

Overview

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

There are two types of calendars. The first, Enterprise Calendar, defines the typical working days per week and the second, Resource Calendar, defines exceptions for additional non-working time for a specific resource. At a minimum, a single Enterprise Calendar is required to define organizational work time and the exceptions for company-wide non-work time such as statutory holidays. Resource Calendars will be utilized as needed to over-ride the enterprise calendar on a resource-by-resource basis. Therefore, there are two specific actions for maintaining calendars in Sensei IQ.

- 1. Create and maintain Enterprise Calendars
- 2. Create and maintain Resource Calendars

Create and maintain Enterprise Calendars

Resource Manager

Resources

1. CREATE AND MAINTAIN ENTERPRISE CALENDARS

- a. Ensure you are in the **Resources area**, click **Enterprise Calendars** in the **Resources** section.
- b. Click + New from the command bar to create a new enterprise calendar or select and edit an existing calendar to make changes to an existing enterprise calendar.

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=	← 🖾 Sh 🕒 + New 🗎 Delete	~
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an Insights	Default Calendar	
Resources	Part-Time Work Calendar	
Enterprise Calendars	A	
🖄 Resource Demand	-	
Availability Heatmap		
Timesheet Approvals		
Knowledge		
Training		
What's New		
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Resources	3 61 3	

- c. Ensure the **calendar's name** clearly **defines the working time** defined by the calendar.
- d. Toggle on/off the typical working days for a week.
- e. Define the number of working hours per day.





f. Click **Save** to update or create the enterprise calendar

2. CREATE OR UPDATE CALENDAR EXCEPTIONS

- a. Ensure you are in the **calendar** in which you want to define **calendar exceptions**.
- b. Click the Exceptions tab.

Australia Standa Enterprise Calendar B Exception	ard Mon-Fri 40 hour work week - Save	d
🗊 Today \uparrow	\downarrow January 2022 \vee 🛅 Month \vee	
Sunday	Monday	Tuesday
Dec 26	27	28
2	3 ⊞ New Year's Day ─────	4

c. Click + New Calendar Exception from the command bar to create a new enterprise calendar exception, or select an existing calendar exception and then More details to make changes to an existing enterprise calendar exception, or Delete to remove it.

				C + New Calendar Excepti
ry 2022 \vee 🛗 Month 🗸				
Monday	Tuesday	Wednesday	Thursday	Friday
27	28	29	30	31
	🗄 New Year's Day			
O Monday, January 3, 2022 12:00 AM - 12:00 AM				
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10	C 🕕 More Details 📋	Delete	13	14

d. Give the calendar exception a meaningful name.



Job Aid

e. Define the **From and To Dates** for the exception.



Create and maintain Resource Calendars

Resource Manager



1. CREATE AND MAINTAIN RESOURCE CALENDARS

- 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 create a **calendar exception**.

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Reso	ources B	Albert Connell			
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5	Timesheet Approvals	DBA			
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0	Training	Deirdre Rogusky			
	What's New	Developer			
		Engineer			
		Evon Tech			
		External contractors			
		Francis Luzuriaga			
		HR			
		Jason Huebner			
		Kenneth Steiness			
		Marketing			
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R	Resources	- 31 of 31			

- c. Ensure you are editing the correct Resource and are on the Calendar Exceptions tab.
- d. Click an **existing Calendar Exception** and then **More Details** to update it or **Delete** to remove it; or click **New Calendar Exception** to create a new one.



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Calendar Exceptions (Bookable R	lesource)			D	+ New Calendar Excepti
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Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
Dec 26	27	28	29	30	31
2	3	4	5	6	7
		🗄 Flex day off			
9		 January 10, 2022 8:00 PM - 8: 	00 PM	12	14
	E Flex day off	Flex day off		15	14
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16	17 D	🕕 More Details 📋 Delete		20	21

- e. Give the calendar exception a meaningful name.
- f. Define the **From and To Dates** for the exception.

C	Quick Create: Calendar Exception		
C	Details		
E	Name	*	
	From	*	
	То	*	