## Overview

This Job Aid defines the steps to follow for creating and maintaining Enterprise Resources in Sensei IQ.

There are three (3) actions required for creating and maintaining enterprise resources. Create and maintain resources is a required action, the remaining two will be based on your resource management requirements.

1. Create and maintain resources
2. Bulk edit resources
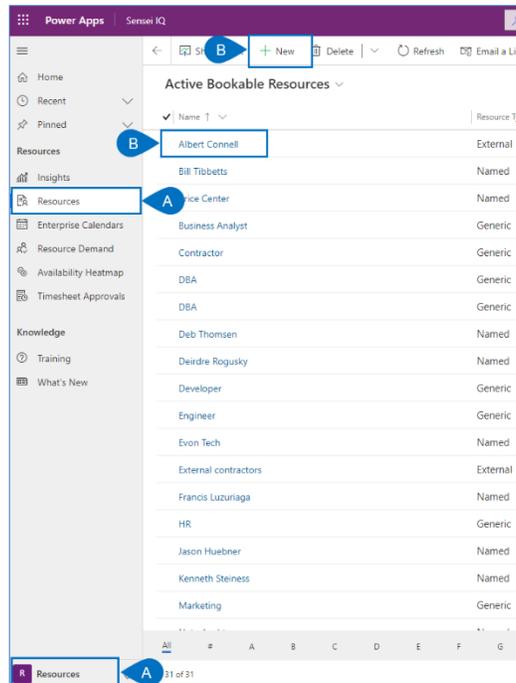3. Create and maintain resource rates

# Create and maintain resources

👤 **Resource Manager**                                                    🔧 **Resources**

### 1. CREATE AND MAINTAIN RESOURCES

a. Ensure you are in the **Resources area,** click **Resources** in the **Resources** section.

b. Click **+ New** from the command bar to create a **new resource** or **select and edit** an existing resource to make changes to an existing resource.



c. Define the **Resource Type** (Named, Generic or External).

d. For **Named Resources only** search for and **select the Resource** from the Organizational Directory.

e. Fill in the **Name** field with the name that will be used to **reference the resource in Sensei IQ**.  This can be the same as that in the Organizational Directory.

f. Define the **Primary Role** for the resource.  This lookup table is driven from the **Generic Resources** defined in the organization and is used in Resource Capacity and Demand.

**New Bookable Resource**

General   Calendar Exceptions   Rates   Allocation

| Resource Type | * Named | C |
| User | * --- | D |
| Name | * --- | E |
| Department | --- | |
| Primary Role | --- | F |

g.  Search for and select the individual who will be the **Line Manager** for this resource.  The Line Manager is responsible for **capacity and demand management** for this resource as well as **approving the Resource Requests** for this resource.

h.  If your organization is using Sensei IQ to **manage project financials**, define the **default cost category** for this resource.

i.  If your organization will be using the **Sensei Timesheet** indicate whether this resource will be required to **complete timesheets** and **the Timesheet Manager** who will be responsible for reviewing and approving their timesheets

j.  If your organization allows **Team Members to create calendar exceptions**, indicate whether this specific resource will be able to create their own calendar exceptions by **setting the Allow to create exceptions field**.

| Line Manager | --- | 🔍 | G |
| Default Cost Category | --- | 🔍 | H |
| Required to complete timesheet | * ⬤ Yes | | I |
| Timesheet Manager | --- | 🔍 | |
| Allow to create exceptions | ⬤ Yes | J | |
| Location | --- | | |
| Time Zone | --- | | |
| Start Date | --- | 📅 | |
| End Date | --- | 📅 | |

k.  Search for and select the appropriate **Calendar** to define the **working time for this resource**.

| Enterprise Calendar | --- | K | 🔍 |
| Target Utilization % | 100 | | |

l.  Other fields not explicitly referenced in this job aide should be completed based on organizational standards.

m.  Click **Save and Close** to update or create the resource.
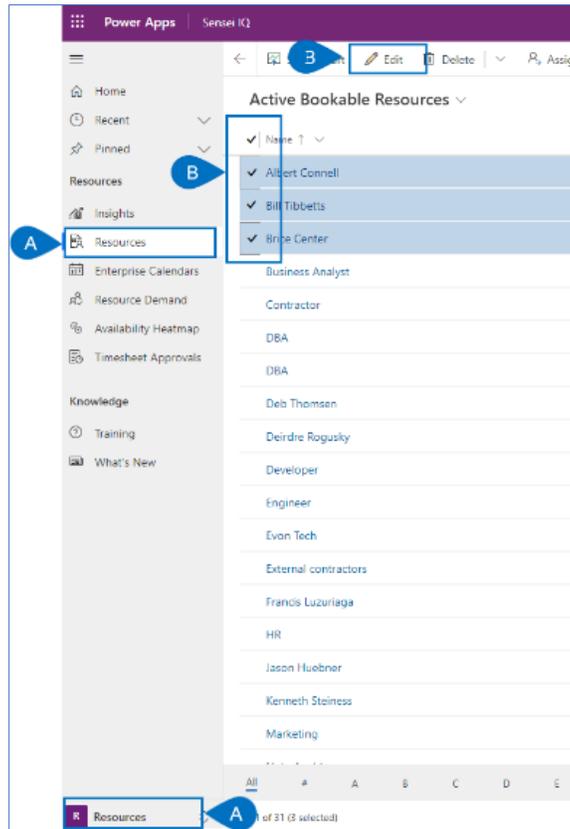
← | ⬜ | 💾 Sa M | 💾 Save & Close | + New | 🗑 Delete | ≫ Flow ⌄

**New Bookable Resource**
Bookable Resource · Information ⌄

## Bulk Edit Resources

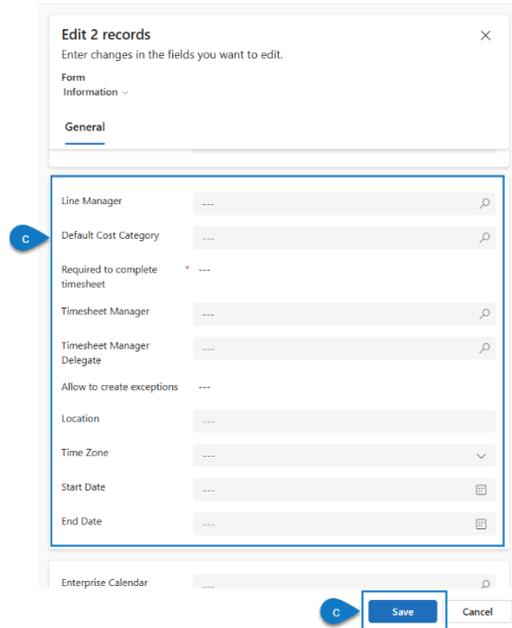👤  **Resource Manager**                                    🔧  **Resources**

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1. **BULK EDIT RESOURCES**

   a. Ensure you are in the **Resources area,** click **Resources** in the **Resources** section.

   b. Select **all the resources** you wish to bulk edit and click **Edit.**



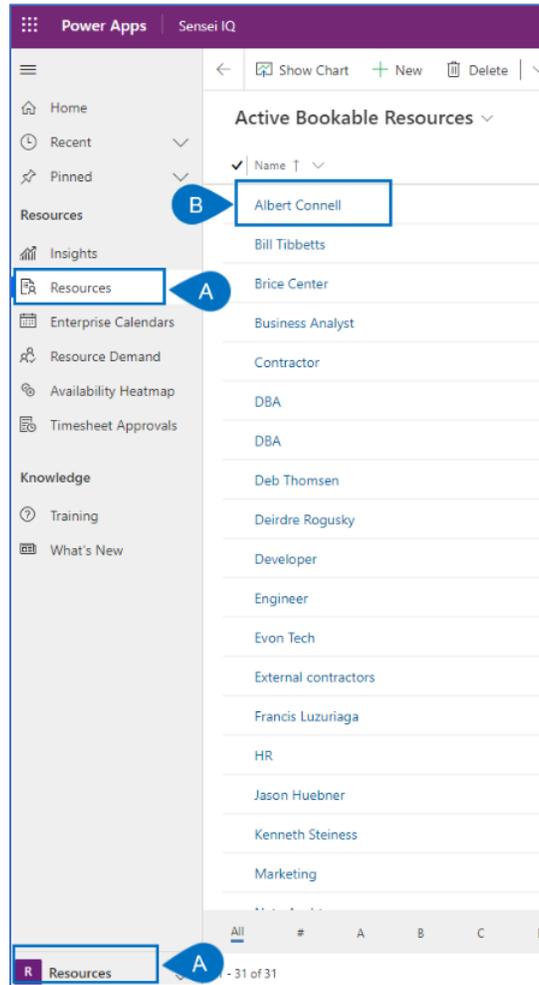   c. **Update the appropriate fields** on the bulk edit form and click **Save.**

# Create and maintain Resource rates

👤 **Resource Manager**                                    🔧 **Resources**
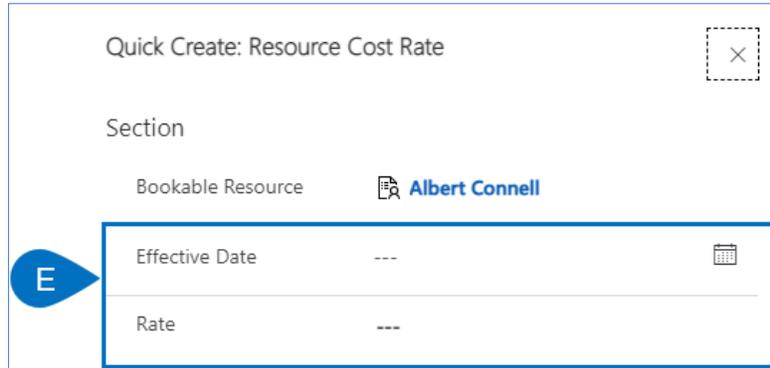
### 1. CREATE AND MAINTAIN RESOURCE RATES

a.   Ensure you are in the **Resources area,** click **Resources** in the **Resources** section.

b.   Select and edit the **resource for whom** you wish to define or update **Cost or Sell Rates**.

c.  Ensure you are on the **Rates** tab for the selected resource.
d.  Select and edit an existing **Cost or Sell Rate row** or click **New Resource Cost Rate** or **New Resource Sell Rate** to create a new entry.
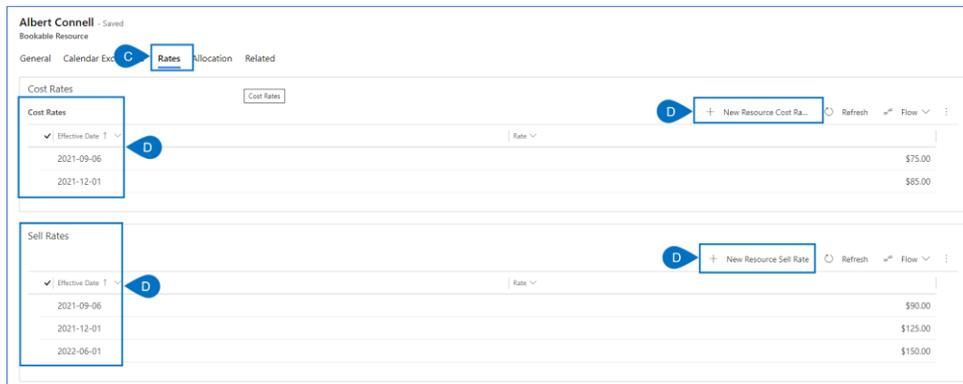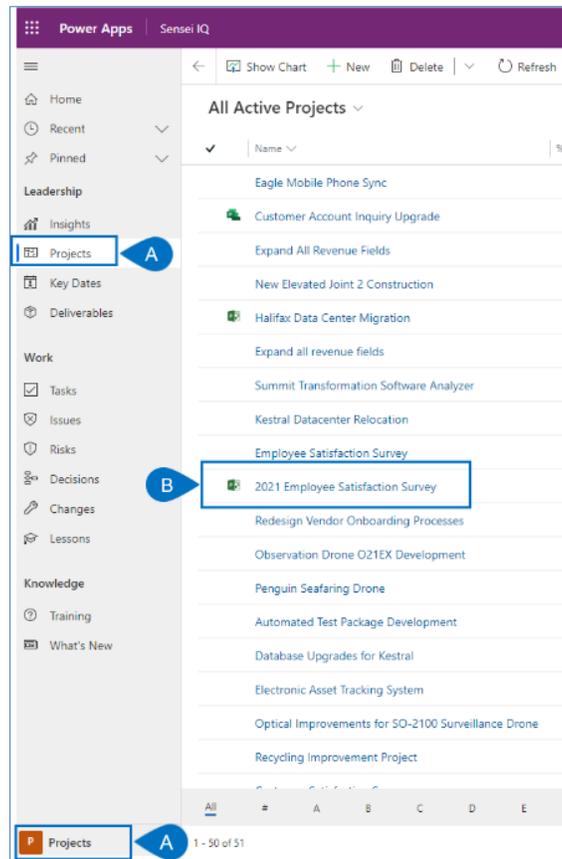


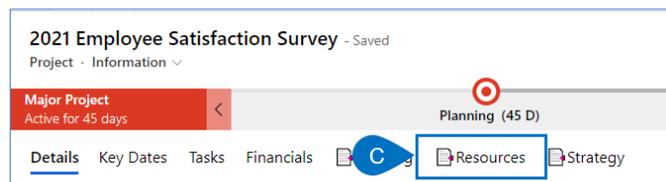e.  Define the Cost (or Sell) **Effective Date** and **Rate** and click **Save**.

## 2. CREATE PROJECT OVERRIDE SELL RATES

a.  Ensure you are in the **Projects area,** click **Projects** in the **Leadership** section.

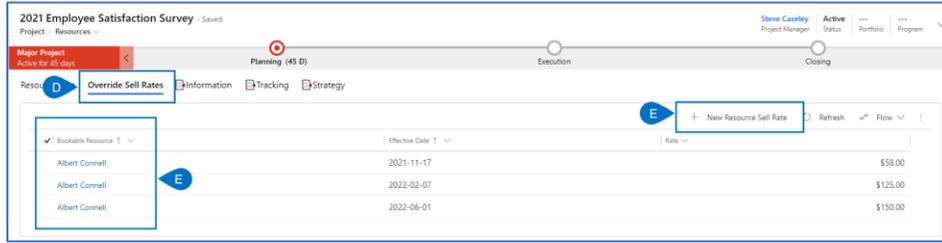b.  Select and edit the **Project** for which you wish create a Resource Sell Rate Override.



c.  Ensure you are on the **Resources grouping tab**.



d.  Ensure you are on the **Override Sell Rates tab**.

e.  Select and edit an existing **Override Sell Rate row** or click **New Resource Sell Rate** to create a new entry.



f.  Search for and select the **Resource for whom** you wish to create a Sell Rate Override.
g.  Define the **Sell Effective Date** and **Rate** and click **Save**.