

Overview

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

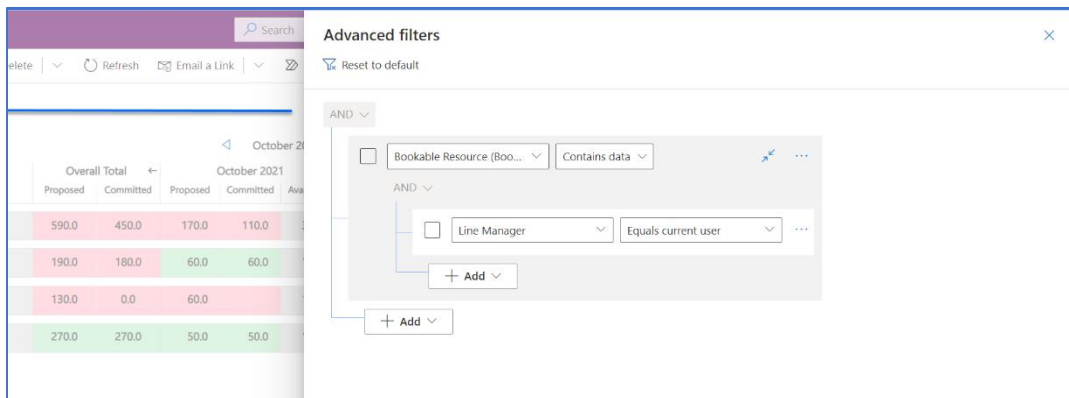
Work resources have defined availability and may have their time scheduled by a line manager in your organisation. When a project manager submits a request for resources to support an approved project, the request is routed to the appropriate line managers for review and approval. If Resource Approval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

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

Using the **Resource Demand** page, 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 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 organisation requires you to view all resources.



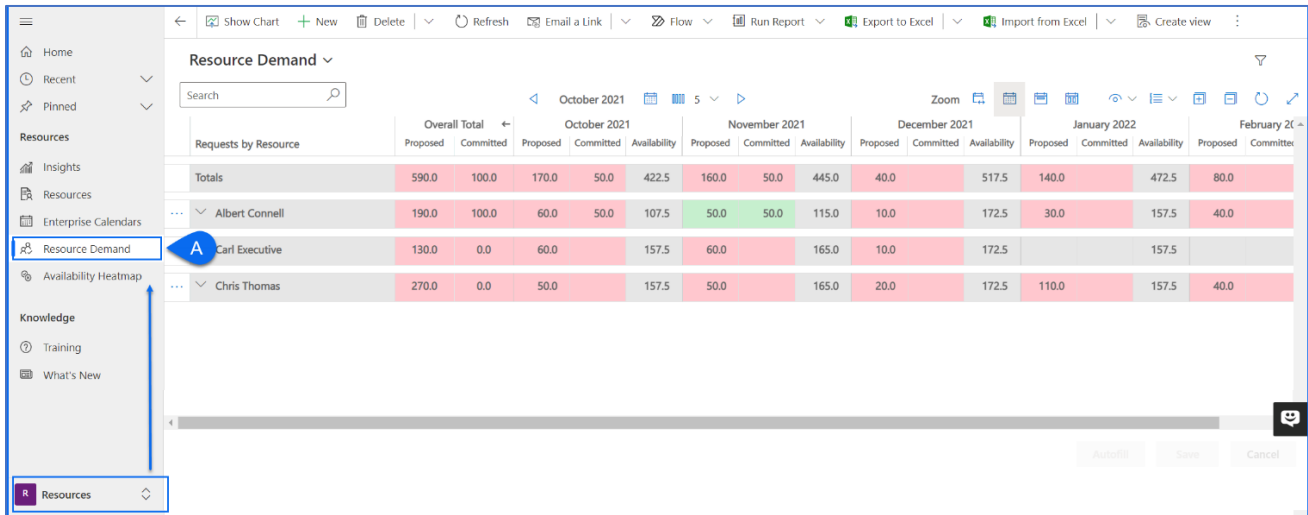
Approve a request for named resources

 Resource Manager

 Resources > Resources > Resource Demand

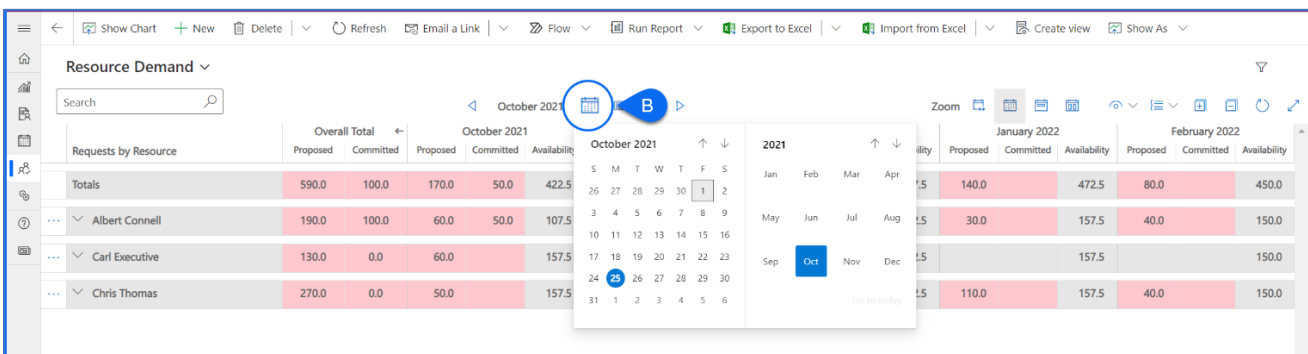
1. SET THE RESOURCE DEMAND HORIZON

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



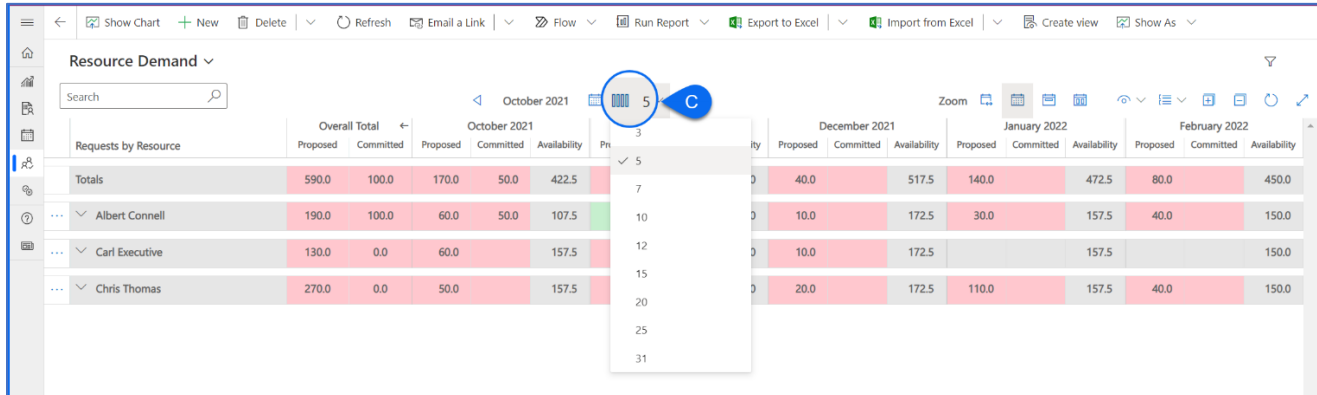
		Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022	
		Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed
Totals		590.0	100.0	170.0	50.0	422.5	160.0	50.0	445.0	40.0		517.5	140.0		472.5	80.0	
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	
Carl Executive		130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5		
Chris Thomas		270.0	0.0	50.0		157.5	50.0		165.0	20.0		172.5	110.0		157.5	40.0	

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



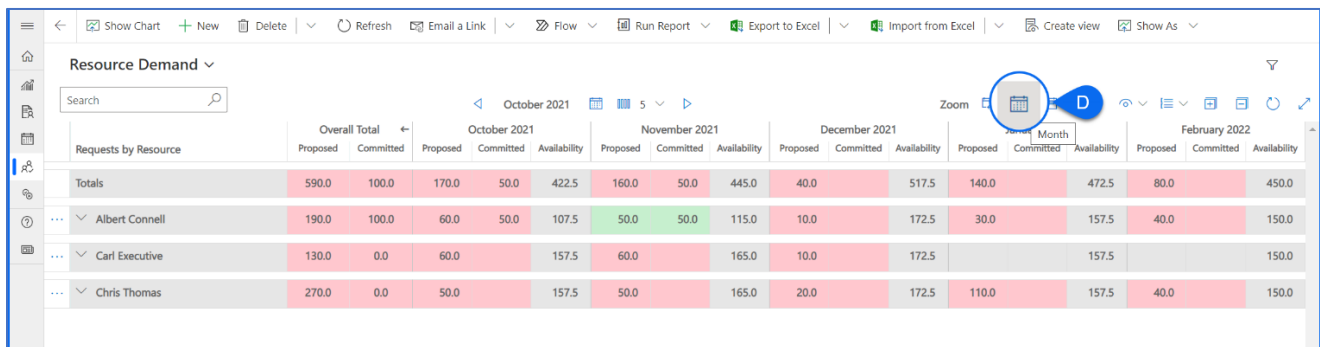
		Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022	
		Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed
Totals		590.0	100.0	170.0	50.0	422.5	160.0	50.0	445.0	40.0		517.5	140.0		472.5	80.0	
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	
Carl Executive		130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5		
Chris Thomas		270.0	0.0	50.0		157.5	50.0		165.0	20.0		172.5	110.0		157.5	40.0	

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

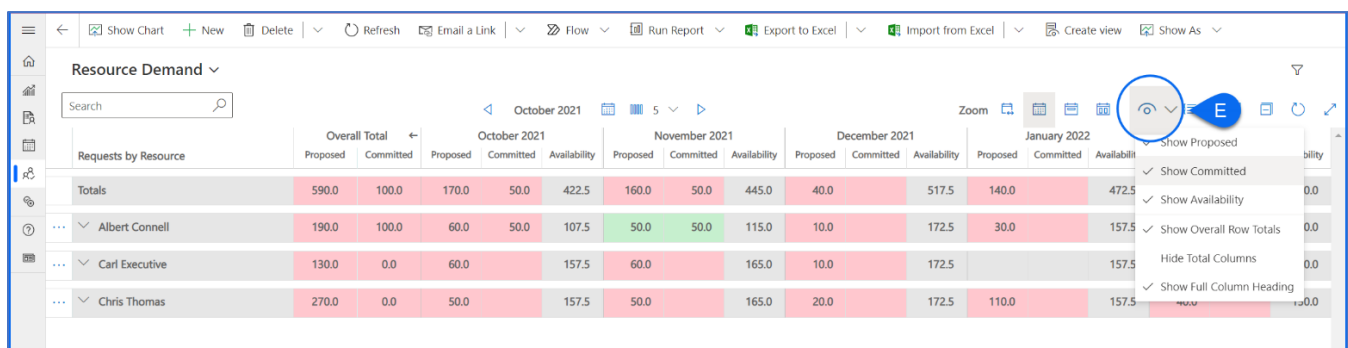


Important: If you opt to use the **Autofill** functionality, committed hours recorded in all visible periods displayed on the page are automatically populated by default. Ensure that you apply the appropriate fixed value for the number of **periods** that you want to remain visible on the page before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

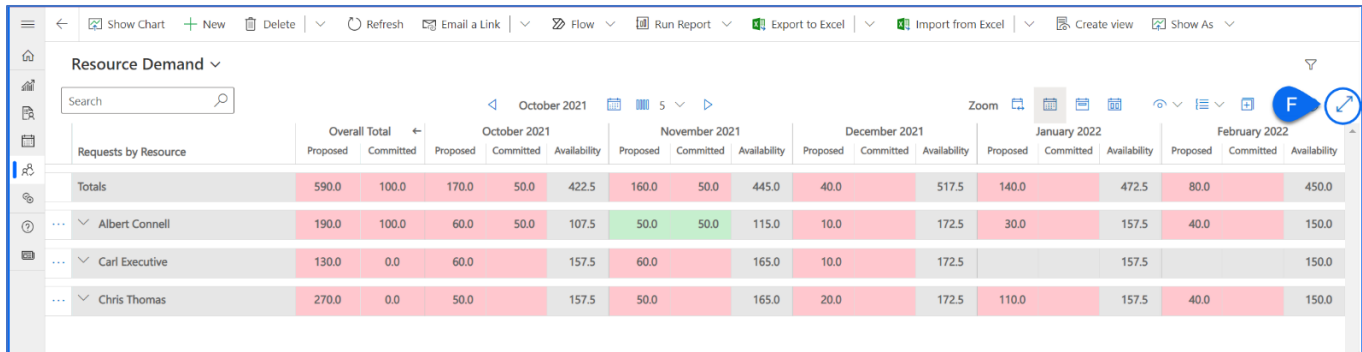
- d. Set the **timescale** of the period that you want to process resource requests from using the **Zoom** feature.



- 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.



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

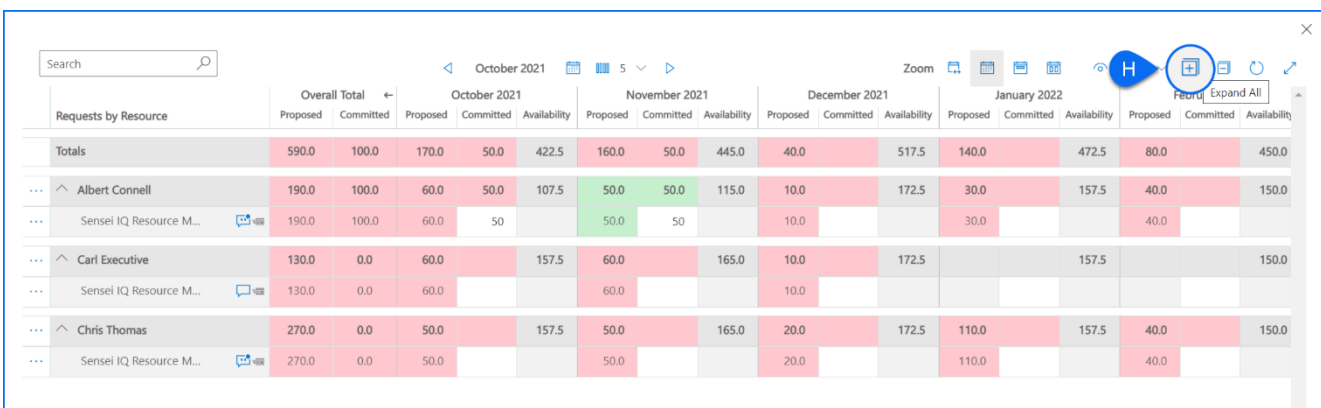
- g. Apply either the **Requests by Project** or **Requests by Resource** view using the **Grouping** menu depending on your preferred method of processing the requests.



		Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
Requests by Project		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

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



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

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

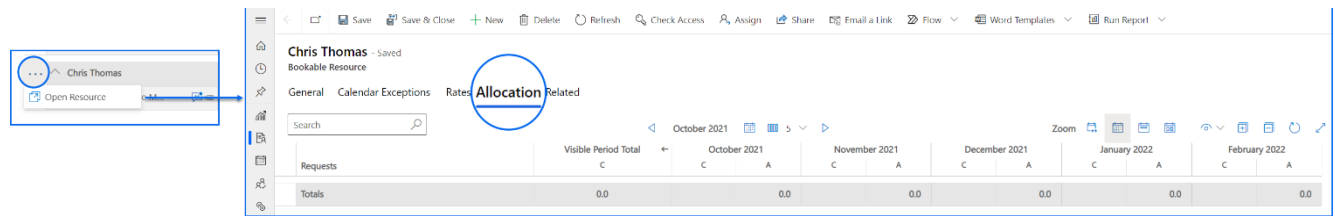
- Select a named resource row and review the **attached comments** on each request from the project manager individually.

Search

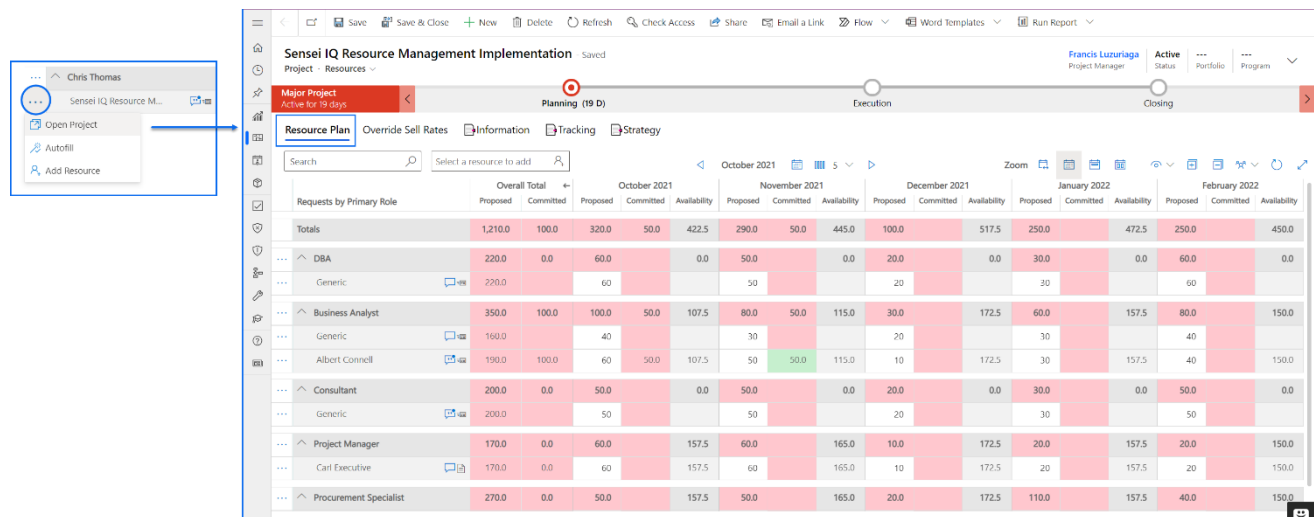
October 2021

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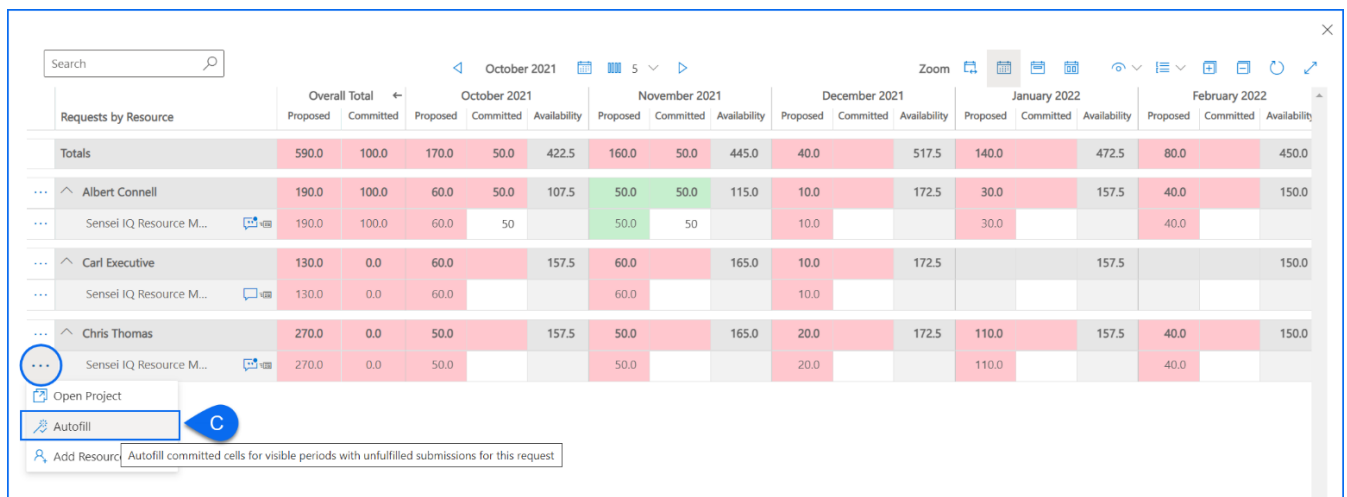
Zoom



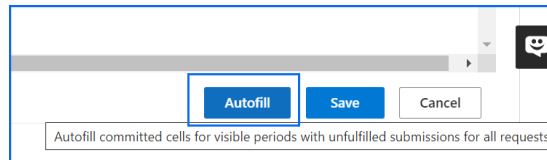
Tip: If you want to further understand the allocation of the named resources across a particular project, you can click the Row Menu button (...) in front of the project name and then the **Open Project** button to access the **Resource Plan** tab of the selected project in a separate window.



- 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.



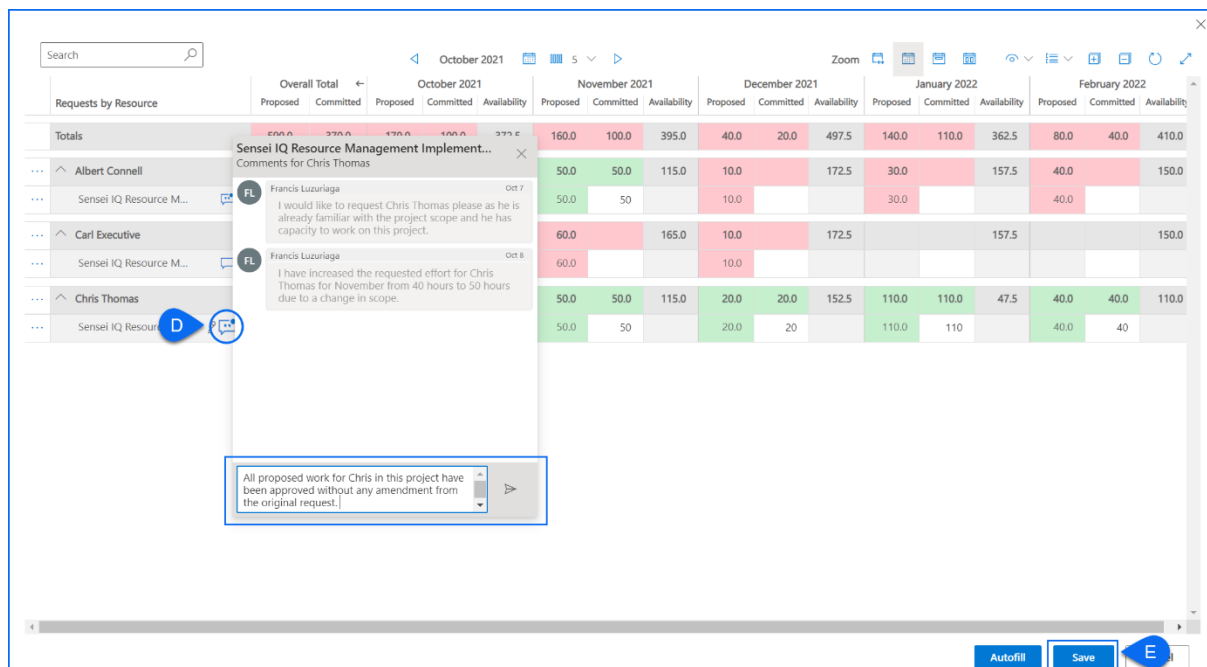
Tip: If you want to automatically fill the **Committed** cells with the proposed hours submitted (also referred to as **unfulfilled submissions**) against **all** pending requests from **all** project rows for the visible periods on the **Resource Demand** page **without** any amendment, you can click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

A screenshot of the Resource Demand table. The table has columns for months from October 2021 to February 2022. Each month has sub-columns for Proposed, Committed, and Availability. The row for 'Chris Thomas' shows proposed hours of 270.0 in October, 50.0 in November, 20.0 in December, 110.0 in January, and 40.0 in February. The committed hours are 270.0 in October, 50.0 in November, 20.0 in December, 110.0 in January, and 40.0 in February. The availability is 107.5 in October, 115.0 in November, 152.5 in December, 47.5 in January, and 110.0 in February. The row for 'Sensei IQ Resource M...' shows proposed hours of 270.0 in October, 50.0 in November, 20.0 in December, 110.0 in January, and 40.0 in February. The committed hours are 270.0 in October, 50.0 in November, 20.0 in December, 110.0 in January, and 40.0 in February. The availability is 50.0 in October, 50.0 in November, 20.0 in December, 110.0 in January, and 40.0 in February.

- 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.

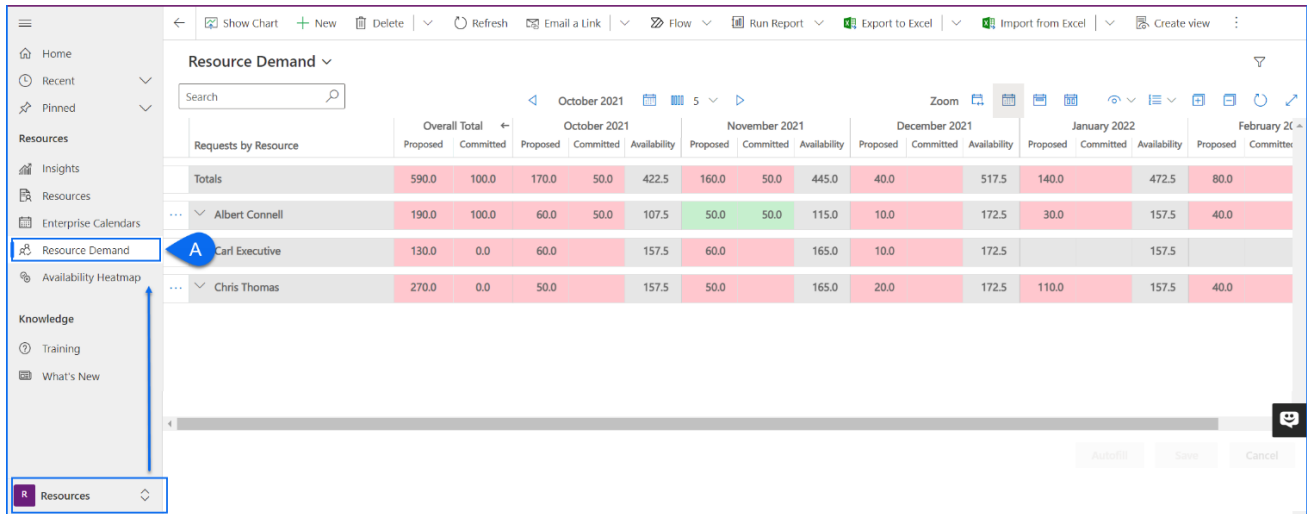
Modify and approve a request for named resources

 Resource Manager

 Resources > Resources > Resource Demand

1. SET THE RESOURCE DEMAND HORIZON

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



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
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			
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			
Carl Executive		130.0	0.0	60.0		157.5	60.0		165.0	10.0	172.5		157.5				
Chris Thomas		270.0	0.0	50.0		157.5	50.0		165.0	20.0	172.5	110.0	157.5	40.0			

- Follow the same steps described in the [Approve a request for named resources](#) section above.

2. MODIFY THEN FULFILL A REQUEST FOR NAMED RESOURCES

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

Search

Requests by Resource

Totals

Albert Connell

Sensei IQ Resource M...

Carl Executive

Chris Thomas

Sensei IQ Resource Management Implement...

Comments for Albert Connell

FL

Francis Luzuriaga

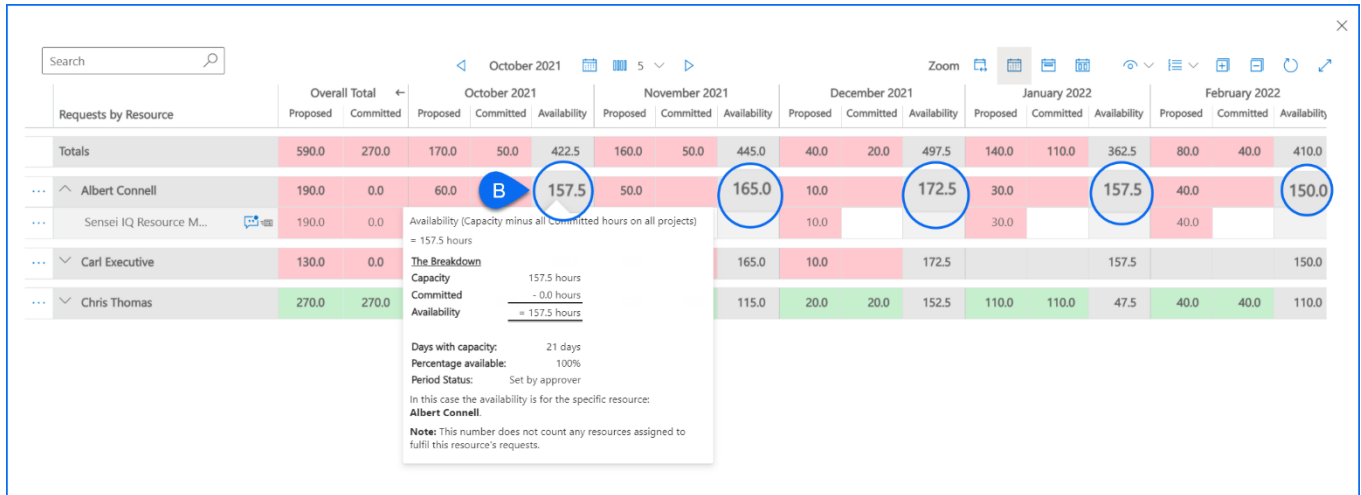
Oct 20

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

5

Zoom

- 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.



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	270.0	170.0	50.0	422.5	160.0	50.0	445.0	40.0	20.0	497.5	140.0	110.0	362.5	80.0	40.0	410.0
Albert Connell	190.0	0.0	60.0		157.5	50.0		165.0	10.0		172.5	30.0		157.5	40.0		150.0
Sensei IQ Resource M...	190.0	0.0							10.0			30.0			40.0		
Carl Executive	130.0	0.0						165.0	10.0		172.5			157.5			150.0
Chris Thomas	270.0	270.0						115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110.0

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

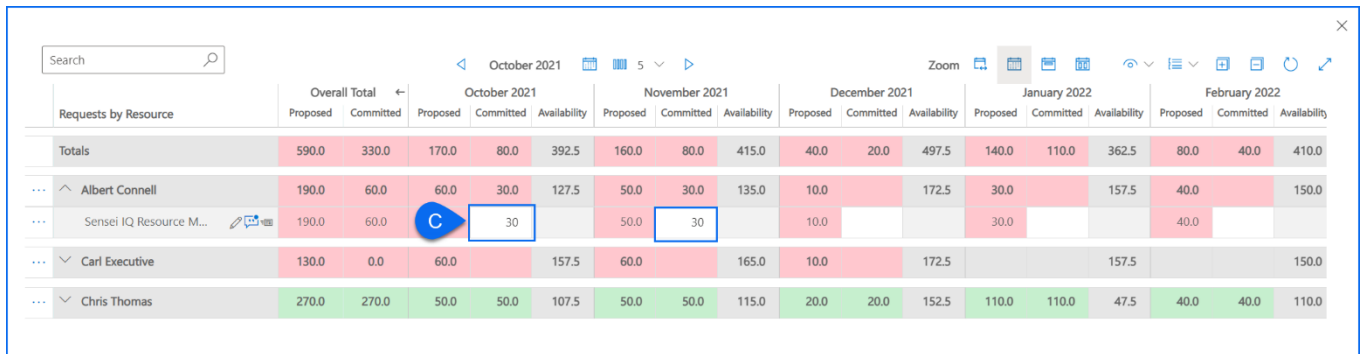
The Breakdown
Capacity 157.5 hours
Committed - 0.0 hours
Availability = 157.5 hours

Days with capacity: 21 days
Percentage available: 100%
Period Status: Set by approver

In this case the availability is for the specific resource:
Albert Connell

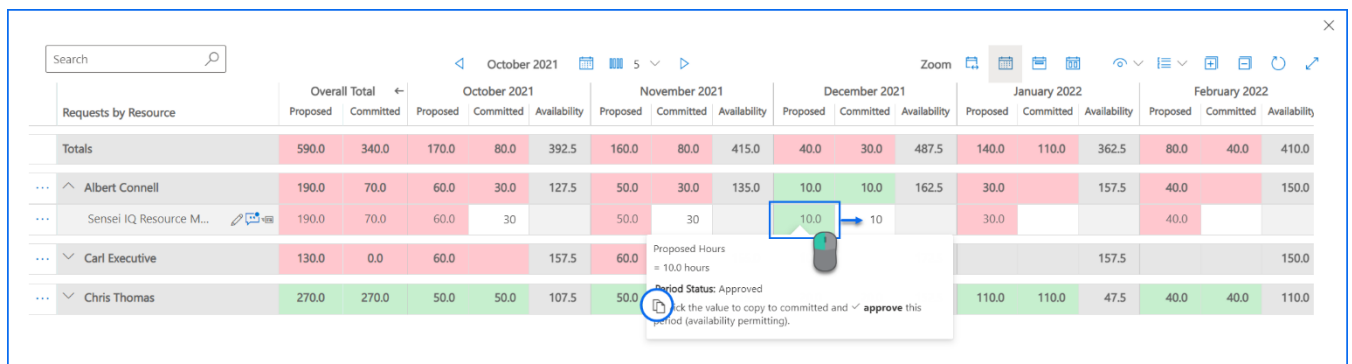
Note: This number does not count any resources assigned to fulfill this resource's requests.

- 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.



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	330.0	170.0	80.0	392.5	160.0	80.0	415.0	40.0	20.0	497.5	140.0	110.0	362.5	80.0	40.0	410.0
Albert Connell	190.0	60.0	60.0	30.0	127.5	50.0	30.0	135.0	10.0		172.5	30.0		157.5	40.0		150.0
Sensei IQ Resource M...	190.0	60.0		30		50.0	30		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
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

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.



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	340.0	170.0	80.0	392.5	160.0	80.0	415.0	40.0	30.0	487.5	140.0	110.0	362.5	80.0	40.0	410.0
Albert Connell	190.0	70.0	60.0	30.0	127.5	50.0	30.0	135.0	10.0	10.0	162.5	30.0		157.5	40.0		150.0
Sensei IQ Resource M...	190.0	70.0	60.0	30		50.0	30		10.0			30.0			40.0		
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	50.0	107.5	50.0		115.0				110.0	110.0	47.5	40.0	40.0	110.0

Proposed Hours = 10.0 hours

Period Status: Approved

Click the value to copy to committed and approve this period (availability permitting).

- 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.

The screenshot displays the 'Requests by Resource' table in the Altus software. The table has columns for months from October 2021 to February 2022, each with sub-columns for Proposed, Committed, and Availability. A blue circle 'D' highlights the 'Row Menu' button (...) for the 'Sensel IQ Resource M...' row. A blue circle 'E' highlights the 'Add Resource' button in the dropdown menu. Below the table, a search results panel is shown with a search bar containing 'Bob' and a list of suggested resources: 'Bob Banker' (Network Architect, 802.5 hrs) and 'Bob Melvin' (Business Analyst, 802.5 hrs).

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.

The screenshot displays the 'Requests by Resource' table in the Altus software after adding resources. The table shows the same data as the previous screenshot, but with additional resources added. A blue circle highlights the 'Add Resource' button in the dropdown menu for the 'Sensel IQ Resource M...' row. The table shows the following data for the 'Sensel IQ Resource M...' row: Proposed: 190.0, Committed: 120.0, Availability: 60.0.

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	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
Sensei IQ Resource M...	190.0	110.0	60.0	30		50.0	30		10.0	10		30.0	20		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

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

Sensei IQ Resource Management Implement...
Comments for Albert Connell

FL Francis Luzuriaga Oct 20
Approved 40 hours for October and November.

FL Francis Luzuriaga Oct 20
Requesting an increase in the committed work of Albert from 40 to 60 hours due to the increase in scope.

I have approved the proposed work with necessary amendments and backfilling the demand with additional resources.

	November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
Totals	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	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...	50.0	30		10.0	10		30.0	20		40.0	20	
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	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110.0

Autofill Save

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.

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		
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
Sensei IQ Resource M...	190.0											30.0	20		40.0	20	
Bill Collett														157.5		15	135.0
Bob Melvin														157.5		5	145.0
Carl Executive	130.0													157.5			150.0
Chris Thomas	270.0											110.0	110.0	47.5	40.0	40.0	110.0

The Breakdown
Capacity
Committed (elsewhere)
Committed (here)
Net proposed (here)
Proposed availability
Days with capacity:
Percentage available:
Period Status:

Set by approver

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	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 I...	590.0	450.0	170.0	110.0	677.5	160.0	100.0	725.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0
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

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	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 I...	590.0	450.0	170.0	110.0	677.5	160.0	100.0	725.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0
Chris Thomas	270.0	270.0	50.0	50	107.5	50.0	50	115.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0

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
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	
Totals	590.0	430.0	170.0	110.0	677.5	160.0	80.0	745.0	4
^ Sensei IQ Resource Management L...	590.0	430.0	170.0	110.0	677.5	160.0	80.0	745.0	4
... Chris Thomas	270.0	250.0	50.0	50	107.5	50.0	30	135.0	2

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**).

Requests by Project

Totals	
^ Sensei IQ Resource Management	
... Chris Thomas	

Sensei IQ Resource Management Implement...

Comments for Chris Thomas

FL Francis Luzuriaga Oct 7

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

FL 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.

FL Francis Luzuriaga Oct 26

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

I have reduced the committed work of Chris in November from 50 to 30 hours as he will be away on leave for 3 days as per conversation.

5

November 2021			December 2021			January 2022			February 2022		
Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
160.0	80.0	745.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0
160.0	80.0	745.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0
50.0	30	135.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0

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

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

The screenshot shows the Altus Resource Management interface. The main table displays resource allocations across months from October 2021 to February 2022. The 'Change Resource' option is highlighted in the row menu for 'Bill Collett'. A search for 'Bill' has been performed, showing suggested resources like 'Bill Speker' and 'Bill Tibbetts'.

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	430.0	170.0	110.0	677.5	160.0	80.0	745.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0	
Sensei IQ Resource Management L...	590.0	430.0	170.0	110.0	677.5	160.0	80.0	745.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0	
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	
Open Resource	25.0			10	147.5		10	155.0			172.5			157.5		5	145.0	
Change Resource	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150.0	
Remove Resource	270.0	250.0	50.0	50	107.5	50.0	30	135.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0	

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

The screenshot shows the Altus Resource Management interface. The main table displays resource allocations across months from October 2021 to February 2022. The 'Change Resource' option is highlighted in the row menu for 'Bill Collett'. A search for 'Bill' has been performed, showing suggested resources like 'Bill Speker' and 'Bill Tibbetts'. A comment box is open for 'Bill Collett' with the text: 'Bill Collett is no longer required in your project so I have replaced him with an equally-skilled resource, Bill Tibbetts from the same team.'

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	430.0	170.0	110.0	677.5	160.0	80.0	745.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0	
Sensei IQ Resource Management L...	590.0	430.0	170.0	110.0	677.5	160.0	80.0	745.0	40.0	30.0	832.5	140.0	130.0	657.5	80.0	80.0	670.0	
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	
Open Resource	25.0			10	147.5		10	155.0			172.5			157.5		5	145.0	
Change Resource	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150.0	
Remove Resource	270.0	250.0	50.0	50	107.5	50.0	30	135.0	20.0	20	152.5	110.0	110	47.5	40.0	40	110.0	

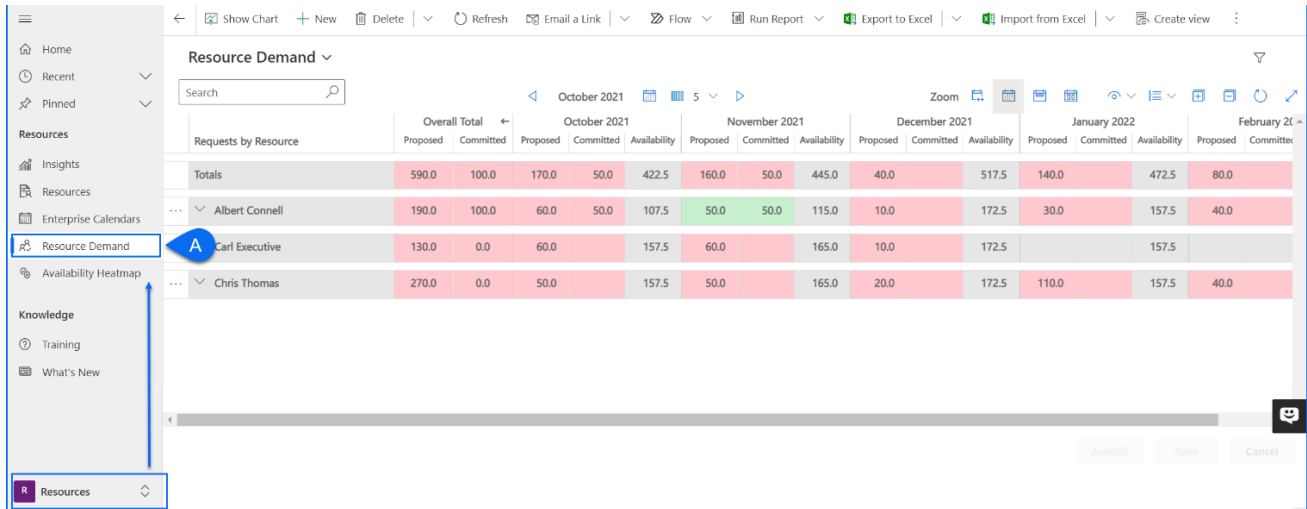
- i. Finally, if you need to remove an allocated resource to the project, click the **Row Menu** button (...) in front of the named resource row that you want to remove from the project (e.g., if the resource has already left the organisation) to view more options.
- j. Select **Remove Resource** from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

Fulfill a submitted request for generic 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.

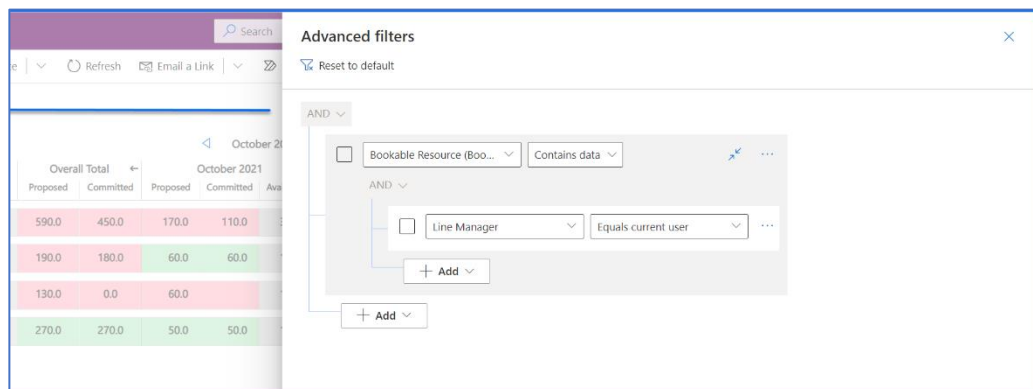


Requests by Resource	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022	
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed
Totals	590.0	100.0	170.0	50.0	422.5	160.0	50.0	445.0	40.0		517.5	140.0		472.5	80.0	
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	
Carl Executive	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5		
Chris Thomas	270.0	0.0	50.0		157.5	50.0		165.0	20.0		172.5	110.0		157.5	40.0	

- 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 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 customised in your organisation's 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**).



Overall Total	Proposed	Committed	Proposed	Committed	Availability
590.0	450.0	170.0	110.0		
190.0	180.0	60.0	60.0		
130.0	0.0	60.0			
270.0	270.0	50.0	50.0		

Advanced filters

Reset to default

AND

- ☐ Bookable Resource (Boo...) Contains data
- AND
- ☐ Line Manager Equals current user

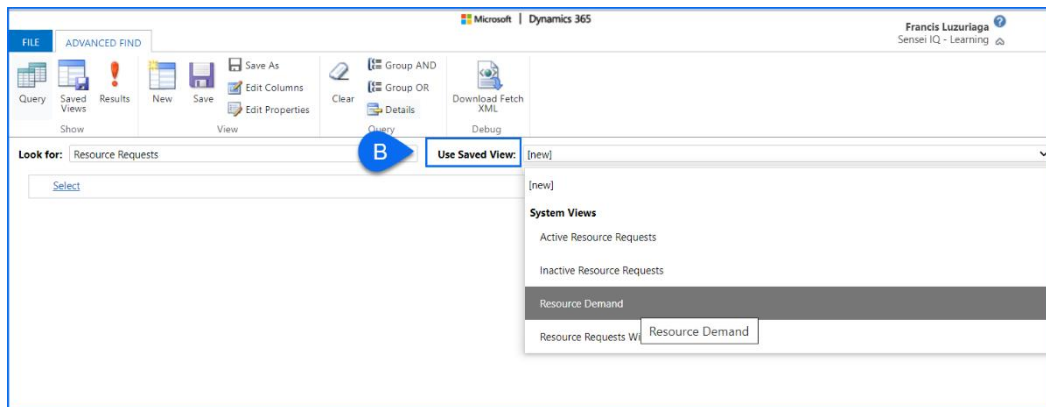
+ Add

+ Add

- 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

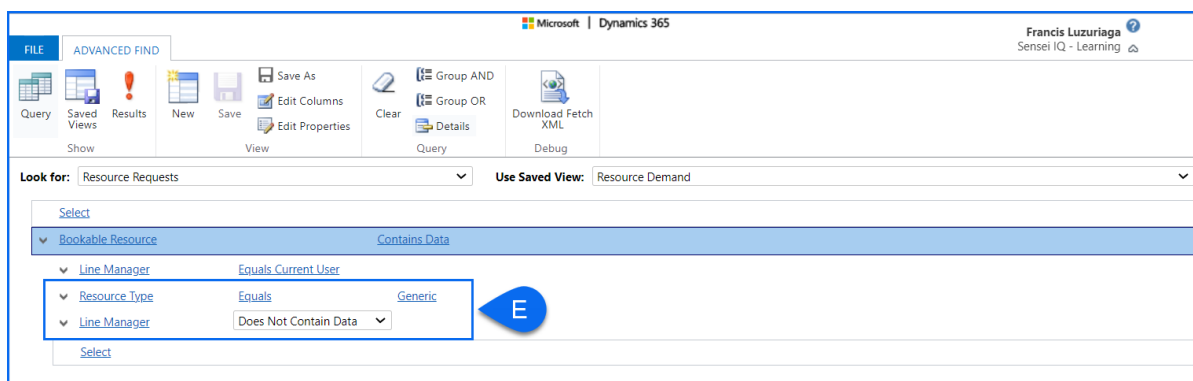
b. In the dialog box, select **Resource Demand** from the **Use Saved View** drop-down list.



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

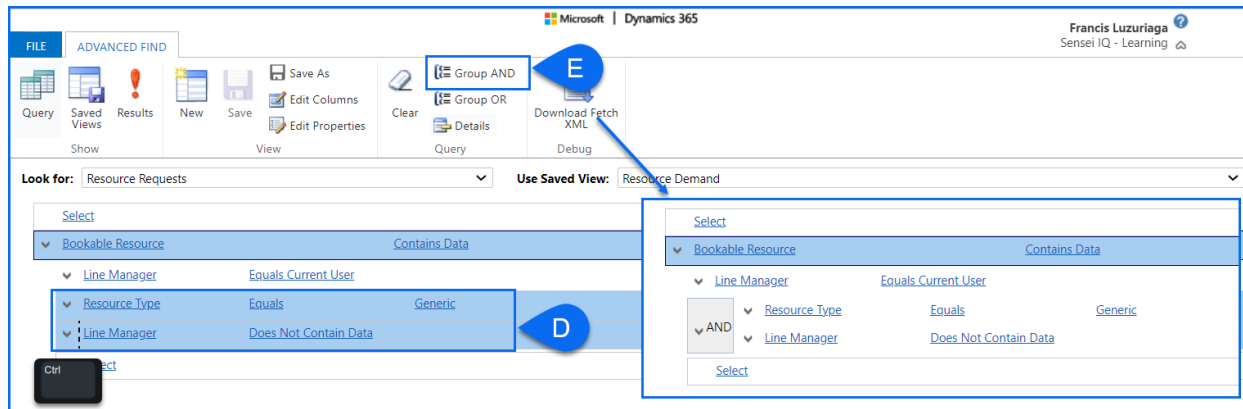
- **Resource Type – Equals - Generic**
- **Line Manager – Does Not Contain Data**

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

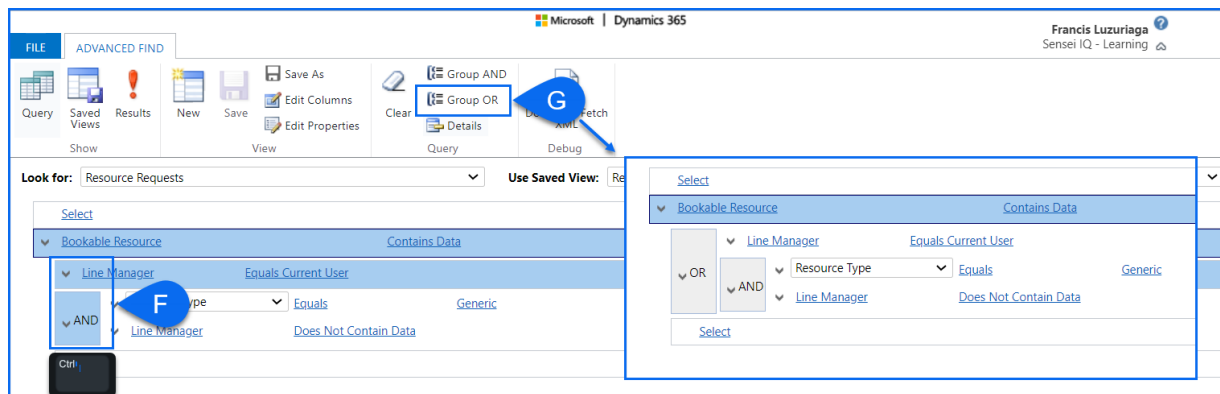


d. Press and hold the control key (**Ctrl**) on your keyboard and select the newly added filters in the view.

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

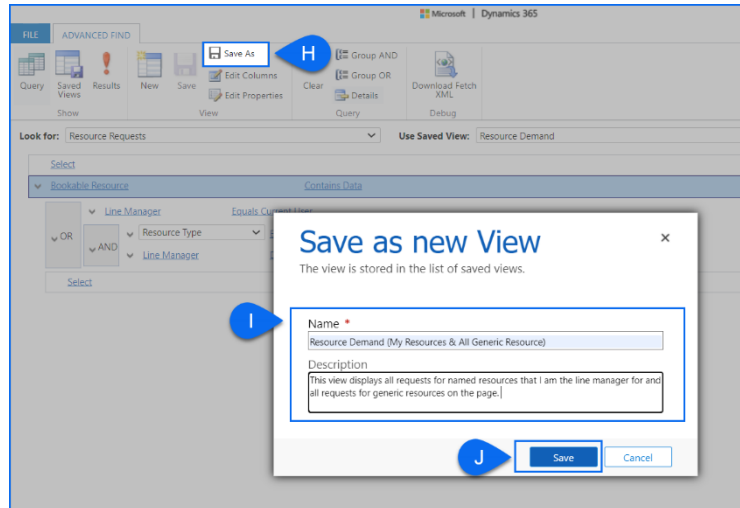


- f. Press and hold the control key (**Ctrl**) on your keyboard again and select the default filter and the **AND** query line in the view this time.
- g. Click the **Group OR** button from the **Advanced Find** ribbon then release the control key (**Ctrl**) on your keyboard.

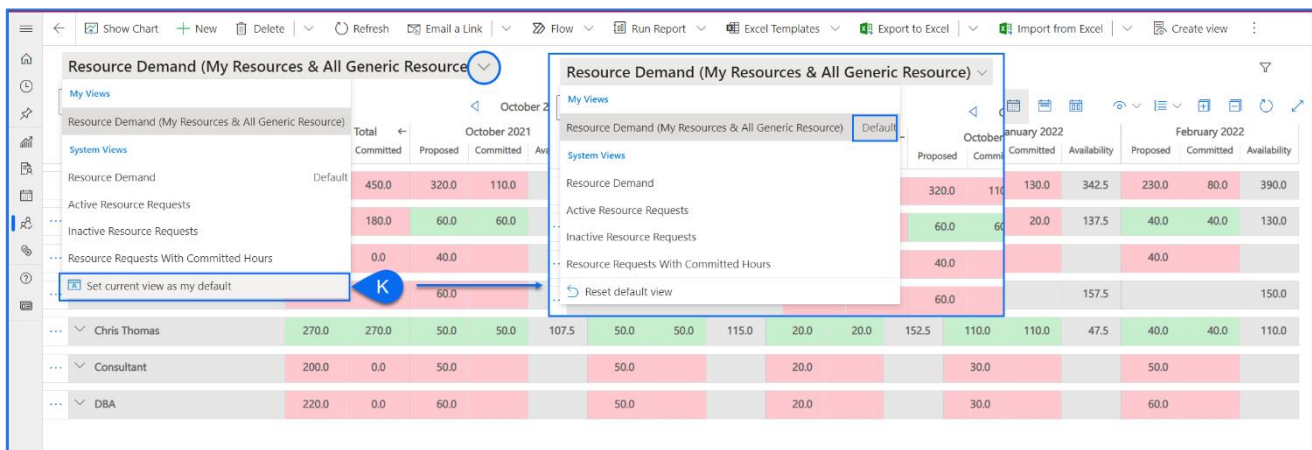


- h. Once you have set the custom filters and their grouping, click the **Save As** button from the **Advanced Find** ribbon.

- 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.

Resource Demand (My Resources & All Generic Resource)

Search

October 2021 5

Zoom

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	1,170.0	450.0	320.0	110.0	392.5	290.0	100.0	415.0	100.0	30.0	487.5	230.0	130.0	342.5	230.0	80.0	390.0
Albert Connell	190.0	180.0	60.0	60.0	127.5	50.0	50.0	135.0	10.0	10.0	162.5	30.0	20.0	137.5	40.0	40.0	130.0
Sensei IQ Resource M...	190.0	110.0	60.0	30		50.0	30		10.0	10		30.0	20		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
Business Analyst	160.0	0.0	40.0			30.0			20.0			30.0			40.0		
Sensei IQ Resource M...	160.0		40.0			30.0			20.0			30.0			40.0		
Carl Executive	130.0	0.0	60.0		157.5	60.0		165.0	10.0		172.5			157.5			150.0
Sensei IQ Resource M...	130.0	0.0	60.0			60.0			10.0								
Chris Thomas	270.0	270.0	50.0	50.0	107.5	50.0	50.0	115.0	20.0	20.0	152.5	110.0	110.0	47.5	40.0	40.0	110.0
Sensei IQ Resource M...	270.0	270.0	50.0	50		50.0	50		20.0	20		110.0	110		40.0	40	
Consultant	200.0	0.0	50.0			50.0			20.0			30.0			50.0		
Sensei IQ Resource M...	200.0		50.0			50.0			20.0			30.0			50.0		
DBA	220.0	0.0	60.0			50.0			20.0			30.0			60.0		

Autofill Save Cancel

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.

Resource Demand (My Resources & All Generic Resource)

Search

October 2021 5

Zoom

Project

Resource

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	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

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

The screenshot shows the Altus Resource Management interface. On the left, a 'Requests by Project' list shows 'Sensei IQ Resource Management Implement...' selected. A comment box for Francis Luzuriaga is open, displaying two comments: 'I would like to request Brice Center if he is available for part or whole of the requested duration given his expertise and experience.' and 'I have increased the requested effort for a Consultant role for November from 40 hours to 50 hours due to a change in scope.' The main table displays resource allocation for various roles (Business Analyst, Consultant, DBA, Albert Connell, Bill Collett, Bob Melvin, Carl Executive, Chris Thomas) across months from October 2021 to February 2022. The table columns are 'Proposed', 'Committed', and 'Availability'.

	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
Totals	1,170.0	450.0	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 Implement...	1,170.0	450.0	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	120.0	30.0	0.0	270.0	20.0	0.0	250.0	30.0	0.0	270.0	40.0	0.0	230.0
Consultant	200.0	220.0	0.0	50.0	50.0	0.0	20.0	20.0	0.0	30.0	30.0	0.0	50.0	60.0	0.0
DBA	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Albert Connell	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bill Collett	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bob Melvin	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Carl Executive	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chris Thomas	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

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

The screenshot shows the Altus Resource Management interface with the 'Add Resource' button highlighted. A search modal is open, displaying a list of suggested resources. The modal includes a search bar and a list of resources with their roles and total availability. The resources listed are: Brice Center (Consultant, 802.5 hrs), Eddie Mason (Consultant, 802.5 hrs), Emma Admin (Consultant, 802.5 hrs), Francis Luzuriaga (Consultant, 802.5 hrs), Jason Huebner (Consultant, 802.5 hrs), Nancy Portolio (Consultant, 802.5 hrs), and Walt Nickel (Consultant, 802.5 hrs).

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.

Search

October 2021 November 2021 December 2021 January 2022 February 2022

Zoom

Requests by Project

Totals

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.

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

Proposed Committed Availability

290.0 290.0 50.0 30.0 50.0

290.0 290.0 50.0 30.0 50.0

130.0 0.0 60.0 157.5 60.0

270.0 270.0 50.0 50 107.5 50.0

290.0 290.0 50.0 30.0 50.0

130.0 140.0 130.0 135.0 145.0 150.0 110.0

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

Search

October 2021 November 2021 December 2021 January 2022 February 2022

Zoom

Requests by Project

Overall Total

Proposed Committed Availability

Totals

Sensei IQ Resource Management Implement...

DBA

Business Analyst

Consultant

Brice Center

Jason Huebner

Walt Nickel

Albert Connell

Bill Collett

Bob Melvin

Carl Executive

Chris Thomas

Period Status: Set by approver

Capacity 172.5 hours

Committed (elsewhere) - 0.0 hours

Committed (here) - 10.0 hours

Availability = 162.5 hours

Days with capacity: 23 days

Percentage available: 94%

Period Status: Set by approver

Autofill Save G

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 organisation's solution, both the line manager and project manager are notified when resource requests are created, fulfilled and/or modified later.