Overview

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

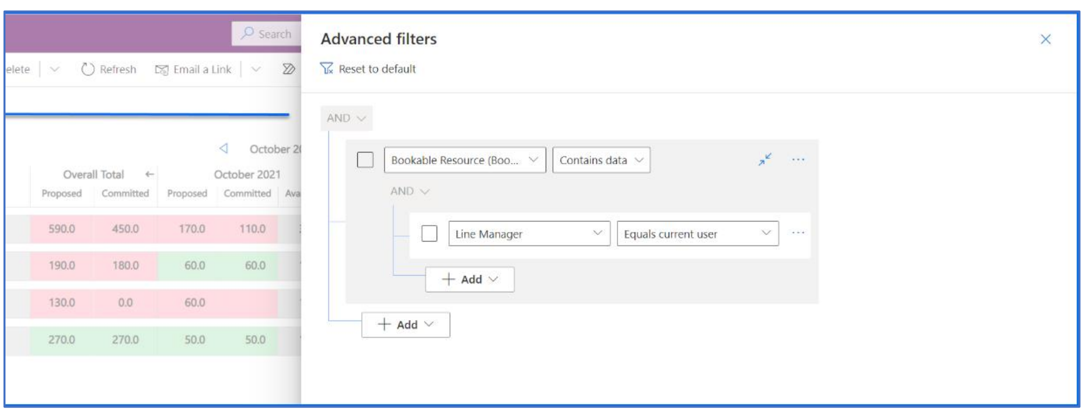
Work resources have defined availability and may have their time scheduled by a line manager in your organisation When a project manager submits a request for resources to support an approved project, the request is routed to the appropriate line managers for review and approval. If Resource Approval 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 allows users to manage the demand for resources that they are the line manager for. The filter can be modified or removed temporarily or permanently if your organisation requires you to view all resources.



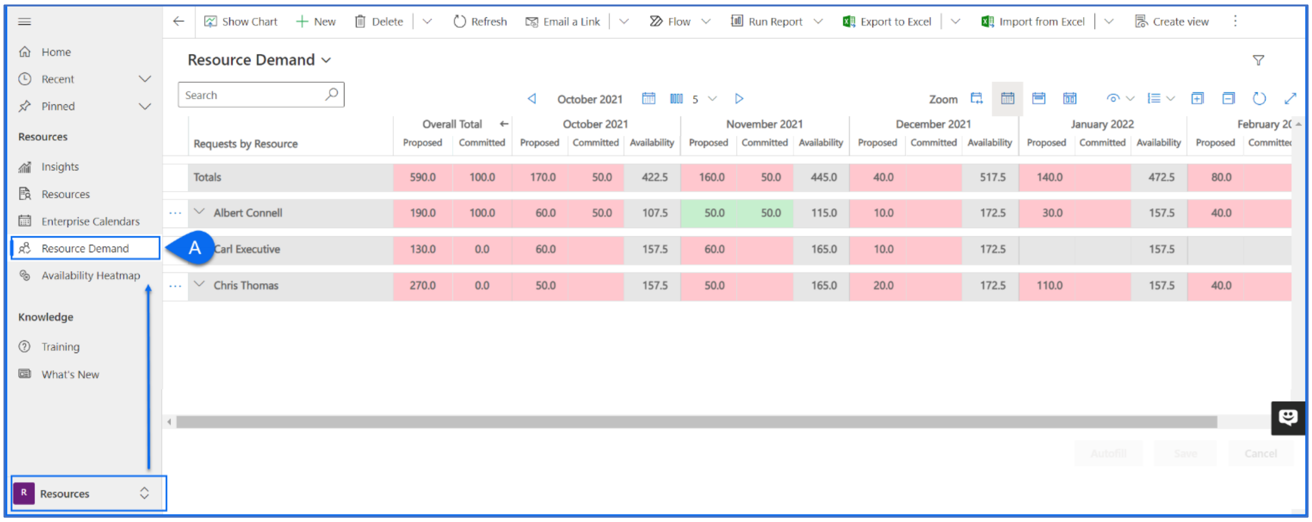
Approve a request for named resources

Resource Manager

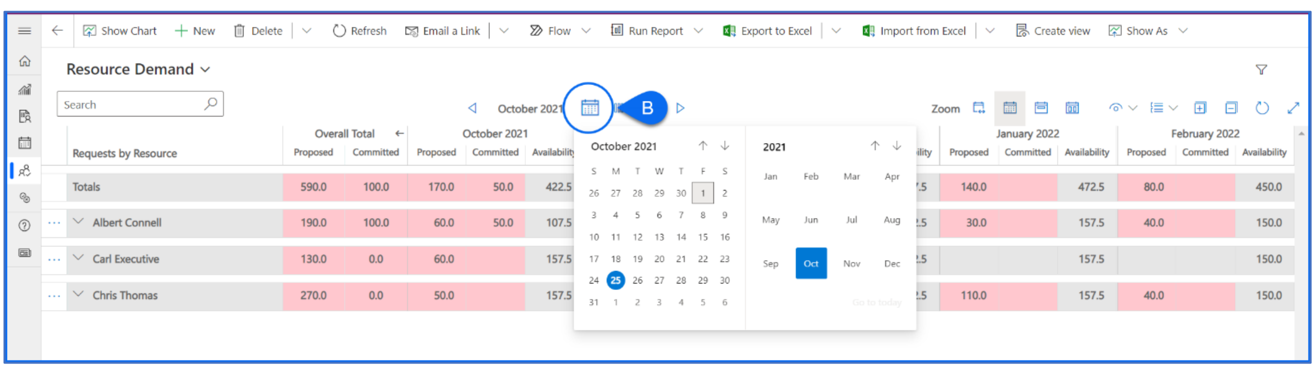
Resources > Resources > Resource Demand

1. SET THE RESOURCE DEMAND HORIZON

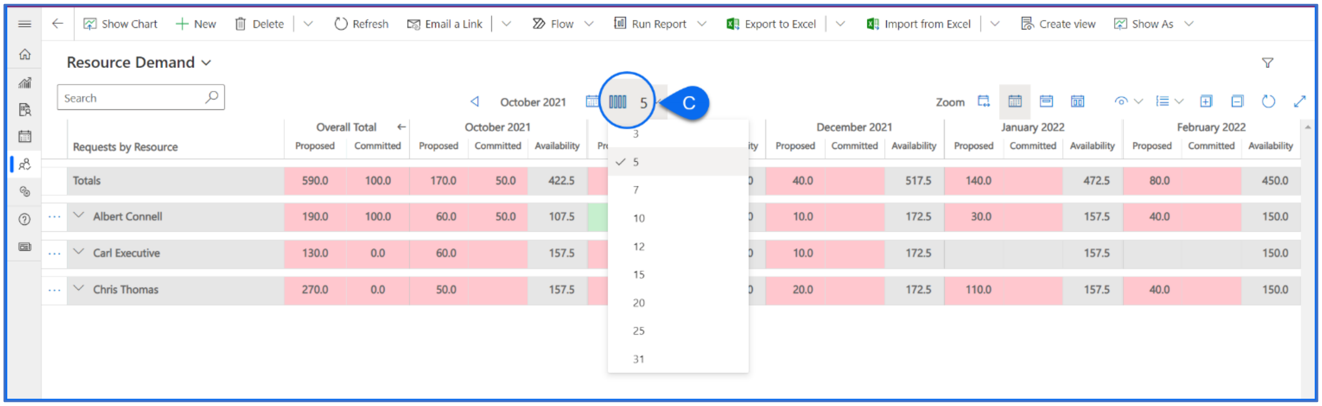
a. Ensure that you are in the **Resources** area and click **Resource Demand** in the **Resources** section.



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

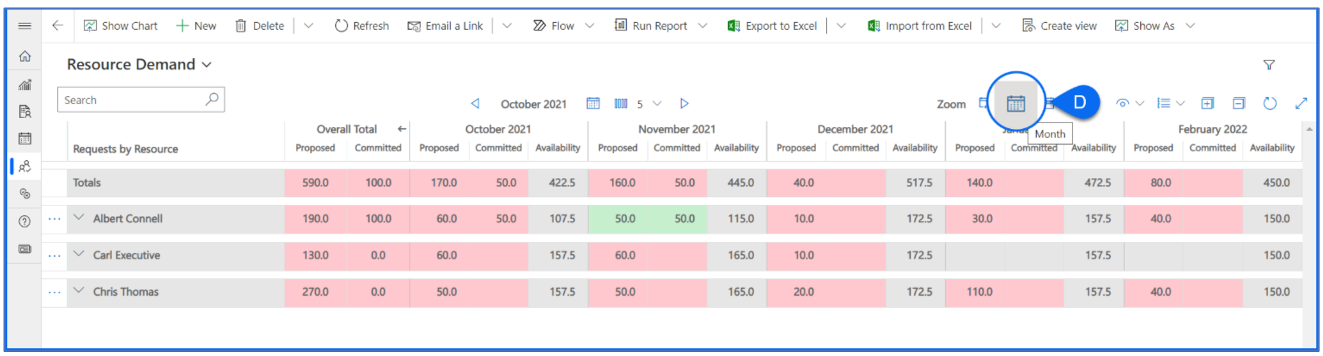


c. Set the number of **periods** you want to be visible on the page.

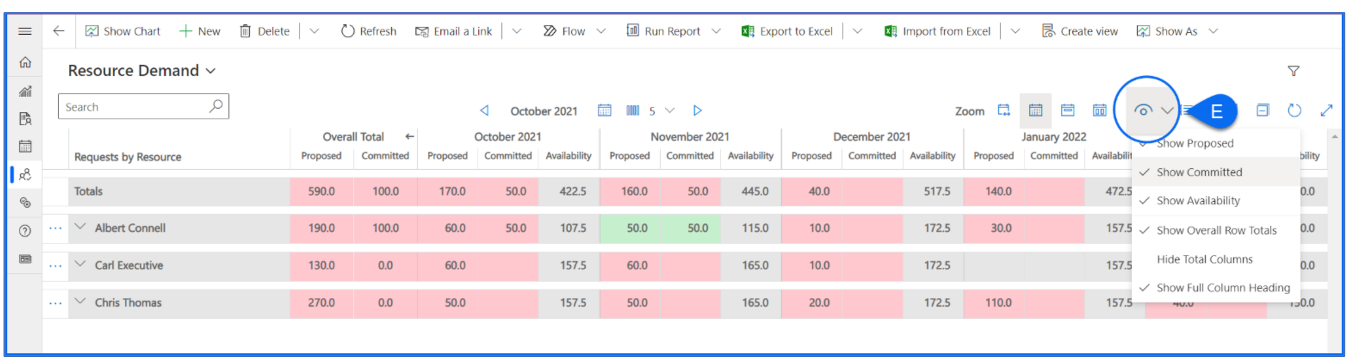


Important: If you opt to use the **Autofill** functionality, committed hours recorded in all visible periods displayed on the page are automatically populated by default. Ensure that you apply the appropriate fixed value for the number of **periods** that you want to remain visible on the page before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

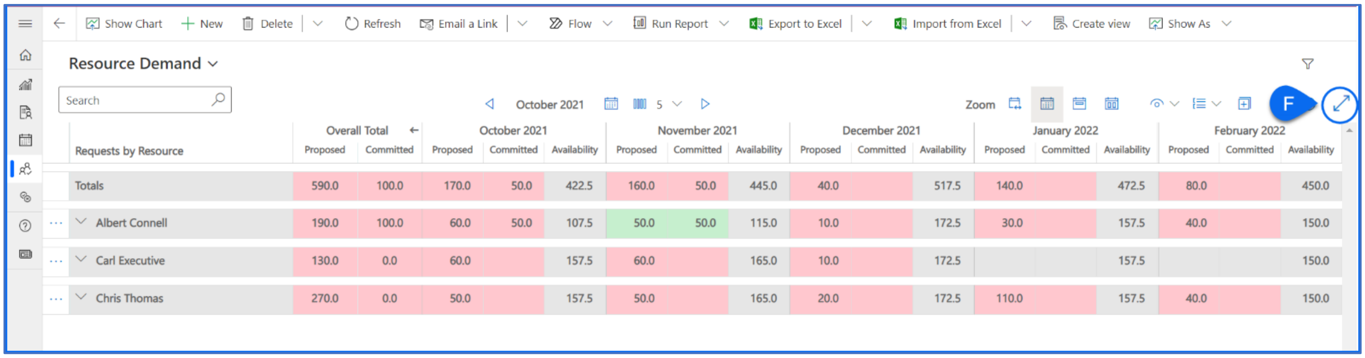
d. Set the **timescale** of the period that you want to process resource requests from using the **Zoom** feature.



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

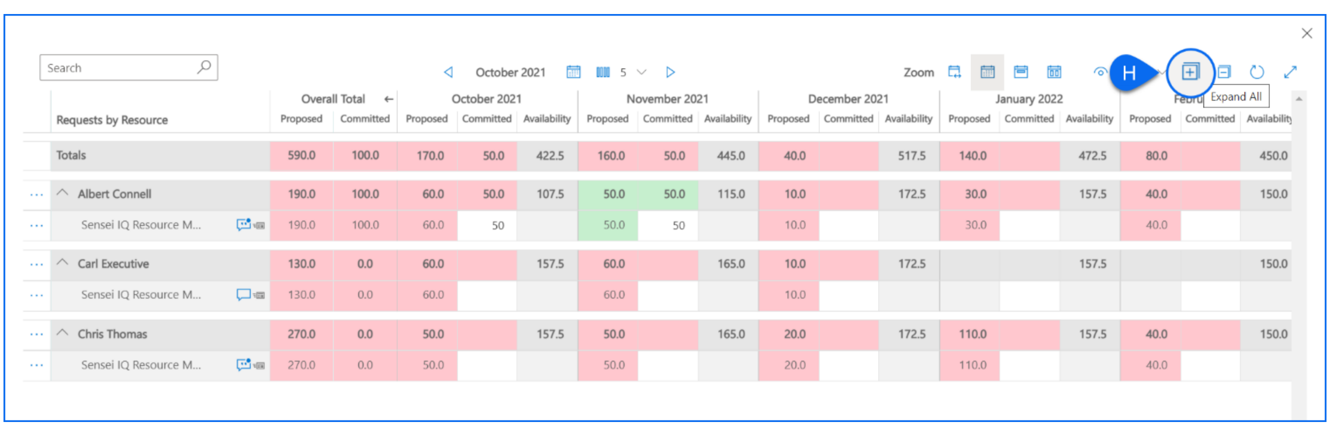


f. Enable the **Toggle Full Screen Mode** option to switch the **Resource Demand** screen to focus mode.



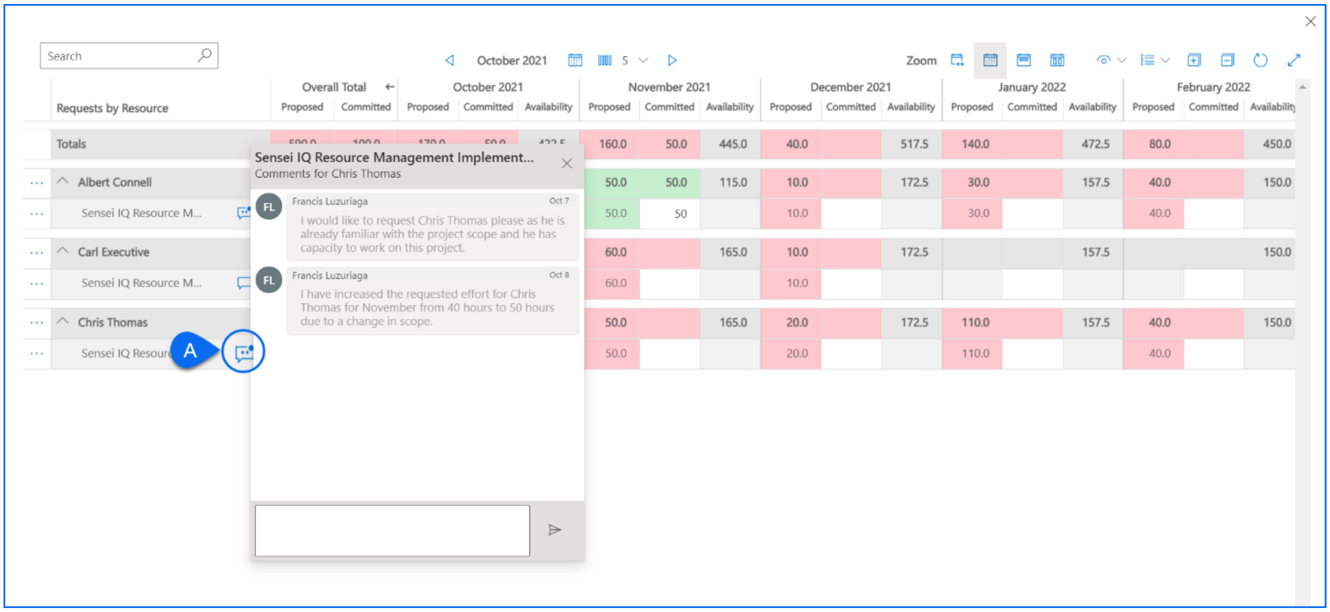
g. Apply either the **Requests by Project** or **Requests by Resource** view using the **Grouping** menu depending on your preferred method of processing the requests.

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

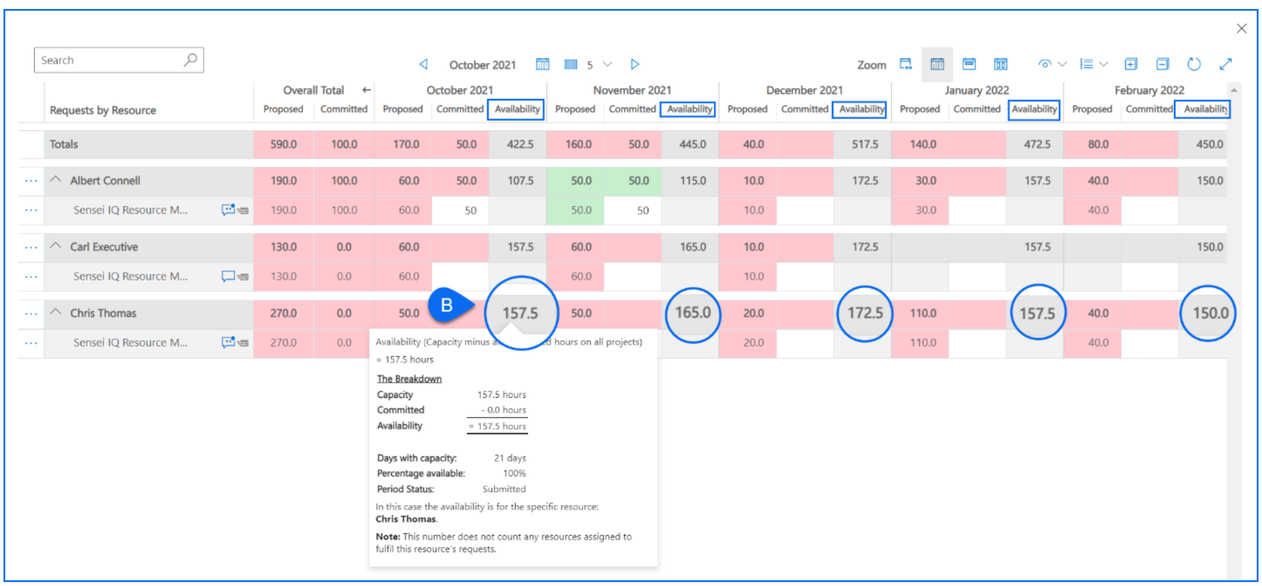


2. REVIEW AND APPROVE A REQUEST FOR NAMED RESOURCES USING AUTOFILL

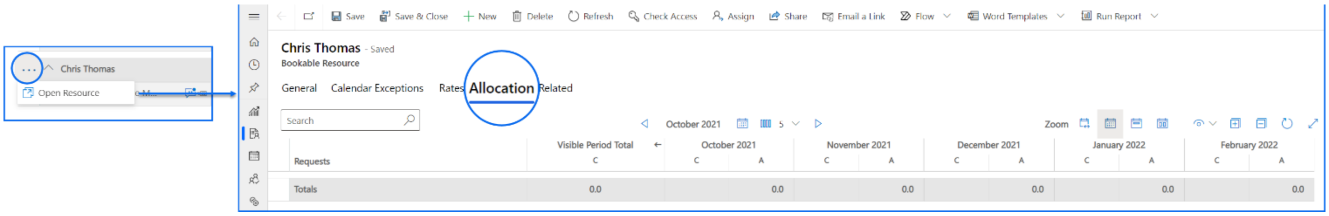
a. Select a named resource row and review the **attached comments** on each request from the project manager individually.



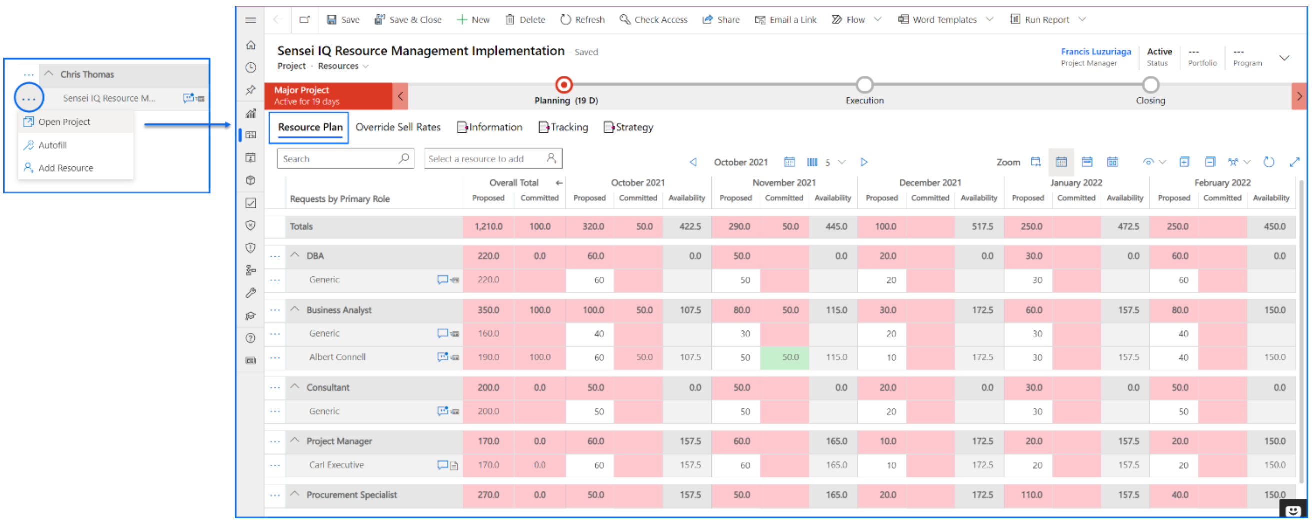
b. Hide the comments and evaluate the remaining availability of the named resource individually in the **Availability** column or the **tooltip text** when you hover the mouse over each visible period.



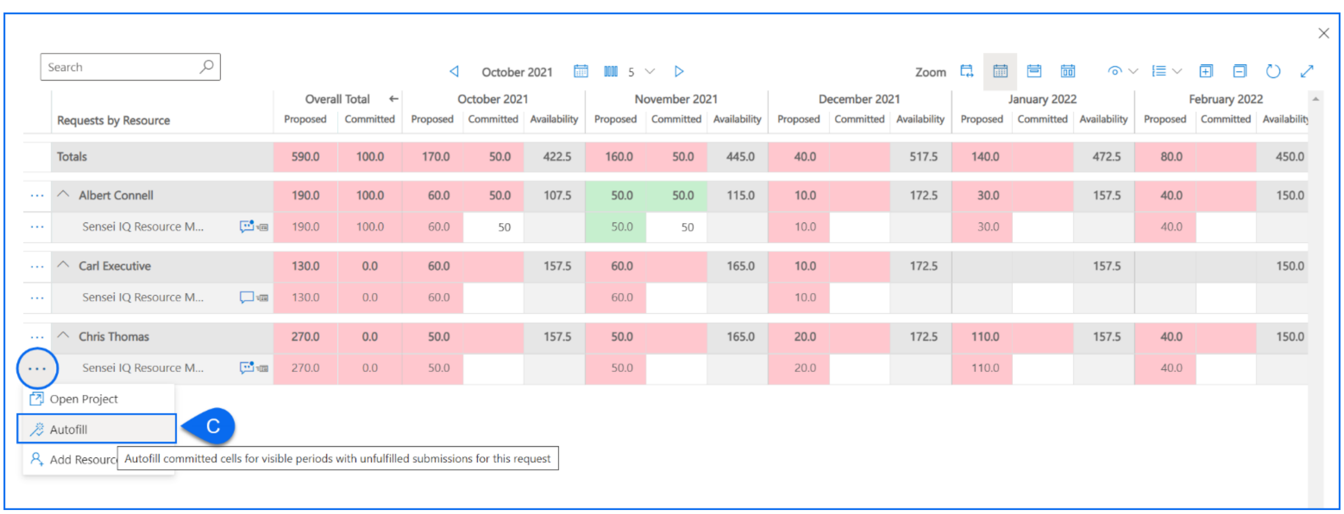
Tip: If you want to further understand the allocation of the selected named resource across other projects, you can click the **Primary Role Menu** button **(...)** in front of the primary resource role name and then the **Open Resource** button to access the **Allocation** tab of the named resource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



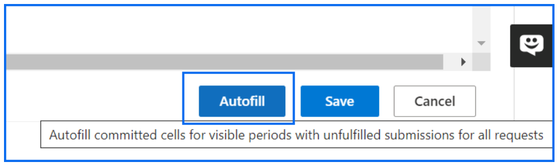
Tip: If you want to further understand the allocation of the named resources across a particular project, you can click the Row Menu button (...) in front of the project name and then the **Open Project** button to access the **Resource Plan** tab of the selected project in a separate window.



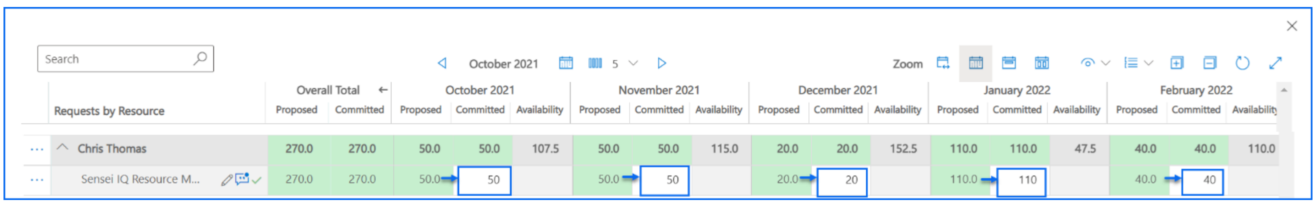
c. Once you have decided to fulfill the demand based on the proposed work **without** any amendment, click the **Row Menu** button **(...)** in front of the project name and then the **Autofill** button to automatically fill the **Committed** cells with the proposed hours submitted (also referred to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



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

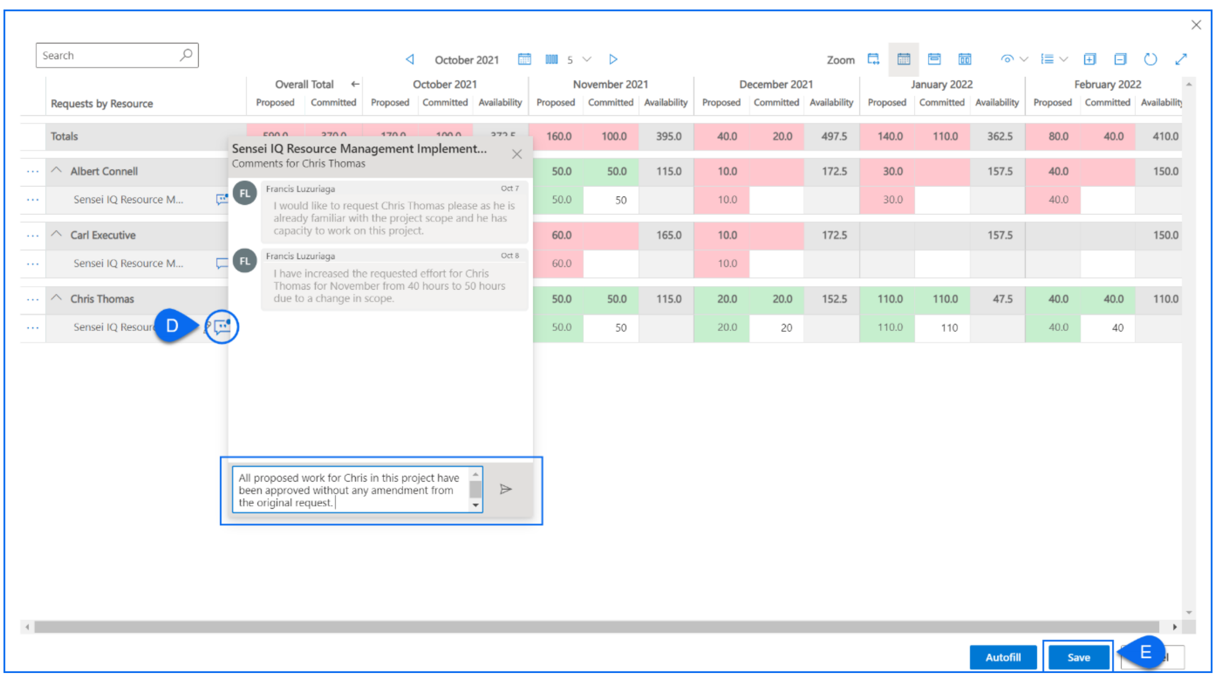


Important: At this point of the resource request approval process, the approved resource allocation (also referred to as **committed work**) is displayed in the **Committed** column as *read-write* and the cells the **Proposed** hours are contained in are highlighted in green denoting the committed hours fulfilled by the line manager is equal to the proposed hours for the period requested. Otherwise, the cells they are contained in would be highlighted red denoting that the committed hours fulfilled by the line manager is either less or more than the proposed hours for the period requested.



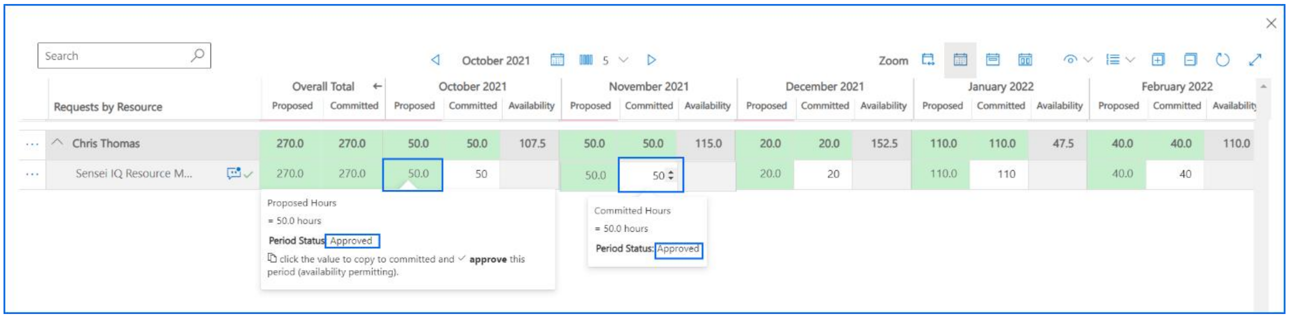
d. Attach **comments** to each fulfilled resource request to provide contextual information to the respective project managers (**recommended**).

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

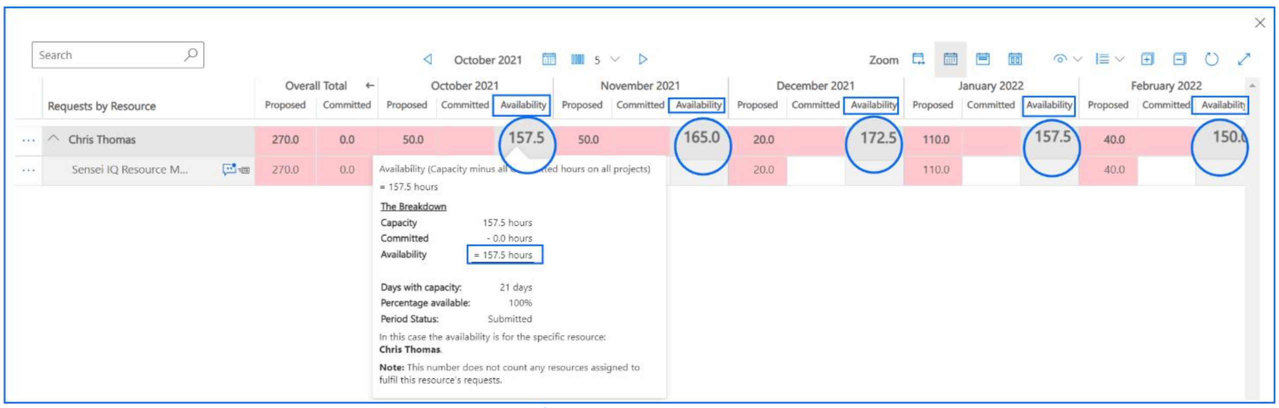


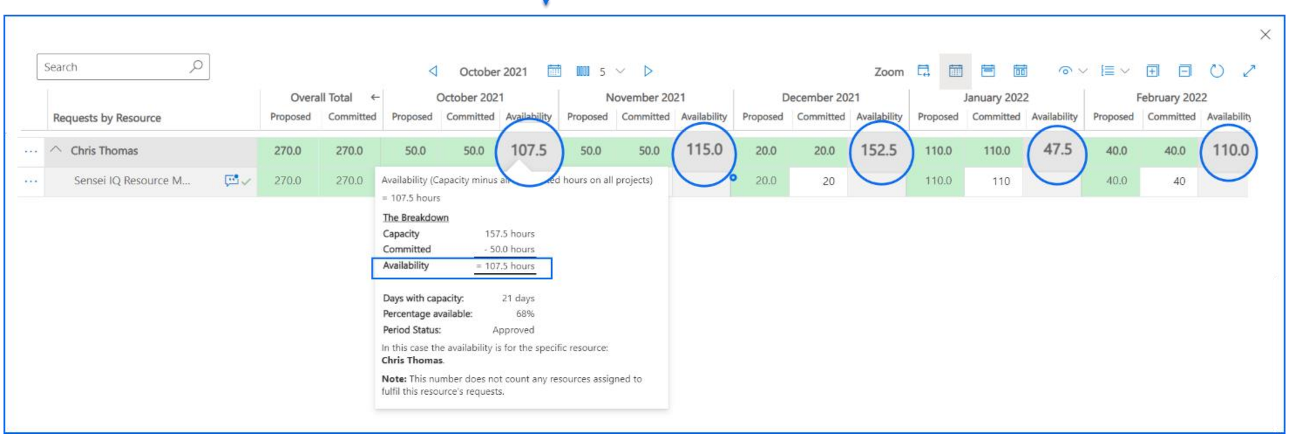
Tip: Clicking the **Cancel** button will discard the changes applied to the page.

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.



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.



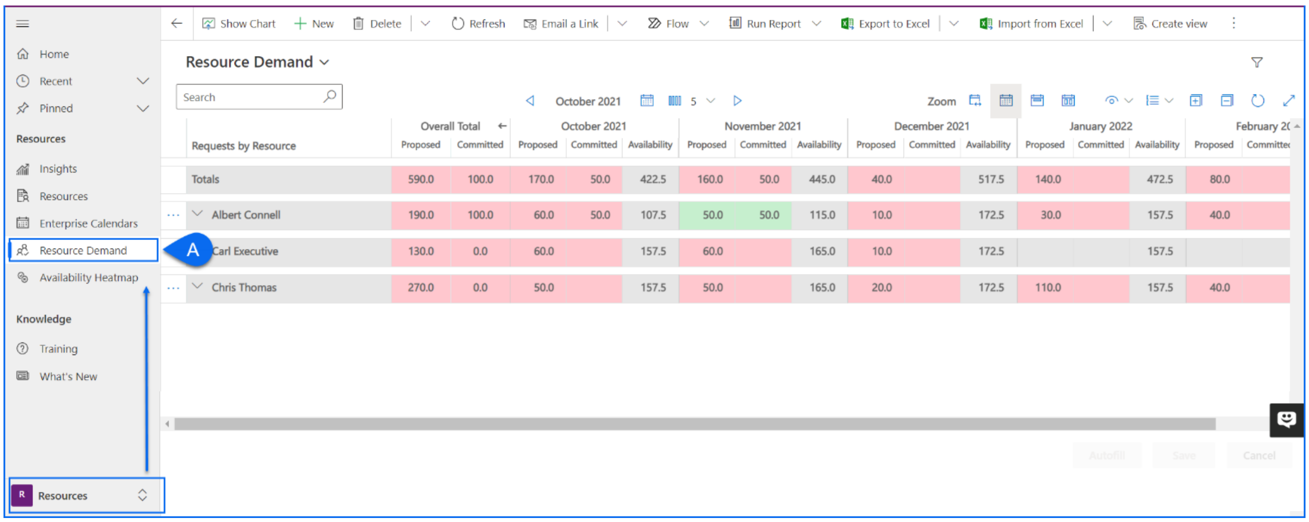


Modify and approve a request for named resources

Resource Manager   Resources > Resources > Resource Demand

1. SET THE RESOURCE DEMAND HORIZON

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

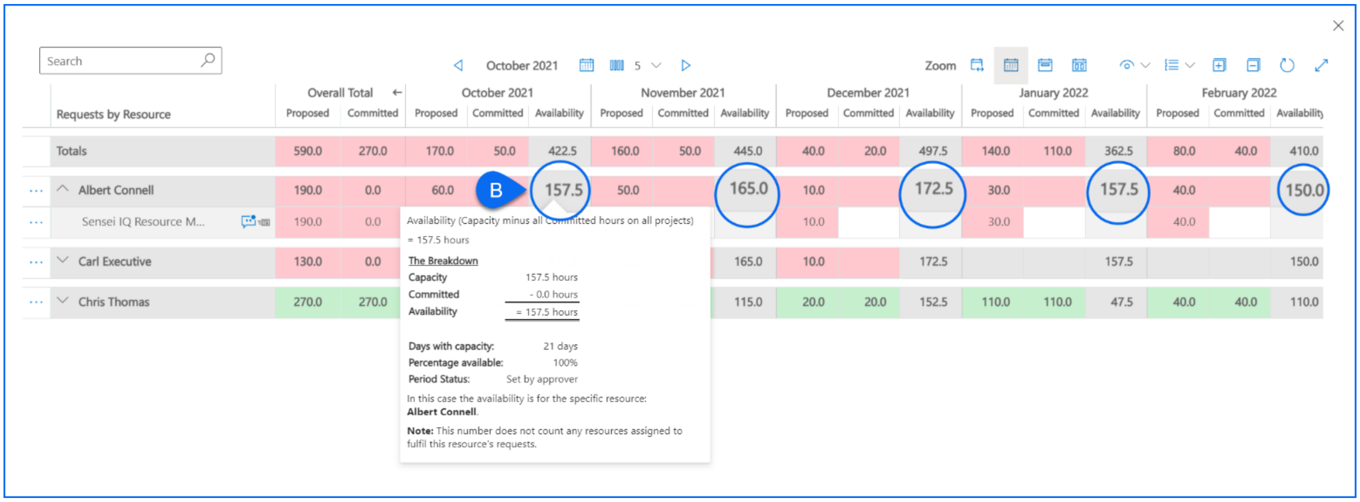


b. Follow the same steps described in the Approve a request for named resources section above.

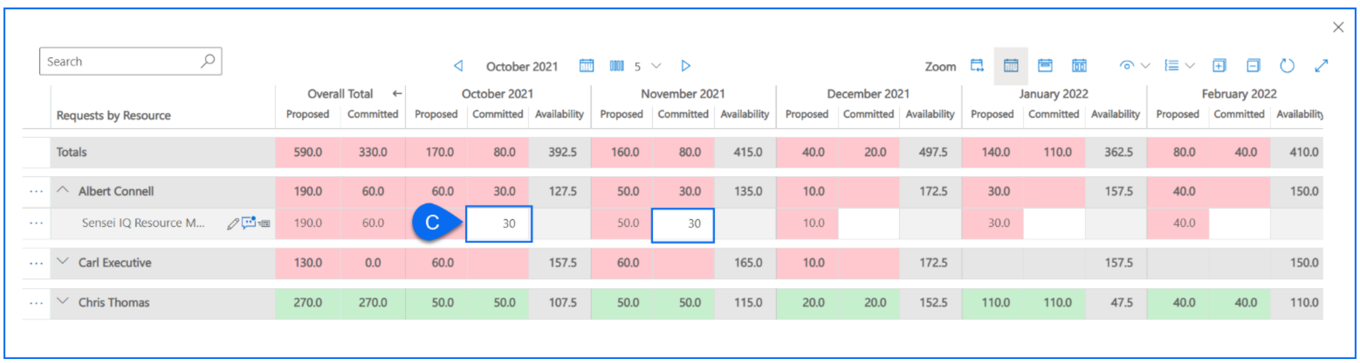
2. MODIFY THEN FULFILL A REQUEST FOR NAMED RESOURCES

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

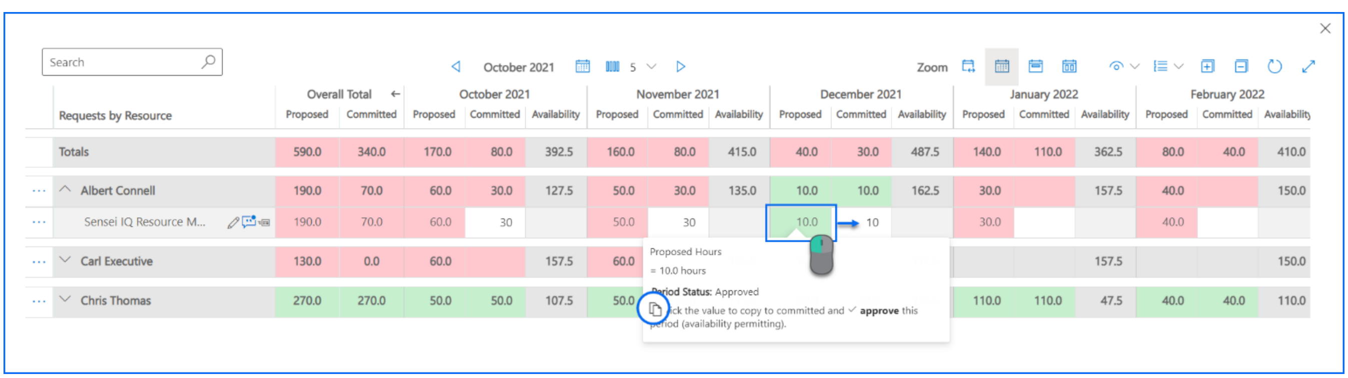
b. Hide the comments and evaluate the remaining availability of the named resource individually in the **Availability** column or the **tooltip text** when you hover the mouse over each visible period.



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.



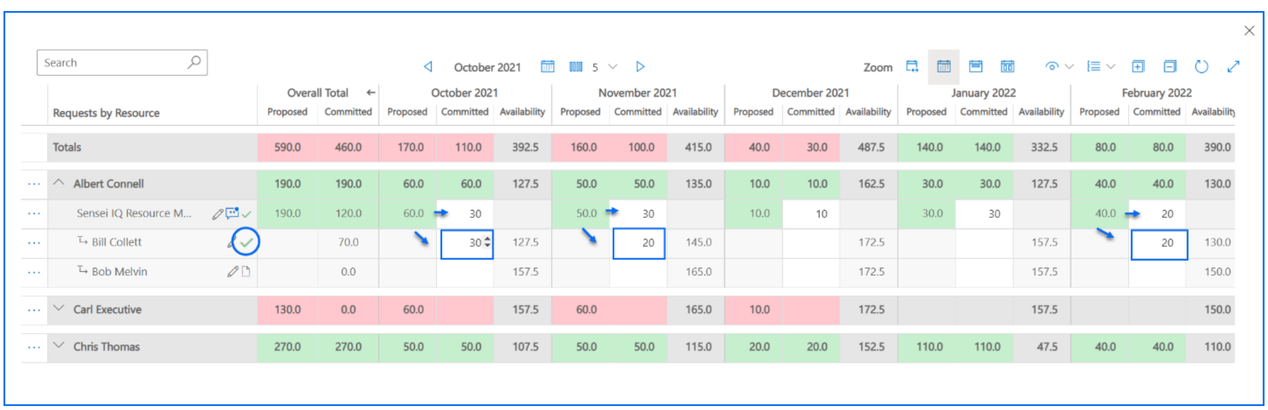
Tip: If you want to automatically fill the **Committed** cell with the proposed hours submitted (also referred to as **unfulfilled submissions**) against the pending request for a single visible period only on the **Resource Demand** page **without** any amendment, you can click the value in the **Proposed**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



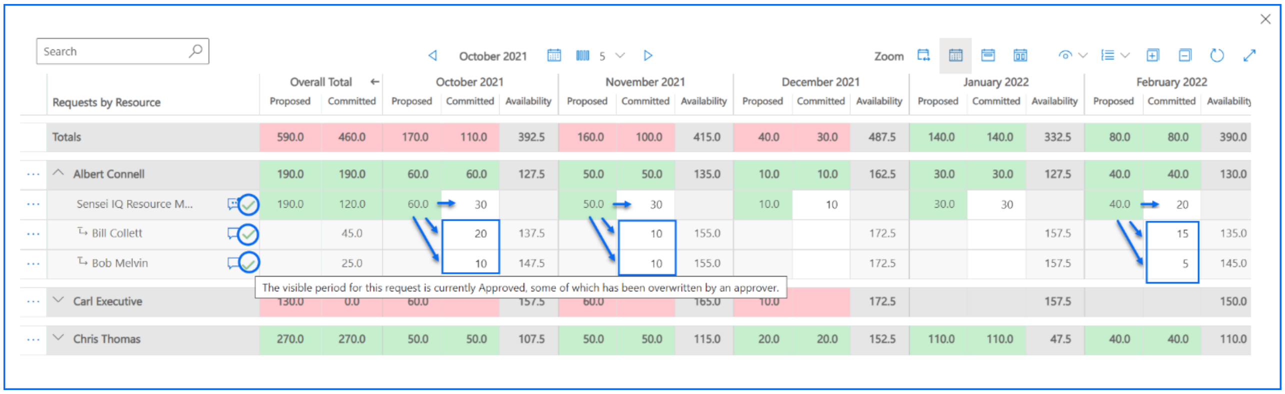
d. If you have also decided to allocate additional named resources to fulfill the request for the remaining proposed hours (also referred to as **unfulfilled submissions**), click the **Row Menu** button **(...)** in front of the project name row to view more options.

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.

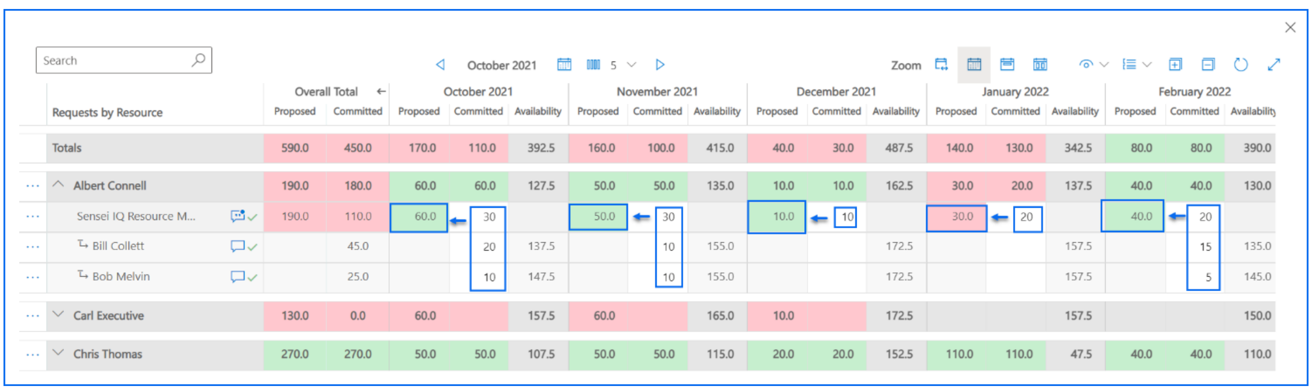
Important: Once you have added an additional named resource, the remaining proposed hours (also referred to as **unfulfilled submissions**) for the project are automatically committed to the added named resource for the visible period.



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.

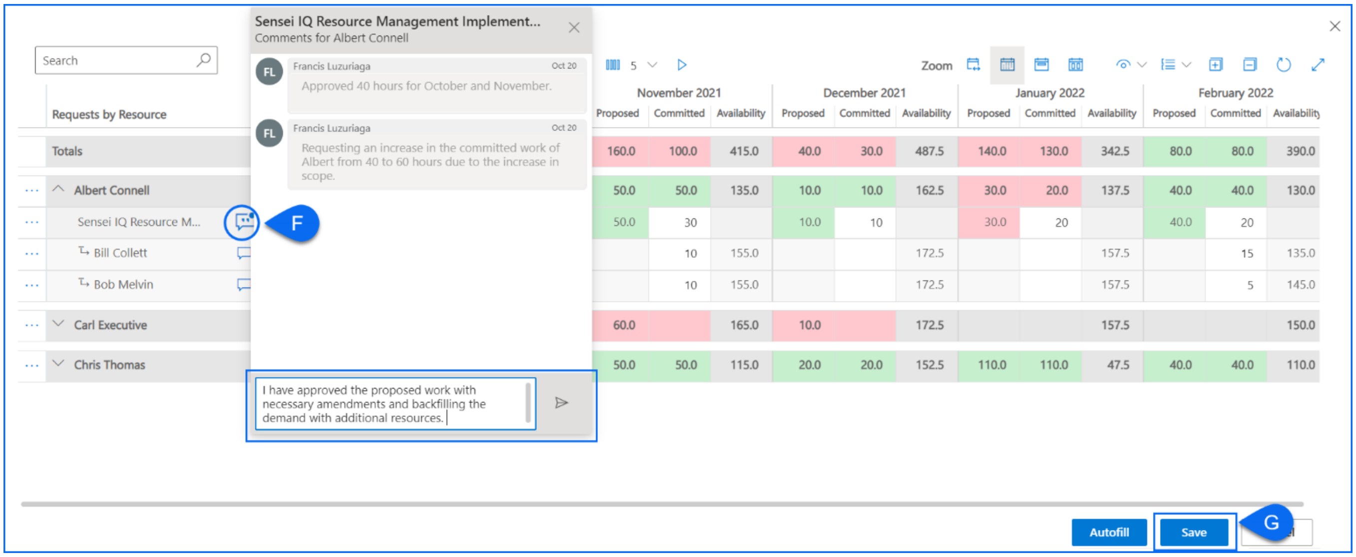


Important: At this point of the resource request approval process, the approved resource allocation (also referred to as **committed work**) is displayed in the **Committed** column as *read-write* and the cells the **Proposed** hours are contained in are highlighted in green denoting the committed hours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

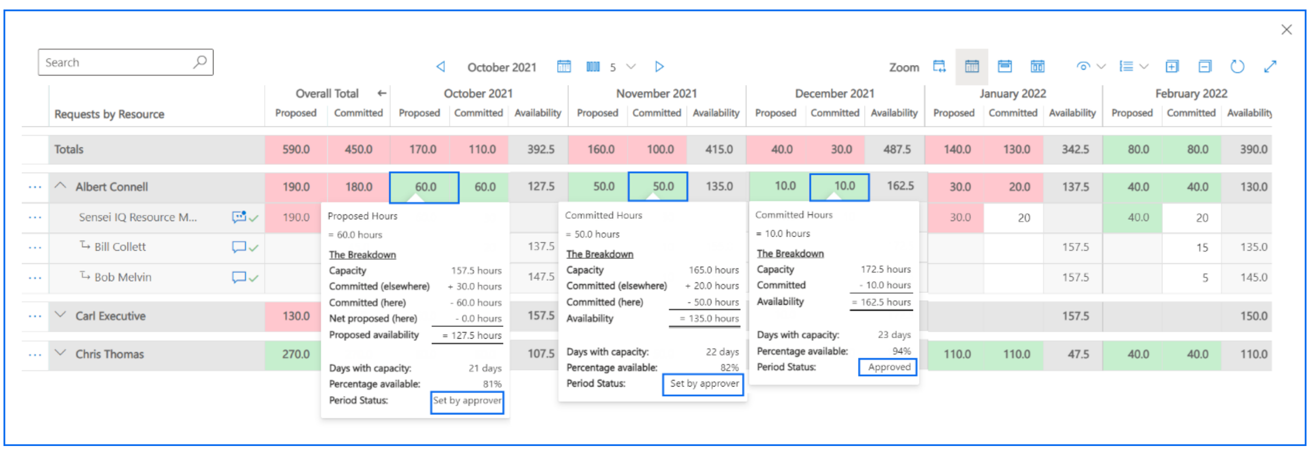


f. Attach **comments** to each fulfilled resource request to provide contextual information to the respective project managers (**recommended**).

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



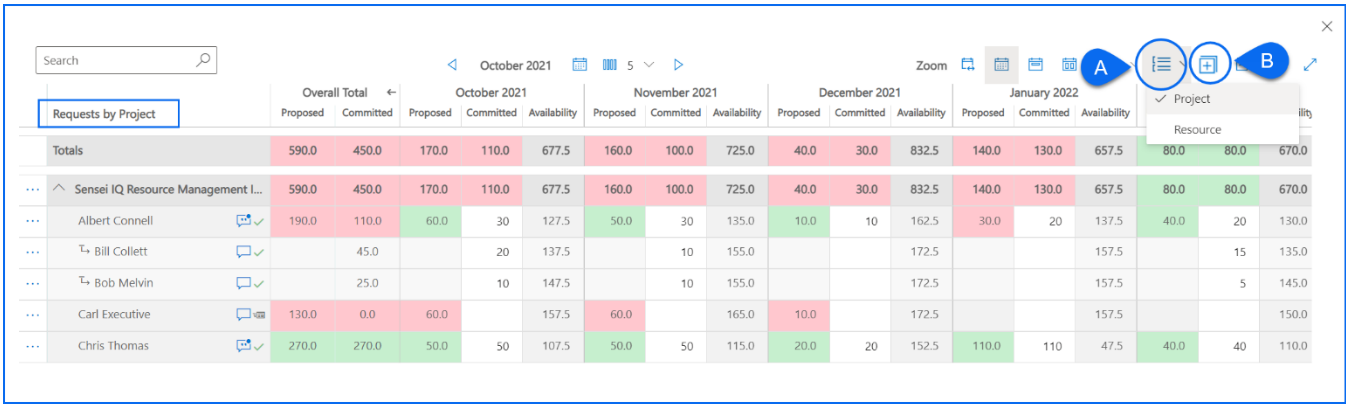
Tip: The status of both proposed and committed hours (with attached comments) is displayed as either **Set by Approver** (if the hours were manually adjusted) or **Approved** (if no amendments were made) when you hover the mouse over the approved hours in the **Proposed** cell or **Committed** cell respectively.



3. MODIFY AN EXISTING FULFILLED REQUEST FOR NAMED RESOURCES

a. Apply the **Requests by Project** view from the **Grouping** menu on the page (**recommended**).

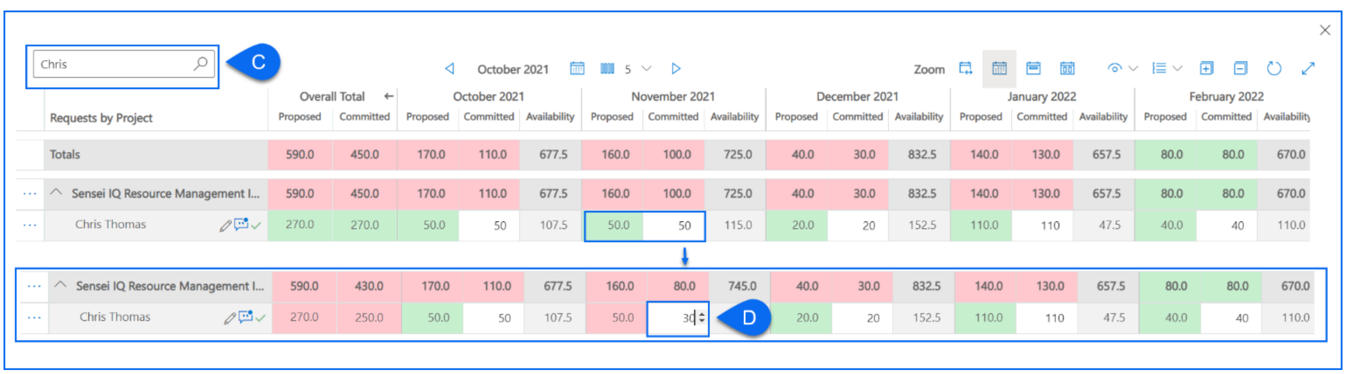
b. Click the **Expand All** button to display all named resource rows under each project name displayed on the page.



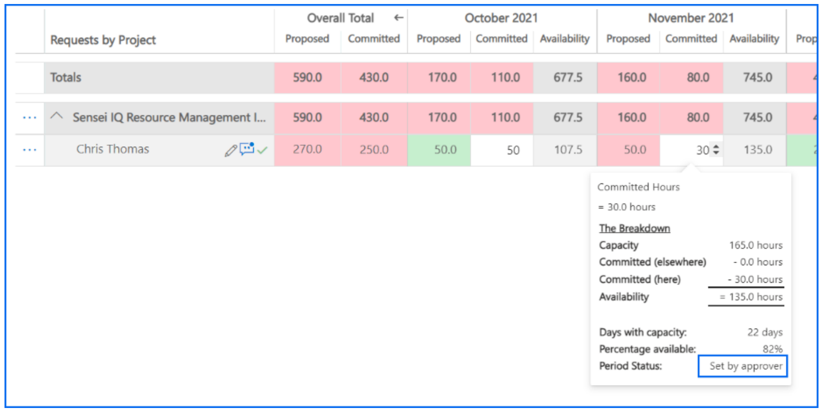
Tip: The approved resource allocation (with attached comments) is displayed in the **Committed** column as *read-only* and the cells the **Proposed** hours are contained in are highlighted in green denoting the committed hours fulfilled by the line manager is equal to the proposed hours for the period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

c. Locate the named resource row with committed work that you want to update using the **Search** field.

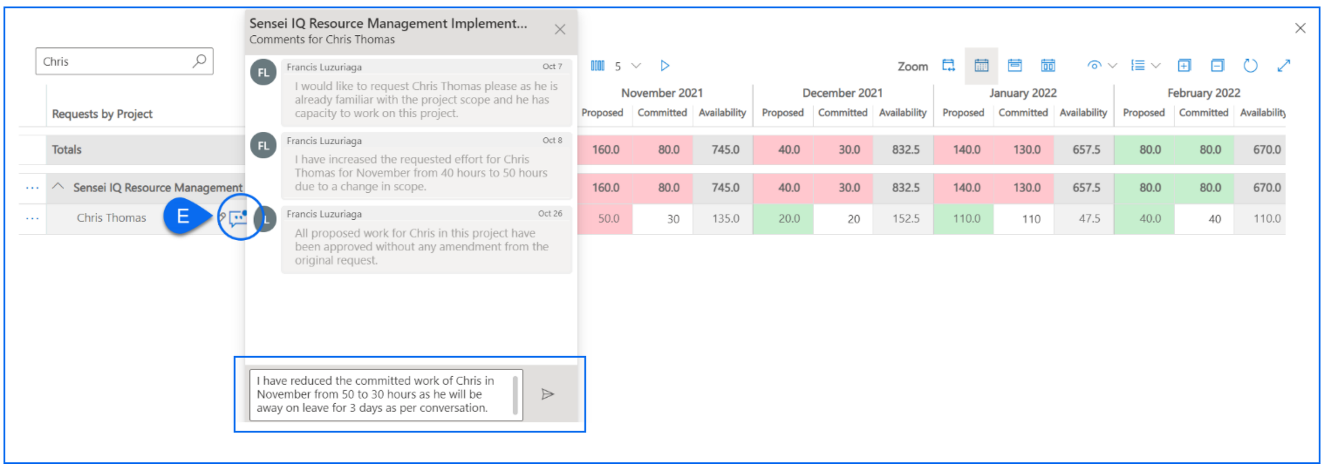
d. Modify the existing committed hours for the visible periods where relevant using the **Committed** column.



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

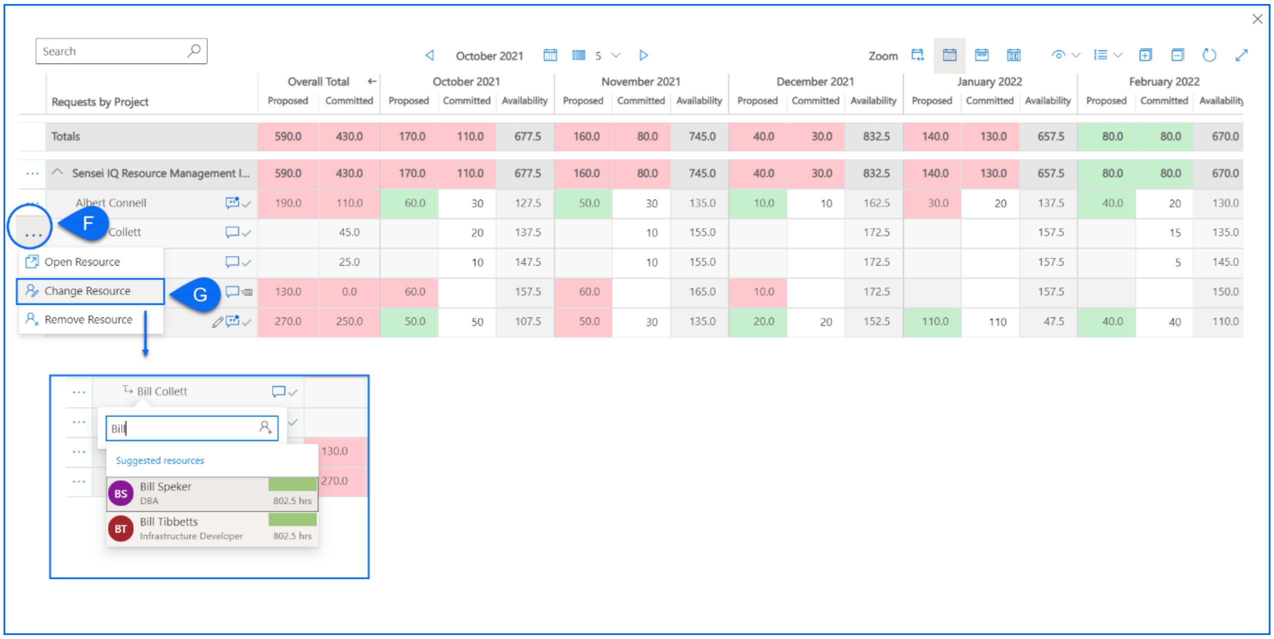


e. Attach **comments** to the modified committed work to provide contextual information to the project manager (**recommended**).



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.

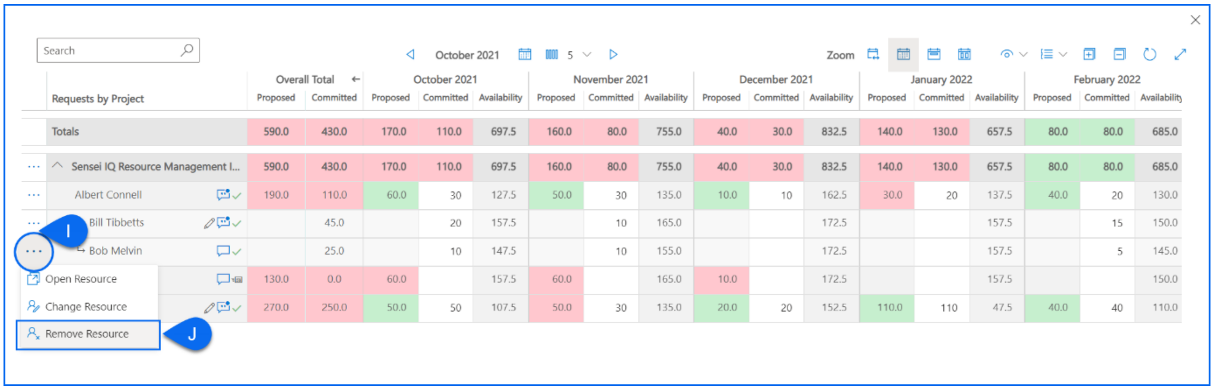
g. Select the **Change Resource** option and **Select a resource** to search then replace the named resource for the visible periods.



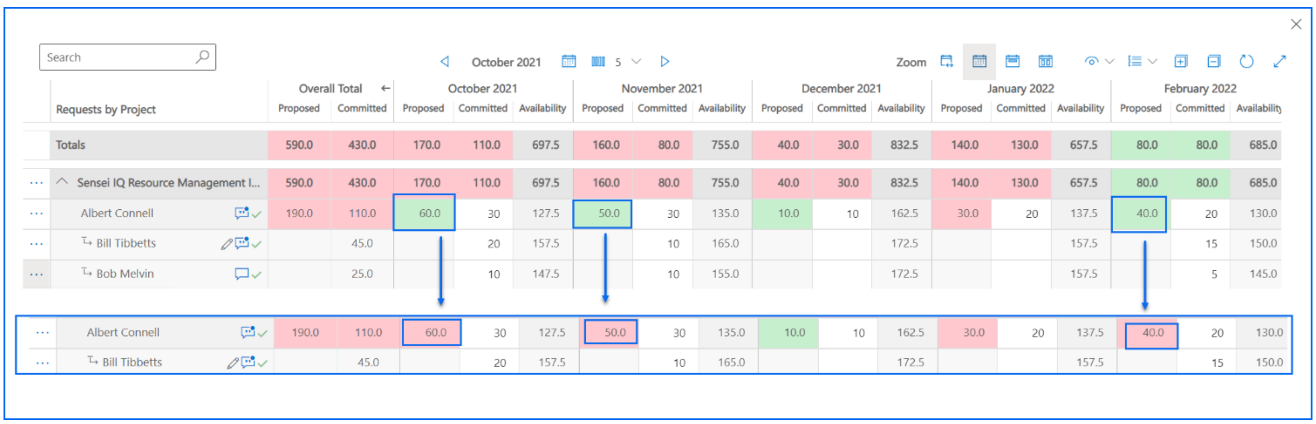
h. Attach **comments** to the modified resource allocation to provide contextual information to the project manager (**recommended**).

i. Finally, if you need to remove an allocated resource to the project, click the **Row Menu** button **(...)** in front of the named resource row that you want to remove from the project (e.g., if the resource has already left the organisation)
to view more options.

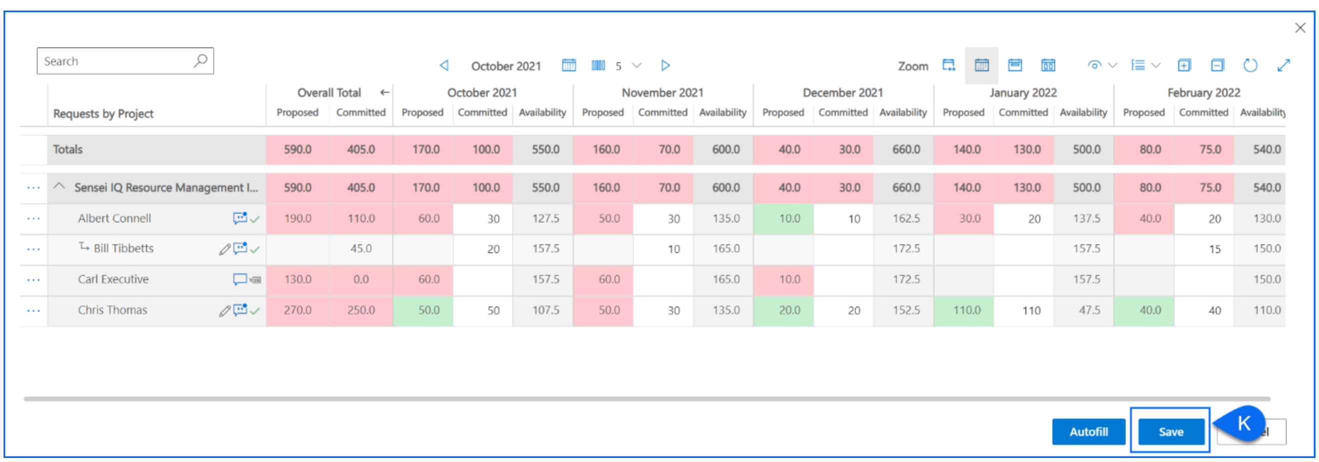
j. Select **Remove Resource** from the menu to remove the allocation of the resource against the project row displayed on the page.



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



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



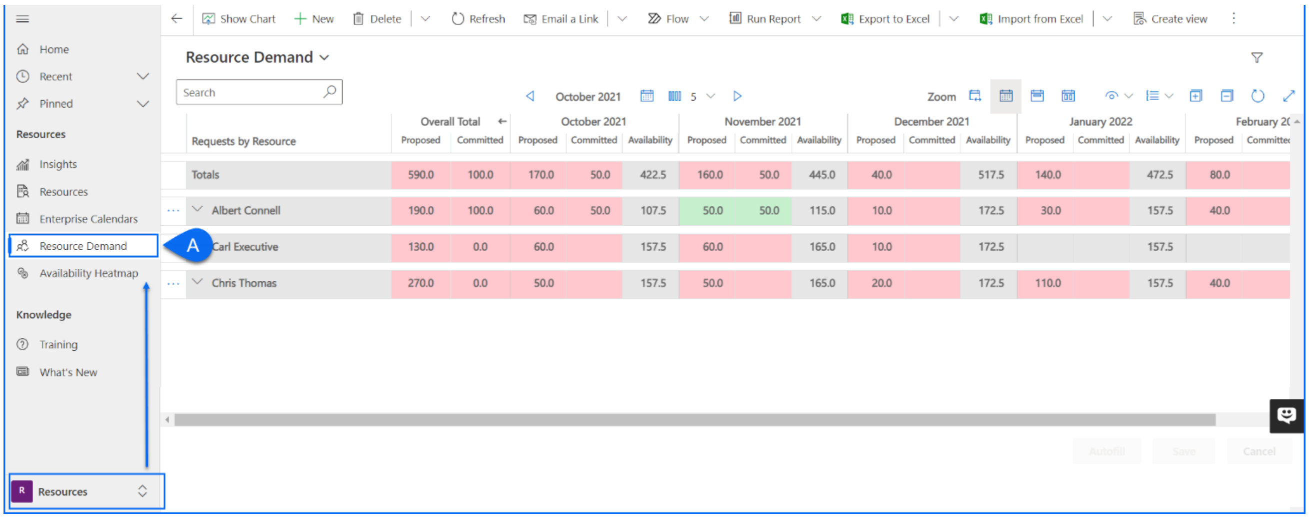
Tip: Clicking the **Cancel** button will discard the changes applied to the page.

Fulfill a submitted request for generic resources

Resource Manager — Resources > Resources > Resource Demand

1. SET THE RESOURCE DEMAND HORIZON

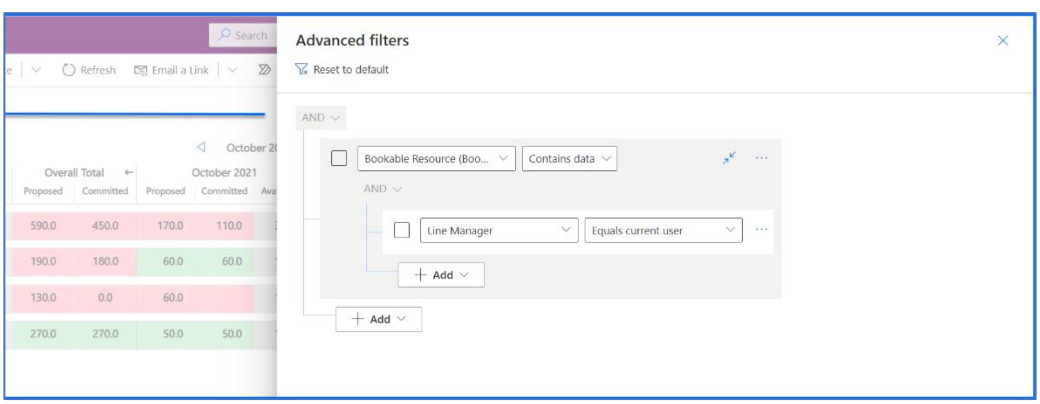
a. Ensure that you are in the **Resources** area and click **Resource Demand** in the **Resources** section.



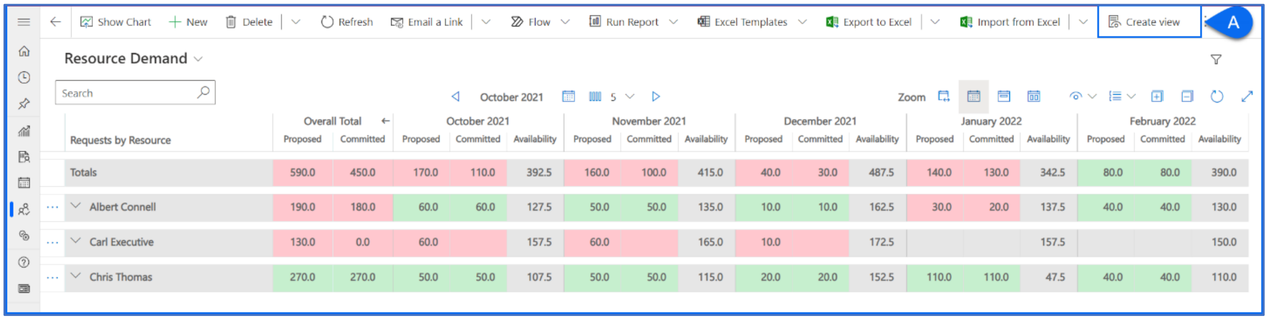
b. Follow the same steps described in the Approve a request for named resources section above.

2. HARVEST THE REQUESTS FOR GENERIC RESOURCES

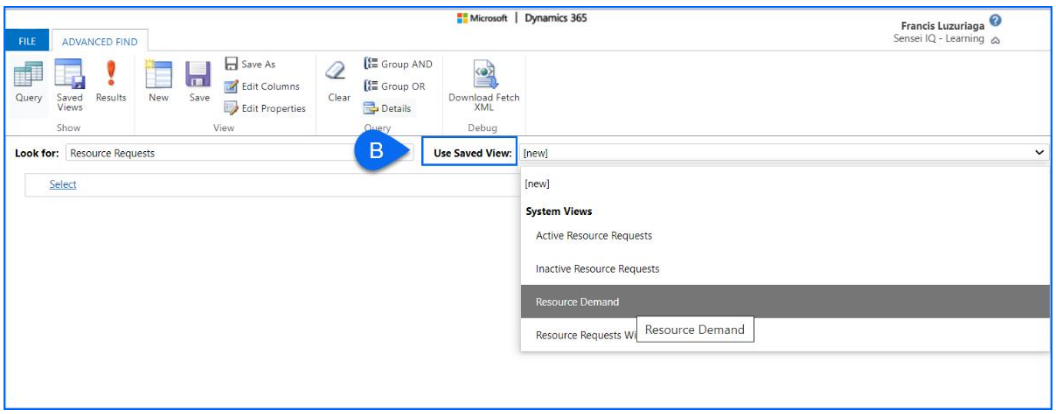
Important: The **Resource Demand** view has a system default filter to allows users to manage the demand for named resources that they are the line manager for only. Generic resources do not typically have fixed line managers. Unless the default system view is customised in your organisation's solution,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



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



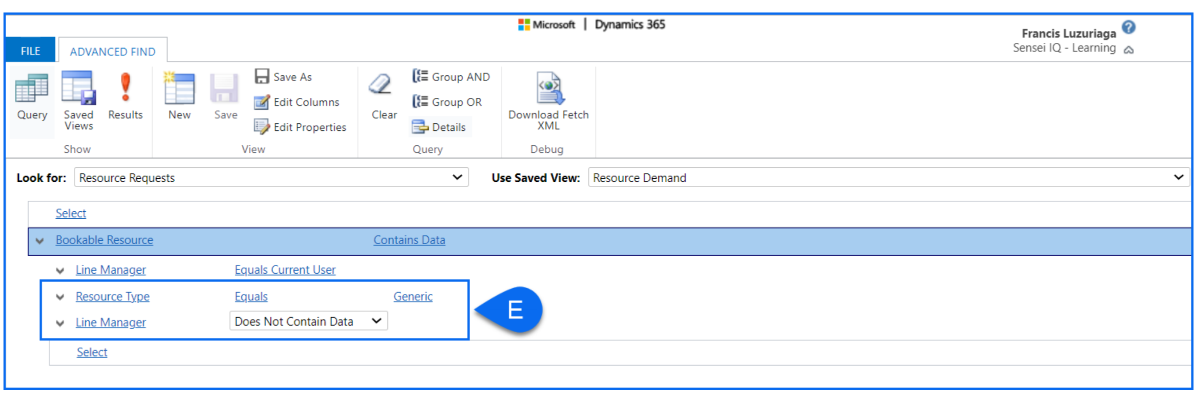
b. In the dialog box, select **Resource Demand** from the **Use Saved View** drop-down list.



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

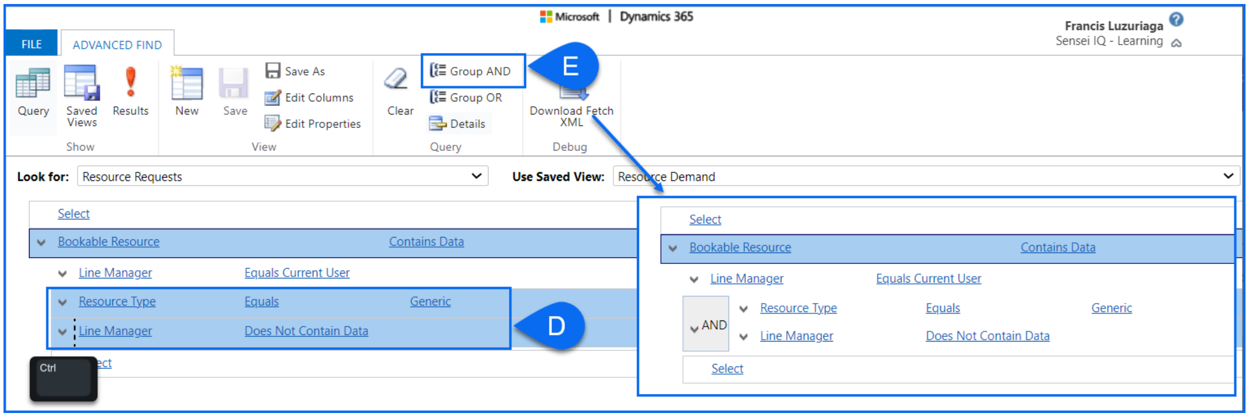
- **Resource Type – Equals - Generic**
- **Line Manager – Does Not Contain Data**

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



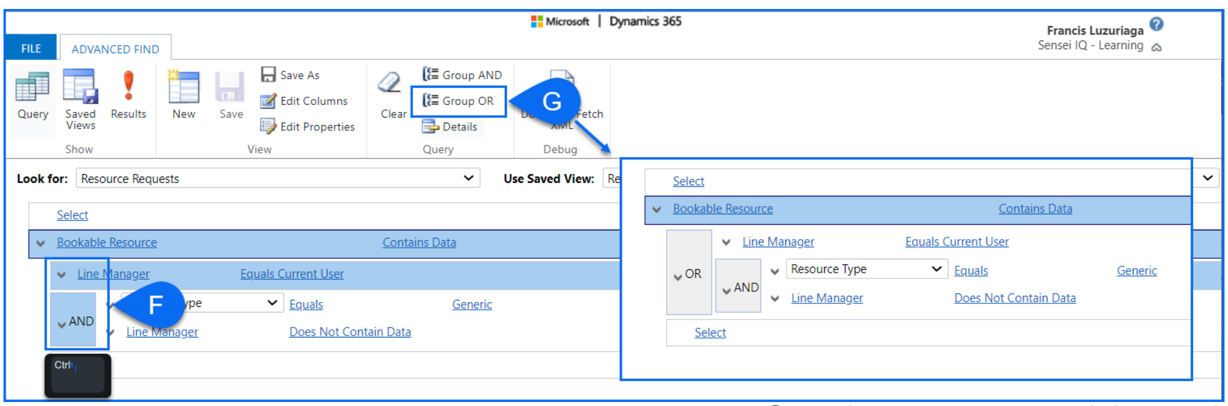
d. Press and hold the control key (**Ctrl**) on your keyboard and select the newly added filters in the view.

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



f. Press and hold the control key (**Ctrl**) on your keyboard again and select the default filter and the **AND** query line in the view this time.

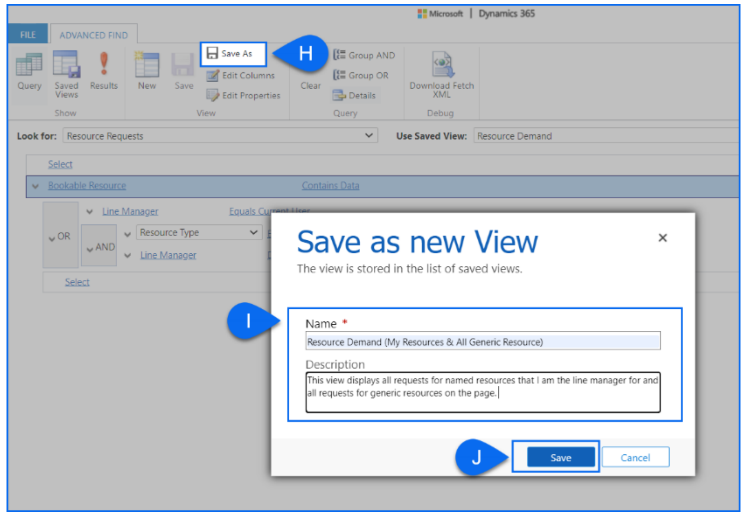
g. Click the **Group OR** button from the **Advanced Find** ribbon then release the control key (**Ctrl**) on your keyboard.



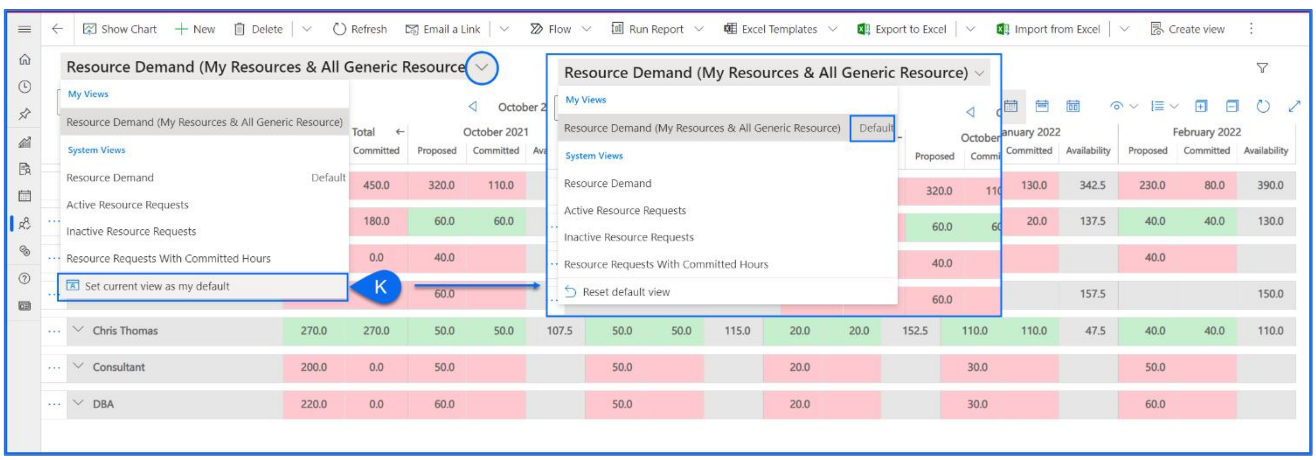
h. Once you have set the custom filters and their grouping, click the **Save As** button from the **Advanced Find** ribbon.

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

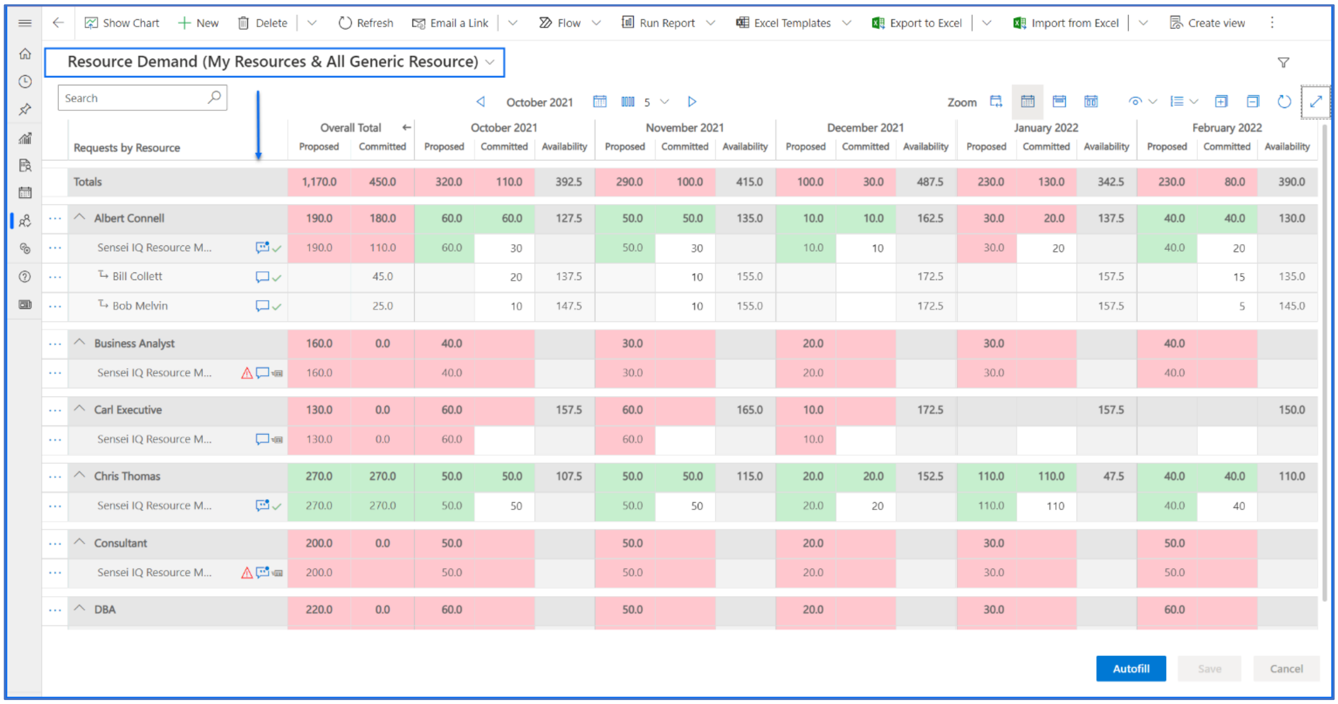
j. Click the **Save** button and close the dialog box.



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



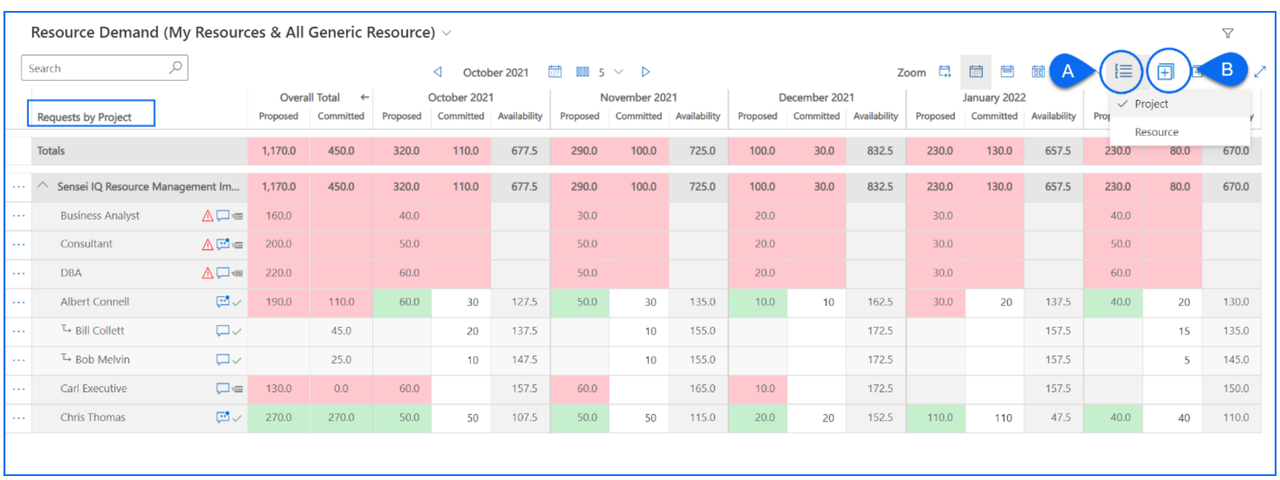
Important: Once the custom personal view is configured using the above steps, the **Resource Demand** page will always display all requests for named resources that the user is the line manager for including those for all generic resources that do not typically have fixed line managers by default.



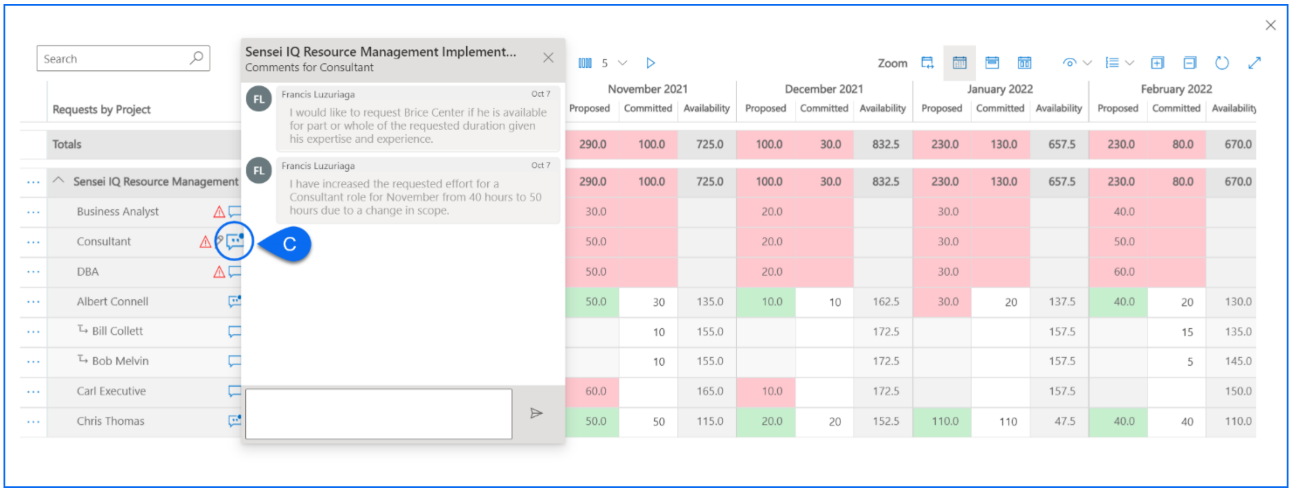
3. REVIEW AND FULFILL A REQUEST WITH NAMED RESOURCES

a. Apply the **Requests by Project** view from the **Grouping** menu on the page (**recommended**).

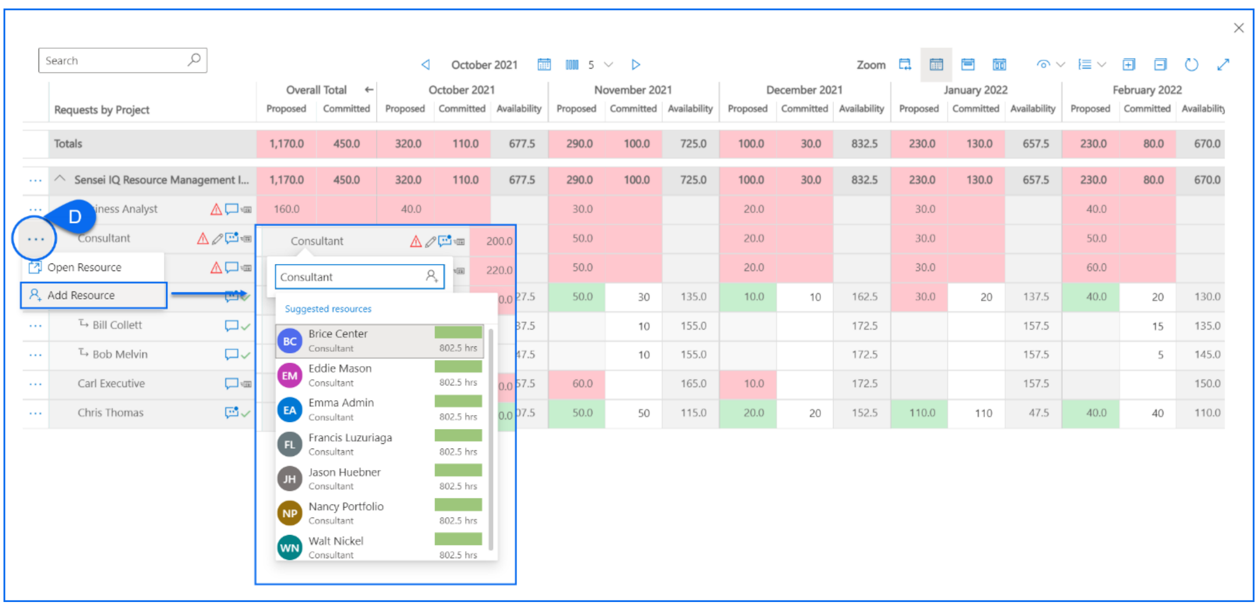
b. Click the **Expand All** button to display all named resource rows under each project name displayed on the page.



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.

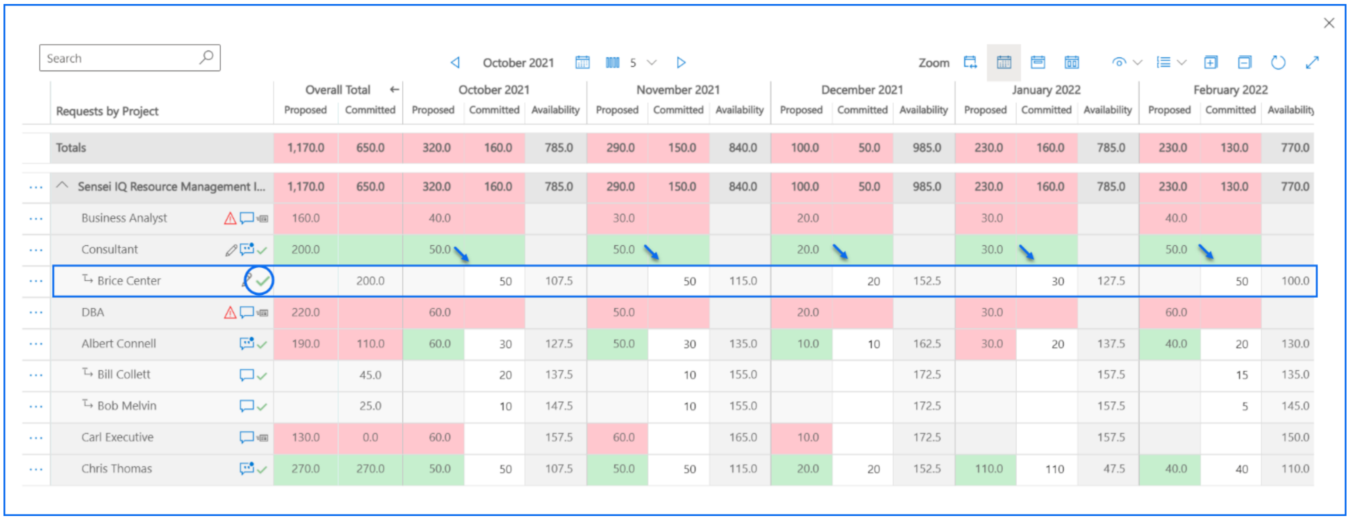


d. Hide the comments and click the **Row Menu** button (...) in front of the generic resource name and then the **Add Resource** button to search and allocate the named resource/s against the selected project row based on their primary roles and total availability for the visible periods only as displayed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



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

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



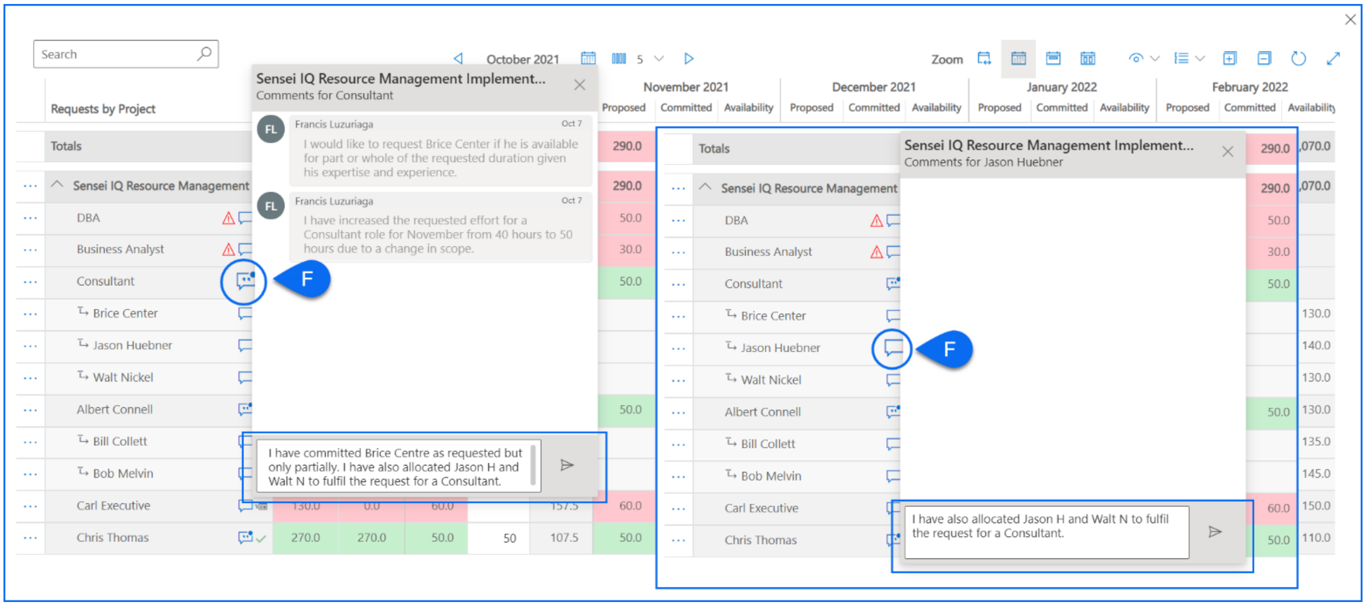
Requests by Project	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
Totals	1,170.0	650.0	320.0	160.0	785.0	290.0	150.0	840.0	100.0	50.0	985.0	230.0	160.0	785.0	230.0	130.0	770.0
Sensei IQ Resource Management I...	1,170.0	650.0	320.0	160.0	785.0	290.0	150.0	840.0	100.0	50.0	985.0	230.0	160.0	785.0	230.0	130.0	770.0
Business Analyst	160.0		40.0			30.0			20.0			30.0			40.0		
Consultant	200.0		50.0			50.0			20.0			30.0			50.0		
Brice Center		200.0		50	107.5		50	115.0		20	152.5		30	127.5		50	100.0
DBA	220.0		60.0			50.0			20.0			30.0			60.0		
Albert Connell	190.0	110.0	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

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

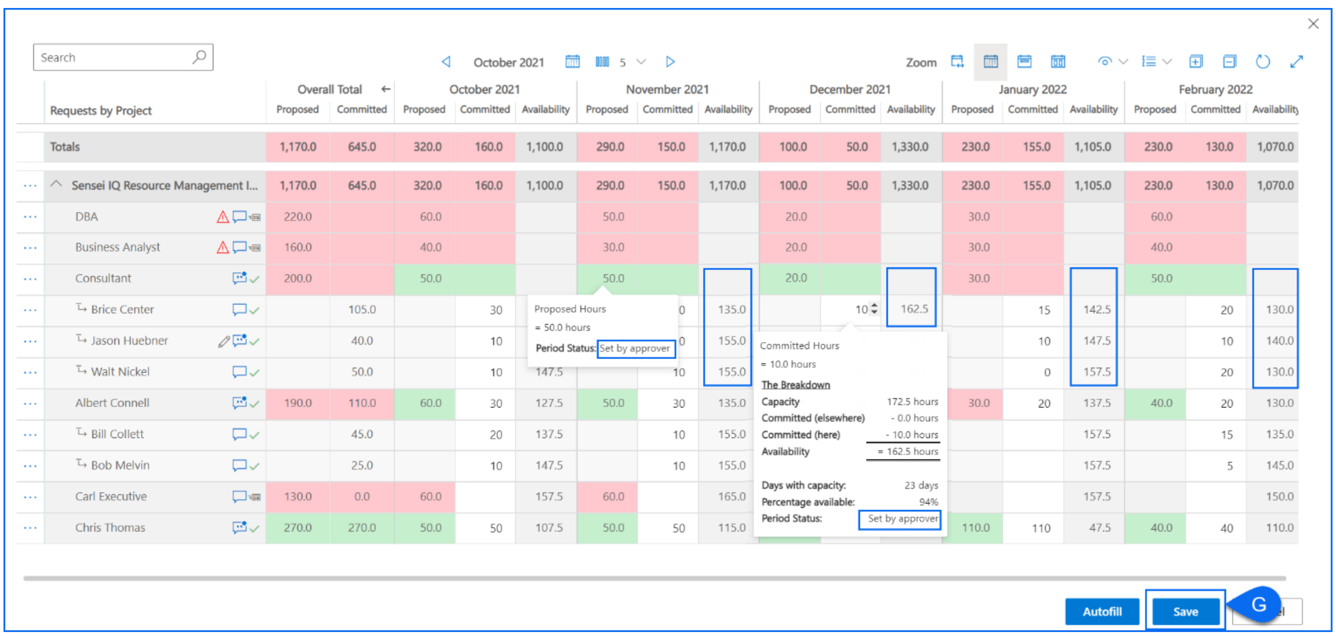
Requests by Project	Overall Total		October 2021			November 2021			December 2021			January 2022			February 2022		
	Proposed	Committed	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability	Proposed	Committed	Availability
Totals	1,170.0	645.0	320.0	160.0	1,100.0	290.0	150.0	1,170.0	100.0	50.0	1,330.0	230.0	155.0	1,105.0	230.0	130.0	1,070.0
Sensei IQ Resource Management I...	1,170.0	645.0	320.0	160.0	1,100.0	290.0	150.0	1,170.0	100.0	50.0	1,330.0	230.0	155.0	1,105.0	230.0	130.0	1,070.0
DBA	220.0		60.0			50.0			20.0			30.0			60.0		
Business Analyst	160.0		40.0			30.0			20.0			30.0			40.0		
Consultant	200.0		50.0			50.0			20.0			30.0			50.0		
Brice Center		105.0		30	127.5		30	135.0		10	162.5		15	142.5		20	130.0
Jason Huebner		40.0		10	147.5		10	155.0		0	172.5		10	147.5		10	140.0
Walt Nickel		50.0		10	147.5		10	155.0		10	162.5		0	157.5		20	130.0
Albert Connell	190.0	110.0	60.0	30	127.5	50.0	30	135.0	10.0	10	162.5	30.0	20	137.5	40.0	20	130.0
Bill Collett		45.0		20	137.5		10	155.0			172.5			157.5		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

Important: If you commit additional named resources, you need to adjust the allocation of committed work proportionally in the **Committed** cell for each visible period where required. At this point of the resource request approval process, the approved resource allocation against the primary role (also referred to as **committed work**) is displayed in the **Committed** column as *read-write* and the cells the **Proposed** hours are contained in are highlighted in green denoting the committed hours fulfilled by the line manager is equal to the proposed hours for the period requested. Otherwise, the cells they are contained in would be highlighted red denoting that the committed hours fulfilled by the line manager is either less or more than the proposed hours for the period requested.

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



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



Tip: The status of both proposed and committed hours (with attached comments) 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.

