

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.

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☆ Home	Active Bookable Resources ~	
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A Pinned	Albert Concell	Future ly
Resources	Albert Connell	External
វវវើ Insights	Bill Tibbetts	Named
🛱 Resources	A rice Center	Named
Enterprise Calendars	Business Analyst	Generic
🖧 Resource Demand	Contractor	Generic
Availability Heatmap	DBA	Generic
Timesheet Approvals	DBA	Generic
Knowledge	Deb Thomsen	Named
⑦ Training	Deirdre Rogusky	Named
What's New	Developer	Generic
	Engineer	Generic
	Evon Tech	Named
	External contractors	External
	Francis Luzuriaga	Named
	HR	Generic
	Jason Huebner	Named
	Kenneth Steiness	Named
	Marketing	Generic
	All # A B C D E	F G
R Resources	A 31 of 31	

- 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.

Job Aid |

Creating and maintaining Enterprise Resources

ew Bookable Resource				
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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 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 No	
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**.



- j. Other fields not explicitly referenced in this job aide should be completed based on organizational 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**.

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	2	What's New	Developer
			Engineer
			Evon Tech
			External contractors
			Francis Luzuriaga
			HR
			Jason Huebner
			Kenneth Steiness
			Marketing
			A B C D E
	R	Resources	of 31 (3 selected)

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

Parourse Tupe*	Line Manager
	Look for Line Manager
User	Required to complete timesheet*
Name*	Timesheet Manager
Department	Location
Primary Role	Time Zone
Related Resource	Start Date
	End Date
Enterprise Calendar	
Target Utilization	

Create and maintain Resource rates

Resource Manager

Job Aid

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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.

Albert Connell - Saved Bookable Resource General Calendar Exc C Rates Nocation Related	
Cost Rates Cost Rates	► Here Resources Cost Ra C Refresh of Row × :
✓ Effective Date ↑ ✓	Rate V
2021-09-06	\$75.00
2021-12-01	\$85.00
Sell Rates	
	D + New Resource Sell Rate ○ Refresh 🖉 Flow ∨ :
Effective Date 1	Rate V
2021-09-06	\$90.00
2021-12-01	\$125.00
2022-06-01	\$150.00



Job Aid

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**.

2021 Employee Satisfaction Survey - Saved Project · Information ~				
Major Project Active for 45 days	<	Planning (45 D)		
Details Key Dates	Tasks	Financials		



- 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.

ect \cdot Resources \vee				Project Manager Status	Portfolio Program
e for 45 days	Planning (45 D)		Execution	Closing	
Override Sell Rates	ormation Tracking Strategy				
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✓ Bookable Resource ↑ ∨		Effective Date † 🗸		Rate 🗸	
Albert Connell		2021-11-17			\$58.00
Albert Connell		2022-02-07			\$125.00
Albert Connell		2022-06-01			\$150.00

- 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		
F	Bookable Resource		
G	Effective Date	Ē	
	Rate		