

Overview

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

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

This process allows your organisation's line managers and project managers to negotiate and record an "agreement" to make sure that work resources are being utilised appropriately and effectively.

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

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

Submit a request for generic resources



Project Manager



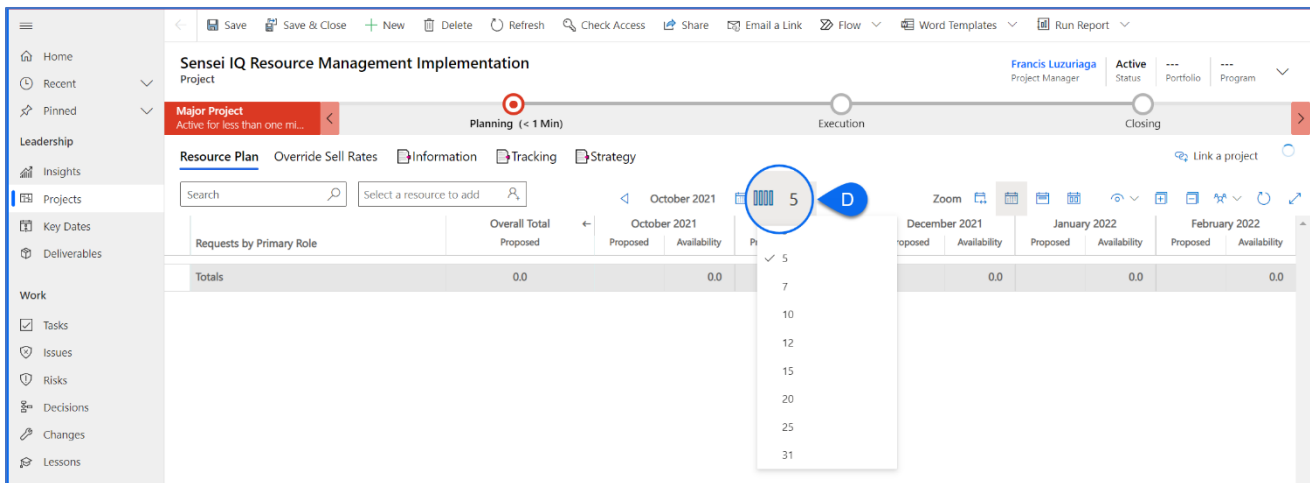
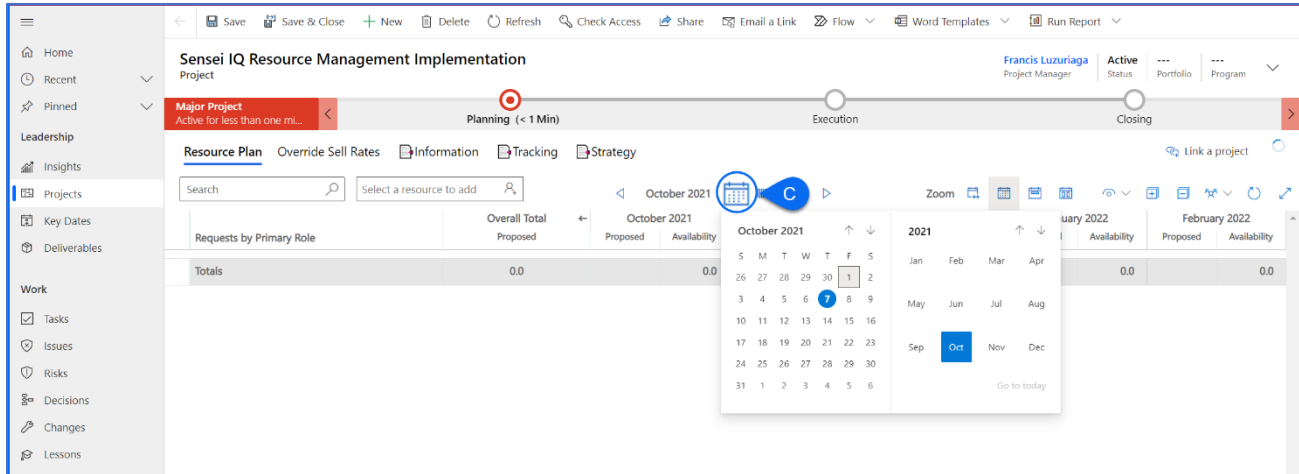
Projects - Resource Plan

1. SET THE RESOURCE DEMAND HORIZON

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

Requests by Primary Role	Overall Total	October 2021	November 2021	December 2021	January 2022	February 2022	
	Proposed	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals	0.0	0.0	0.0	0.0	0.0	0.0	

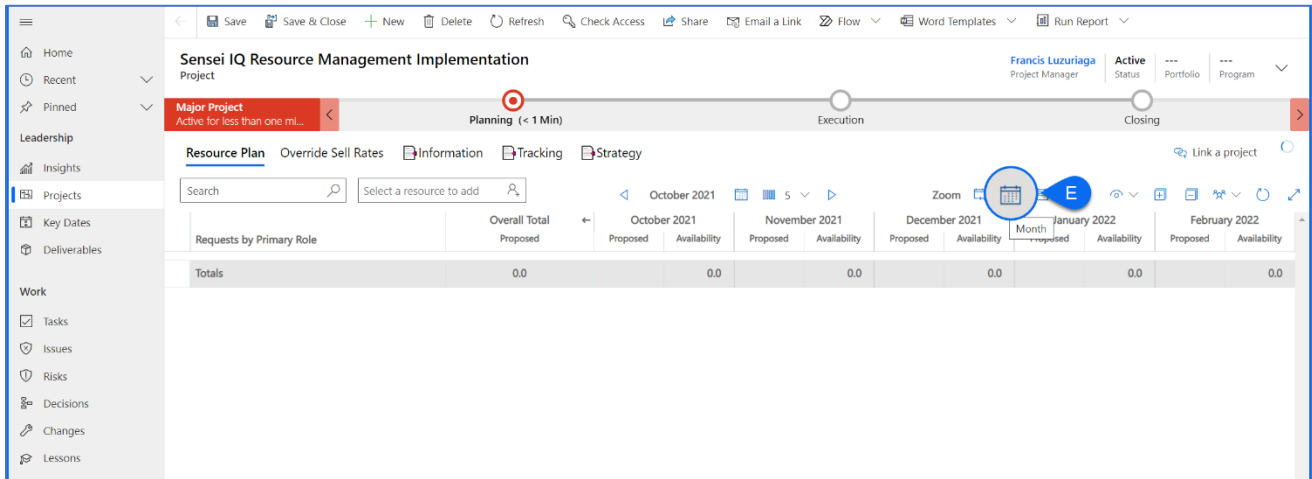
- c. Change the selected **date** for the first period that you require the generic resources from.



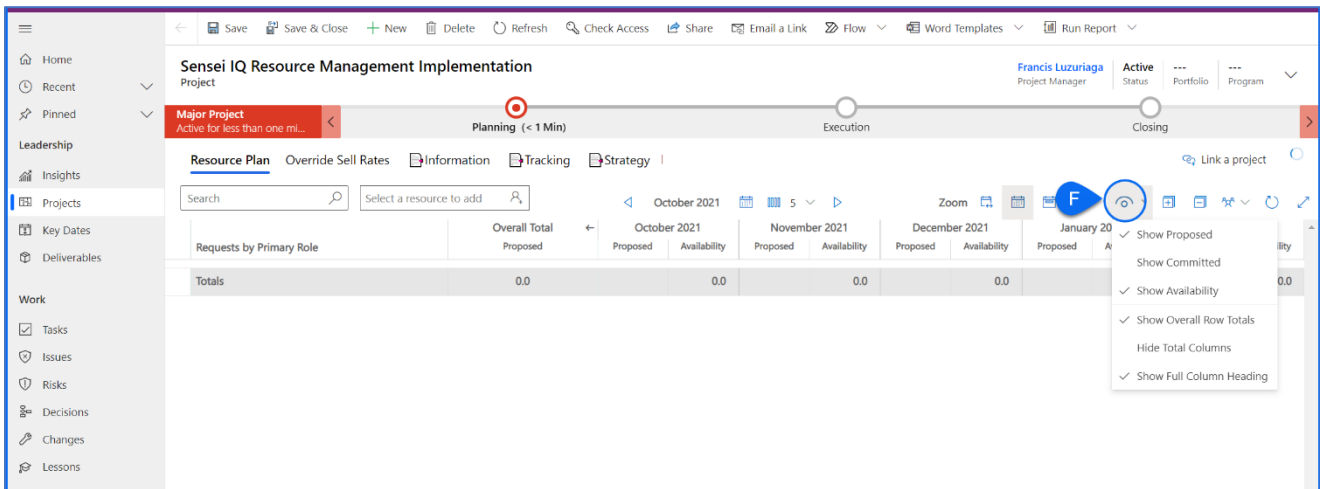
- d. Set the number of **periods** you want to be visible on the page.

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

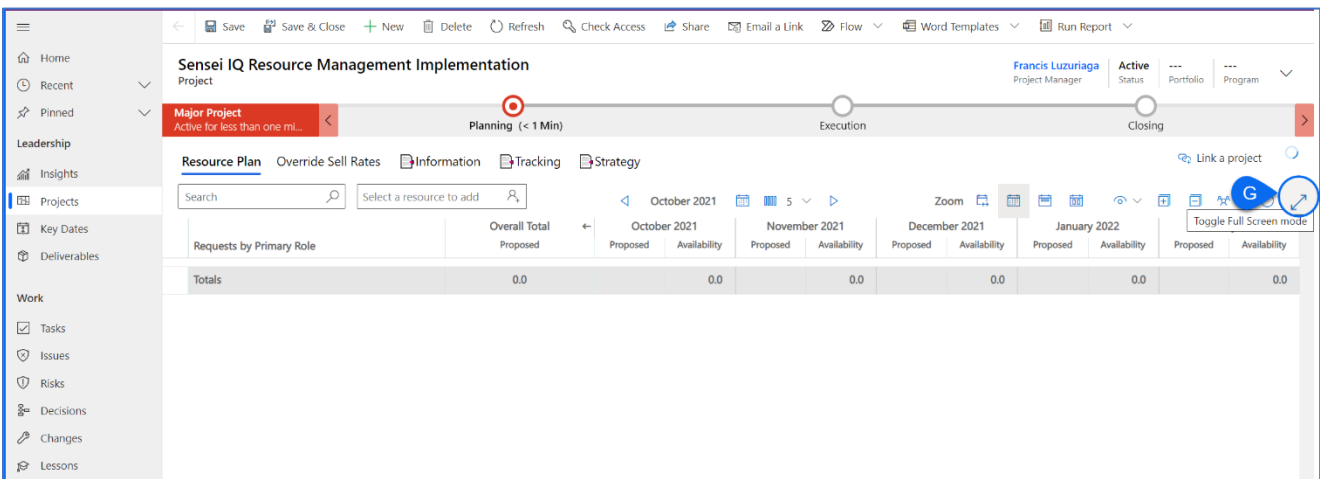
- e. Set the **timescale** of the requested period using the **Zoom** feature.



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



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



2. CREATE AND SUBMIT A REQUEST FOR GENERIC RESOURCES

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

The screenshot shows the 'Sensei IQ Resource Management Implementation' project in the 'Resource Plan' tab. On the left, a list of 'Suggested resources' includes roles like Chris Thomas (Procurement Specialist), Cindy Process (Product Tester), Connie Campaign (Marketing), Consultant (Generic), Craig Counsell (Business Analyst), Dan MacDonald (Infrastructure Developer), and DBA (Generic). On the right, a grid displays resource availability across months from October 2021 to February 2022. A blue circle highlights the 'Select a resource to add' button, and a blue arrow points to the 'Add Resource to Plan' button.

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

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

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

Search Select a resource to add

October 2021 November 2021 December 2021 January 2022 February 2022

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

Submit and Save Save

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

Consultant	190.0	50.0
Generic	190.0	50

The visible period for this request is currently Draft

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

Search Select a resource to add

October 2021 November 2021 December 2021 January 2022 February 2022

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

Sensei IQ Resource Management Implement...
Comments for Consultant
Francis Luzuriaga
I would like to request Brice Center if he is available for part or whole of the requested duration given his expertise and experience.

Submit and Save Save

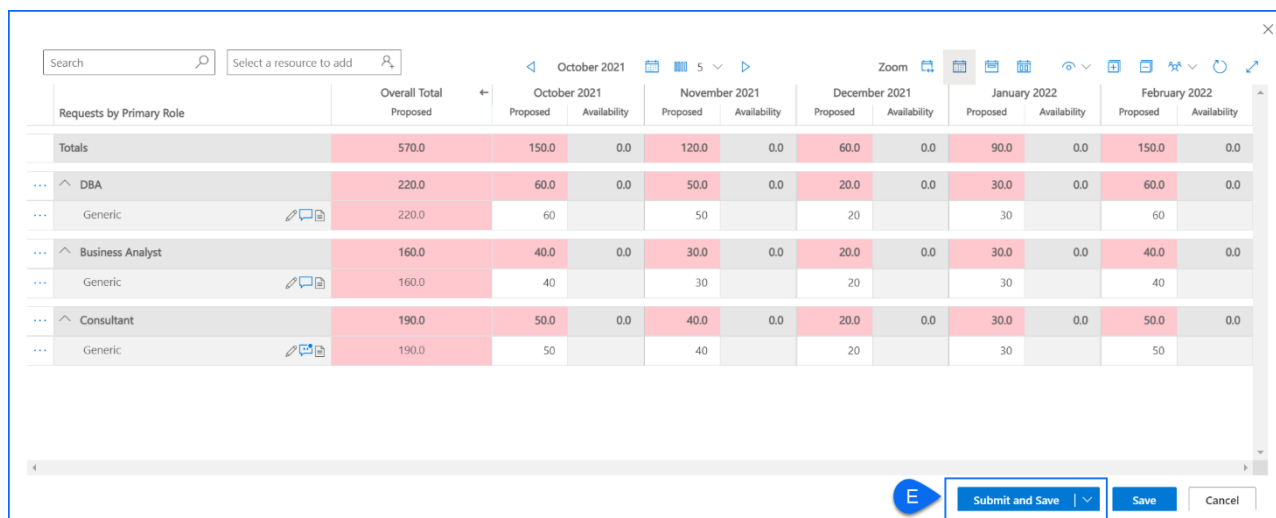
Tip: You can click the **Row Menu** button (...) in front of the generic resource role row to view more options including **Submit** that allows you to submit each resource request for the visible periods or **Remove Resource** to delete the resource request from the list individually.

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

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

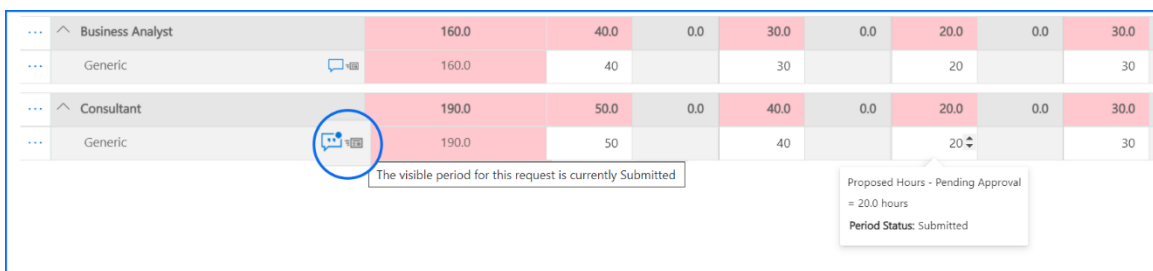
Requests by Primary Role		Overall Total Proposed	October 2021		November 2021		December 2021		January 2022		February 2022	
			Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability	Proposed	Availability
Totals		570.0	150.0	0.0	120.0	0.0	60.0	0.0	90.0	0.0	150.0	0.0
...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

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



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

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



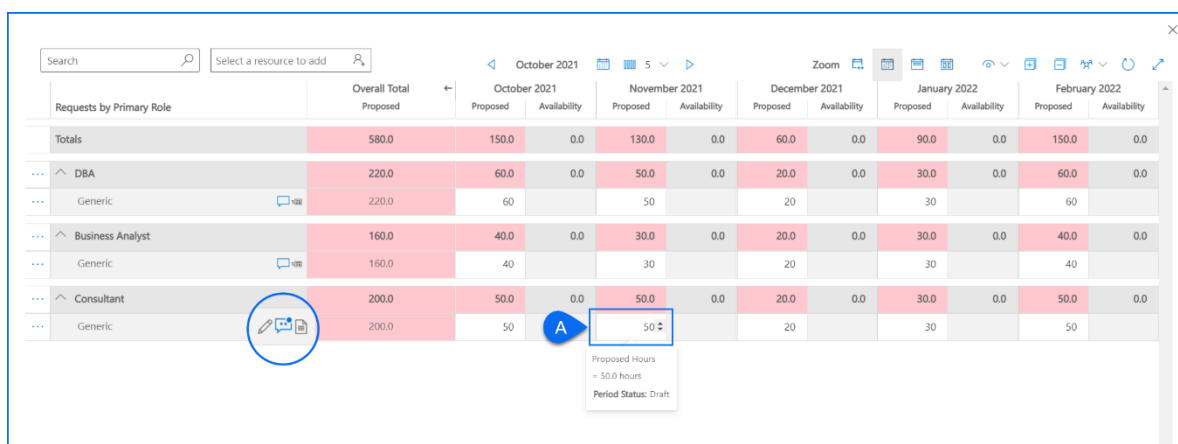
Business Analyst	160.0	40.0	0.0	30.0	0.0	20.0	0.0	30.0
Generic	160.0	40		30		20		30
Consultant	190.0	50.0	0.0	40.0	0.0	20.0	0.0	30.0
Generic	190.0	50		40		20		30

The visible period for this request is currently Submitted

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

3. MODIFY A SUBMITTED REQUEST FOR GENERIC RESOURCES

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



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

Proposed Hours = 50.0 hours
Period Status: Draft

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

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

The screenshot shows the Altus resource request interface. A table displays resource requests by primary role across months from October 2021 to February 2022. The roles listed are DBA, Business Analyst, and Consultant. A comment box is open for the Consultant role, showing a comment from Francis Luzuriaga. A blue circle 'B' highlights the comment icon for the Consultant role.


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

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

The screenshot shows the Altus resource request interface with the row menu open for the Consultant role. The menu options are: Open Resource, Submit, Change visible periods, and Remove Resource. A blue circle 'C' highlights the row menu button, and a blue circle 'D' highlights the Submit button.

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

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

...	Consultant		200.0	50.0	0.0	50.0
...	Generic		200.0	50		50

The visible period for this request is currently Submitted

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

Search

Select a resource to add

October 2021

November 2021

December 2021

January 2022

February 2022

Zoom

<

Submit a request for named resources



Project Manager



Projects - Resource Plan

1. SET THE RESOURCE DEMAND HORIZON

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

<div> <div>Home</div> <div>Recent</div> <div>Pinned</div> <div>Leadership</div> <div>Projects</div> <div>Key Dates</div> <div>Deliverables</div> <div>Work</div> <div>Tasks</div> <div>Issues</div> <div>Risks</div> <div>Decisions</div> <div>Changes</div> <div>Lessons</div> </div>		<div> <div>Save</div> <div>Save & Close</div> <div>New</div> <div>Delete</div> <div>Refresh</div> <div>Check Access</div> <div>Share</div> <div>Email a Link</div> <div>Flow</div> <div>Word Templates</div> <div>Run Report</div> </div> <div> <div>Sensei IQ Resource Management Implementation</div> <div>Project</div> <div>Francis Luzuriaga</div> <div>Project Manager</div> <div>Active</div> <div>Status</div> <div>Portfolio</div> <div>Program</div> </div> <div> <div>Major Project</div> <div>Active for less than one mi...</div> <div>Planning (< 1 Min)</div> <div>Execution</div> <div>Closing</div> </div> <div> <div>Details</div> <div>Key Dates</div> <div>Tasks</div> <div>Financials</div> <div>Resources</div> <div>Strategy</div> <div>Resource Plan</div> <div>Override Sell Rates</div> <div>Information</div> <div>Tracking</div> <div>Strategy</div> <div>Link a project</div> </div> <div> <div>Search</div> <div>Select a resource to add</div> </div> <div> <div>October 2021</div> <div>November 2021</div> <div>December 2021</div> <div>January 2022</div> <div>February 2022</div> </div> <div> <div>Requests by Primary Role</div> <div>Overall Total</div> <div>Proposed</div> <div>Availability</div> <div>Proposed</div> <div>Availability</div> <div>Proposed</div> <div>Availability</div> <div>Proposed</div> <div>Availability</div> <div>Proposed</div> <div>Availability</div> </div> <div> <div>Totals</div> <div>0.0</div> <div>0.0</div> <div>0.0</div> <div>0.0</div> <div>0.0</div> <div>0.0</div> </div>											
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- c. Follow the same steps described in the **Submit a request for generic resources** section above.

2. CREATE AND SUBMIT A REQUEST FOR NAMED RESOURCES

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

The screenshot shows the 'Add Resource to Plan' interface. A search bar at the top left contains the text 'Select a resource to add'. Below it, a list of suggested resources is displayed, including Chris Thomas (Procurement Specialist), Cindy Process (Product Tester), Connie Campaign (Marketing), Carl Executive (Consultant), Craig Counsell (Business Analyst), and Dan MacDonald (Infrastructure Developer). Each resource is listed with their primary role, full name, and total available hours (802.5 hrs). The background shows a calendar view with columns for Proposed and Availability for each month from October 2021 to February 2022.

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

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

The screenshot shows the 'Requests by Primary Role' table. The table has columns for Proposed and Availability for each month from October 2021 to February 2022. A tooltip is displayed over the 'Proposed' column for Chris Thomas, showing the following breakdown:

Category	Hours
Proposed Hours	= 40.0 hours
The Breakdown	
Capacity	165.0 hours
Committed (elsewhere)	- 0.0 hours
Committed (here)	- 40.0 hours
Net proposed (here)	= 125.0 hours
Proposed availability	
Days with capacity:	22 days
Percentage available:	76%
Period Status:	Draft

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

Search Select a resource to add

October 2021 November 2021 December 2021 January 2022 February 2022

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

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

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

Search Select a resource to add

October 2021 November 2021 December 2021 January 2022 February 2022

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

Submit and Save Save

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

...	Procurement Specialist	260.0	50.0	157.5	40.0	165.0
...	Chris Thomas	260.0	50	157.5	40	165.0
						165.0
		Availability (Capacity minus all Committed hours on all projects)				
		= 157.5 hours				
		The Breakdown				
		Capacity	157.5 hours			165.0
		Committed (elsewhere)	- 0.0 hours			
		Committed (here)	- 0.0 hours			0.0
		Availability	= 157.5 hours			
		Days with capacity:	21 days			
		Percentage available	100%			
		Period Status:	Draft			
		Click the value to copy to Proposed.				

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

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

Sensei IQ Resource Management Implement...

Comments for Chris Thomas

Francis Luzuriaga

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.

Submit and Save

Save

Cancel

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

The screenshot shows the Altus Project Resource Requests interface. At the top, there is a search bar and a "Select a resource to add" button. Below this is a table with columns for months (October 2021, November 2021, December 2021, January 2022, February 2022) and rows for roles (DBA, Business Analyst, Consultant, Project Manager, Procurement Specialist). The table shows proposed hours and availability. A dropdown menu is open for the "Chris Thomas" resource under the "Procurement Specialist" role, showing options: "Open Resource", "Submit", "Change Resource", and "Remove Resource".

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

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

The screenshot shows the same Altus Project Resource Requests interface as the previous one, but with the "Remove Role" button highlighted for the "Chris Thomas" resource under the "Procurement Specialist" role.

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

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

3. MODIFY A SUBMITTED REQUEST FOR NAMED RESOURCES

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

The screenshot shows the 'Resource Plan' interface. At the top, there is a search bar with 'Chris' entered. Below it, a table displays resource requests. The table has columns for 'Overall Total', 'October 2021', 'November 2021', and 'December 2021', each with sub-columns for 'Proposed' and 'Availability'. A dropdown menu is open for 'Chris Thomas', showing a 'Proposed' column with a value of 50.0. A tooltip is visible over the 50.0 value, showing a breakdown of hours: Capacity (165.0), Committed (elsewhere) (-0.0), Committed (here) (-0.0), Net proposed (here) (-50.0), and Proposed availability (115.0). The 'Period Status' is shown as 'Draft'.

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

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

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

The screenshot shows the 'Resource Plan' interface with a comment box open for 'Chris Thomas'. The comment box contains the text: '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.' Below the comment box, there is a text input field with the text: 'I have increased the requested effort for Chris Thomas for November from 40 hours to 50 hours due to a change in scope.' The 'Proposed' column for 'Chris Thomas' is highlighted with a value of 50.0.

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

Chris

Select a resource to add

October 2021

Zoom

Requests by Primary Role

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

Open Resource

Submit

Submit visible periods

Change Resource

Remove Resource

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

Procurement Specialist	270.0	50.0	157.5	50.0
Chris Thomas	270.0	50	157.5	50

The visible period for this request is currently Submitted

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

Chris

Select a resource to add

October 2021

Zoom

Requests by Primary Role

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

Submit and Save

Save

Cancel

4. MODIFY AN EXISTING COMMITTED WORK FOR NAMED RESOURCES

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

Sensei IQ Resource Management Implementation

Project: Resources

Francis Luzuriaga, Project Manager

Active Status, Portfolio, Program

Major Project: Active for 13 days

Planning (13 D), Execution, Closing

Details, Key Dates, Tasks, Financials, Resources, Strategy, Resource Plan, Override Sell Rates, Information, Tracking, Strategy

Search, Select a resource to add

Requests by Primary Role	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	0.0	310.0		472.5	260.0		495.0	100.0		517.5	250.0		472.5	250.0		450.0
DBA	220.0	0.0	60.0		0.0	50.0		0.0	20.0		0.0	30.0					
Generic	220.0		60			50			20			30					
Business Analyst	310.0	0.0	90.0		157.5	50.0		165.0	30.0		172.5	60.0		157.5	80.0		150.0

Right-hand menu: Show Proposed, Show Committed, Show Availability, Show Overall Row Totals, Hide Total Columns, Show Full Column Heading

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

Sensei IQ Resource Management Implementation...

Comments for Albert Connell

Albert

Francis Luzuriaga, Project Manager

Approved 40 hours for October and November.

Requests by Primary Role	Proposed	Committed	Availability
Totals	290.0	50.0	445.0
Business Analyst	80.0	50.0	115.0
Albert Connell	50	50.0	115.0

Committed Hours = 50.0 hours

The Breakdown

Capacity 165.0 hours

Committed (elsewhere) - 0.0 hours

Committed (here) - 50.0 hours

Availability = 115.0 hours

Days with capacity: 22 days

Percentage available: 70%

Period Status: Submitted

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

Albert

resource to add

October 2021

November 2021

December 2021

January 2022

February 2022

Requests by Primary Role	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	100.0	310.0	50.0	422.5	260.0	50.0	445.0	100.0		517.5	250.0		472.5	250.0		450.0
Business Analyst	310.0	100.0	90.0	50.0	107.5	50.0	50.0	115.0	30.0		172.5	60.0		157.5	80.0		150.0
Albert Connell	150.0	100.0	50	50.0	107.5	20	50.0	115.0	10		172.5	30		157.5	40		150.0
Business Analyst	320.0	100.0	100.0	50.0	107.5	50.0	50.0	115.0	30.0		172.5						
Albert Connell	160.0		60	50.0	107.5	20	50.0	115.0	10		172.5						

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

Requests by Primary Role	Overall Total		October 2021			November 2021		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability
Totals	1,180.0	100.0	320.0	50.0	422.5	260.0	50.0	445.0
Business Analyst	320.0	100.0	100.0	50.0	107.5	50.0	50.0	115.0
Albert Connell	160.0	100.0	60	50.0	107.5	20	50.0	115.0

Committed Hours
= 50.0 hours

The Breakdown

Capacity 157.5 hours

Committed (elsewhere) - 0.0 hours

Committed (here) - 50.0 hours

Availability = 107.5 hours

Days with capacity: 21 days

Percentage available: 68%

Period Status: **Draft**

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

Albert

Requests by Primary Role

Totals

Business Analyst

Albert Connell

Sensei IQ Resource Management Implement...

Comments for Albert Connell

Francis Luzuriaga 43m

Approved 40 hours for October and November.

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

October 2021

November 2021

December 2021

January 2022

February 2022

Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
260.0	50.0	445.0	100.0	517.5	250.0	472.5	250.0	450.0			
50.0	50.0	115.0	30.0	172.5	60.0	157.5	80.0	150.0			
20	50.0	115.0	10	172.5	30	157.5	40	150.0			

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

The screenshot shows the Altus resource request interface. At the top, there is a search bar with 'Albert' and a 'Select a resource to add' dropdown. Below this is a table with columns for 'Requests by Primary Role', 'Overall Total', and months from October 2021 to February 2022. The table has sub-columns for 'Proposed', 'Committed', and 'Availability'. A context menu is open for 'Albert Connell', showing options: 'Open Resource', 'Submit', 'Submit visible periods', and 'Remove Resource'. The 'Submit' option is highlighted with a blue circle and a letter 'F'.

Requests by Primary Role	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	1,210.0	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			
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			
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			

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

The screenshot shows a detailed breakdown for 'Albert Connell'. A blue circle highlights the 'Proposed' column for October 2021, which contains the value '60'. A tooltip is displayed over this value, showing the following information:

- Proposed Hours - Pending Approval = 60.0 hours
- The Breakdown**
- Capacity = 157.5 hours
- Committed (elsewhere) = 0.0 hours
- Committed (here) = 50.0 hours
- Net proposed (here) = 10.0 hours
- Proposed availability = 97.5 hours
- Days with capacity: 21 days
- Percentage available: 62%
- Period Status: **Submitted**

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

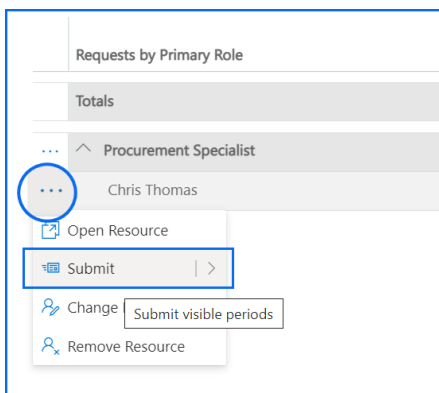
The screenshot shows the Altus resource request interface with the 'Submit and Save' and 'Save' buttons highlighted at the bottom right. The table from the previous screenshot is visible, showing the resource request for 'Albert Connell'.

Requests by Primary Role	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	1,210.0	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			
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			
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			

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

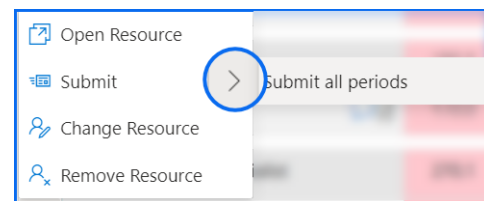
#1

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



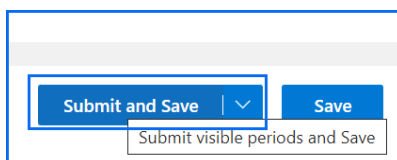
#2

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



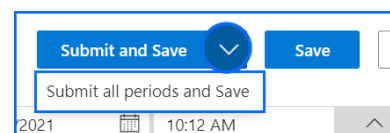
#3

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



#4

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



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