110.0

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

Sensei IQ Resource Management Implement...
Comments for Consultant

FL Francis Luzuriaga Oct 7
I would like to request Brice Center if he is available for part or whole of the requested duration given his expertise and experience.

FL Francis Luzuriaga Oct 7
I have increased the requested effort for a Consultant role for November from 40 hours to 50 hours due to a change in scope.

Overall Total	November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
Totals	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 Management	290.0	100.0	725.0	100.0	30.0	832.5	230.0	130.0	657.5	230.0	80.0	670.0
Business Analyst	30.0			20.0			30.0			40.0		
Consultant	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	130.0
Bill Collett		10	155.0			172.5			157.5		15	135.0
Bob Melvin		10	155.0			172.5			157.5		5	145.0
Carl Executive	60.0		165.0	10.0		172.5			157.5			150.0
Chris Thomas	50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0

- 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.

Requests by Project	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	450.0	677.5	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 Management L...	1,170.0	450.0	677.5	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
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		
Bill Collett						107.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	130.0
Bob Melvin						147.5		10	155.0			172.5			157.5		5	145.0
Carl Executive						157.5	60.0		165.0	10.0		172.5			157.5			150.0
Chris Thomas						107.5	50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0

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.

Requests by Project	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	650.0	785.0	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	770.0
Sensei IQ Resource Management L...	1,170.0	650.0	785.0	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	770.0
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		
Brice Center		200.0	107.5		50	107.5		50	115.0		20	152.5		30	127.5		50	100.0
DBA	220.0			60.0			50.0			20.0			30.0			60.0		
Albert Connell	190.0	110.0	127.5	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
Bill Collett		45.0	137.5		20	137.5		10	155.0			172.5			157.5		15	135.0
Bob Melvin		25.0	147.5		10	147.5		10	155.0			172.5			157.5		5	145.0
Carl Executive	130.0	0.0	157.5	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150.0
Chris Thomas	270.0	270.0	107.5	50.0	50	107.5	50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0

- 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.

Requests by Project	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
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	1,070.0
Sensei IQ Resource Management...	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	1,070.0
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	200.0		50.0			50.0			20.0			30.0			50.0		
Brice Center	105.0		30		127.5	30		135.0	10		162.5	15		142.5	20		130.0
Jason Huebner	40.0		10		147.5	10		155.0	0		172.5	10		147.5	10		140.0
Walt Nickel	50.0		10		147.5	10		155.0	10		162.5	0		157.5	10		130.0
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
Bill Collett	45.0		20		137.5	10		155.0			172.5			157.5			135.0
Bob Melvin	25.0		10		147.5	10		155.0			172.5			157.5			145.0
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	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	110.0

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 either less 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**).

Sensei IQ Resource Management Implement... Comments for Consultant

Francis Luzuriaga Oct 7
I would like to request Brice Center if he is available for part or whole of the requested duration given his expertise and experience.

Francis Luzuriaga Oct 7
I have increased the requested effort for a Consultant role for November from 40 hours to 50 hours due to a change in scope.

Sensei IQ Resource Management Implement... Comments for Jason Huebner

I have committed Brice Centre as requested but only partially. I have also allocated Jason H and Walt N to fulfill the request for a Consultant.

I have also allocated Jason H and Walt N to fulfill the request for a Consultant.

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

Requests by Project	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
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	1,070.0
Sensei IQ Resource Management L...	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	1,070.0
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	200.0		50.0			50.0			20.0			30.0			50.0		
Brice Center		105.0		30			0	135.0		10	162.5		15	142.5		20	130.0
Jason Huebner		40.0		10			0	155.0					10	147.5		10	140.0
Walt Nickel		50.0		10			147.5	155.0					0	157.5		20	130.0
Albert Connell	190.0	110.0	60.0	30	127.5	50.0	30	135.0				30.0	20	137.5	40.0	20	130.0
Bill Collett		45.0		20	137.5		10	155.0						157.5		15	135.0
Bob Melvin		25.0		10	147.5		10	155.0						157.5		5	145.0
Carl Executive	130.0	0.0	60.0		157.5	60.0		165.0						157.5			150.0
Chris Thomas	270.0	270.0	50.0	50	107.5	50.0	50	115.0				110.0	110	47.5	40.0	40	110.0

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.

- h. 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 **Modify an existing fulfilled request for named resources** 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.