Overview

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

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.
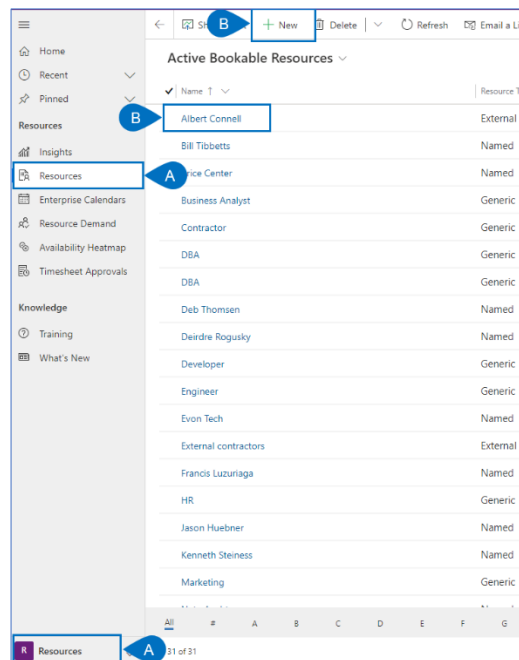
Create and maintain resources

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 Organisational Directory.
e. Fill in the **Name** field with the name that will be used to **reference the resource**. This can be the same as that in the Organisational Directory.
f. Define the **Primary Role** for the resource. This lookup table is driven from the **Generic Resources** defined in the organisation and is used in Resource Capacity and Demand.

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 organisation 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.

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

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

k. Click **Save and Close** to update or create the resource.
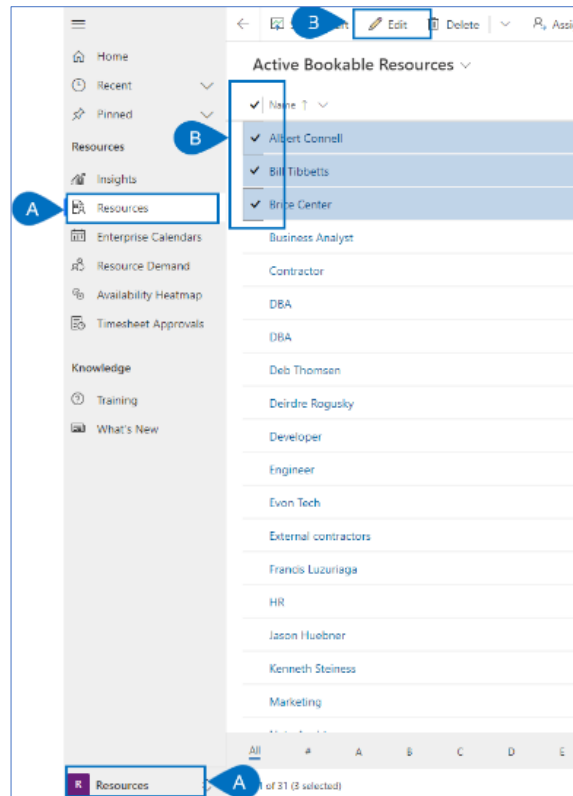
Bulk Edit Resources

👤 Resource Manager   🔧 Resources

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.**

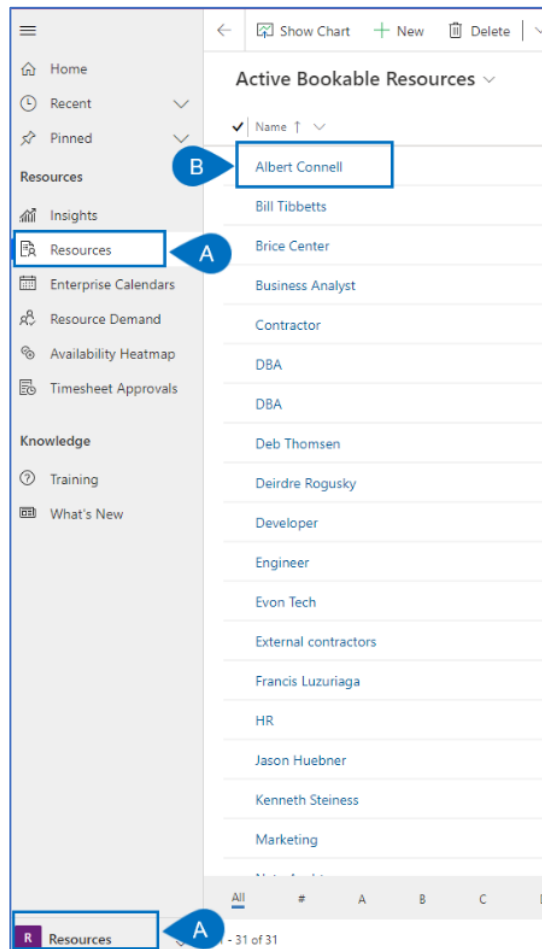## Create and maintain Resource rates

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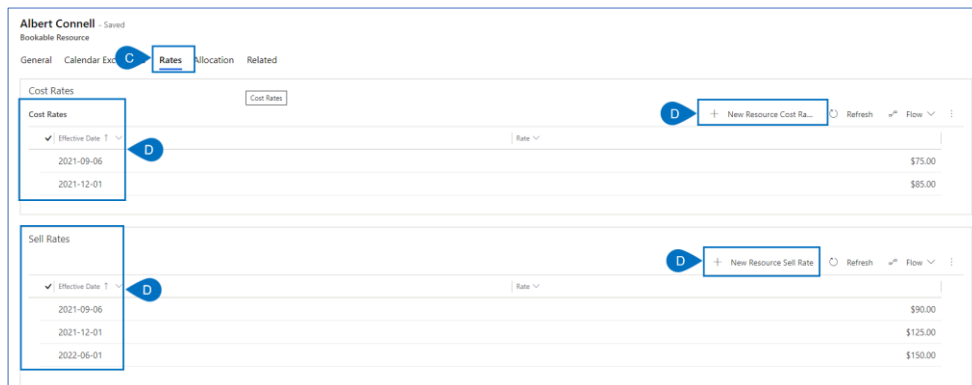
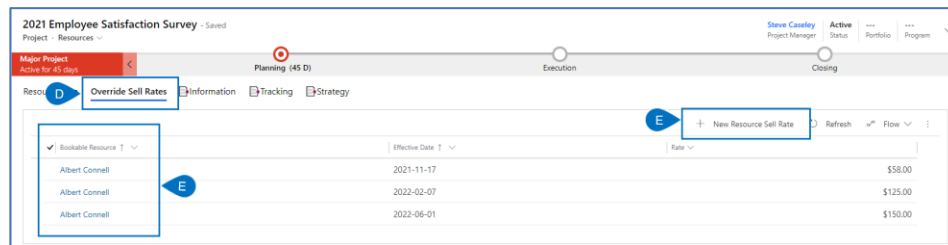e. Define the Cost (or Sell) **Effective Date** and **Rate** and click **Save**.

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 to 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.**