

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



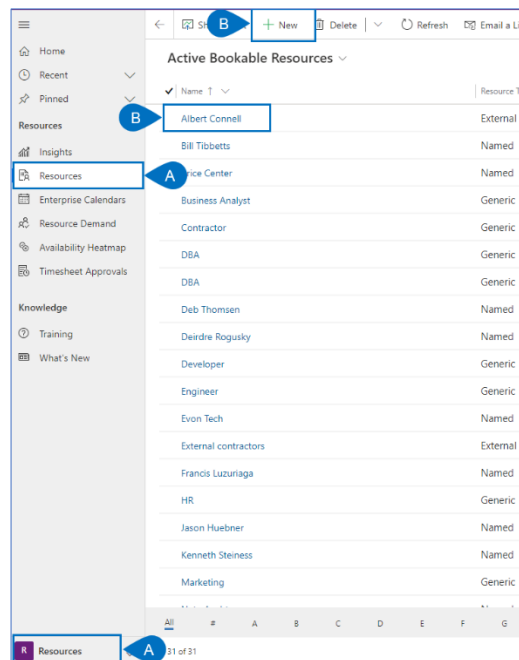
Resource Manager



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.

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 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.

Line Manager --- G

Required to complete timesheet * ☐ No H

Timesheet Manager ---

Location ---

Time Zone ---

Start Date ---

End Date ---

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

Enterprise Calendar --- I

Target Utilization ---

- 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.

< **K** Save & Close + New Flow v

New Bookable Resource

General | Calendar Exceptions | Rates | Allocation

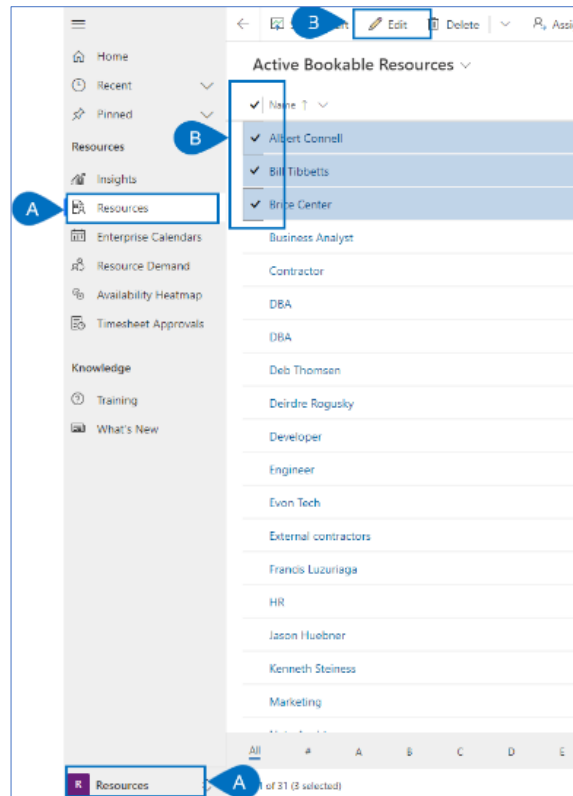
Bulk Edit Resources

 Resource Manager

 Resources

1. BULK EDIT RESOURCES

- Ensure you are in the **Resources area**, click **Resources** in the **Resources** section.
- Select **all the resources** you wish to bulk edit and click **Edit**.



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

Edit 3 records
Enter changes in the fields you want to edit.

Form
Bookable Resource

General | Calendar Exceptions | Allocation

Resource Type*

User

Name*

Department

Primary Role

Related Resource

Line Manager
Look for Line Manager
Required to complete timesheet*
Timesheet Manager
Location
Time Zone
Start Date
End Date

Enterprise Calendar
Target Utilization

Save Cancel

Create and maintain Resource rates



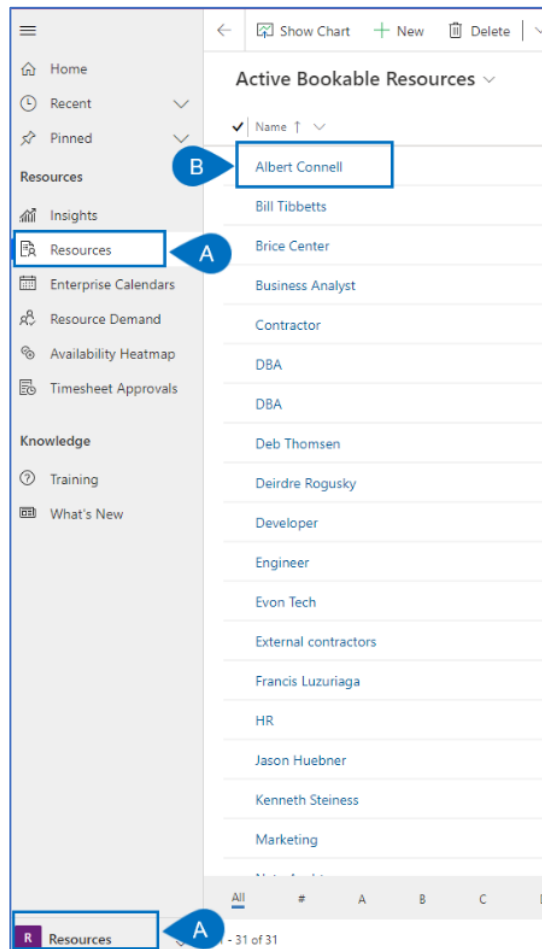
Resource Manager



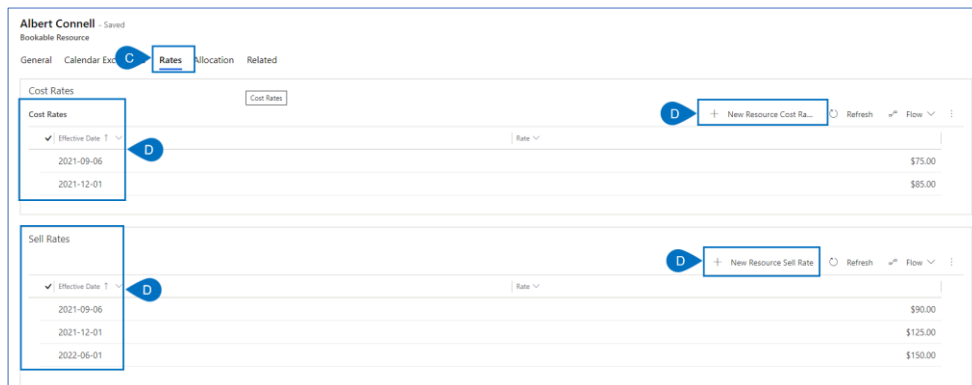
Resources

1. CREATE AND MAINTAIN RESOURCE RATES

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

Quick Create: Resource Cost Rate

Section

Bookable Resource Albert Connell

Effective Date

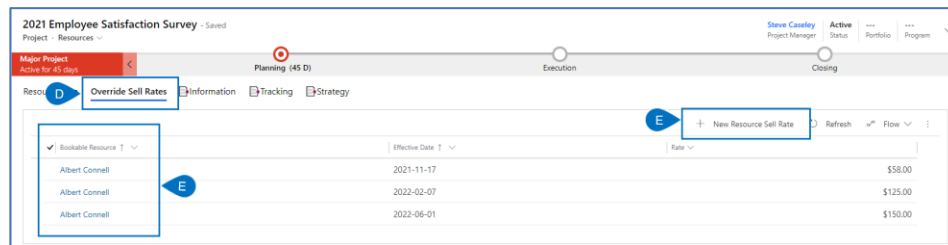
Rate

2. CREATE PROJECT OVERRIDE SELL RATES

- Ensure you are in the **Projects area**, click **Projects** in the **Leadership** section.
- Select and edit the **Project** for which you wish to create a Resource Sell Rate Override.

- 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**.

Quick Create: Resource Sell Rate

Section

Bookable Resource

Effective Date

Rate