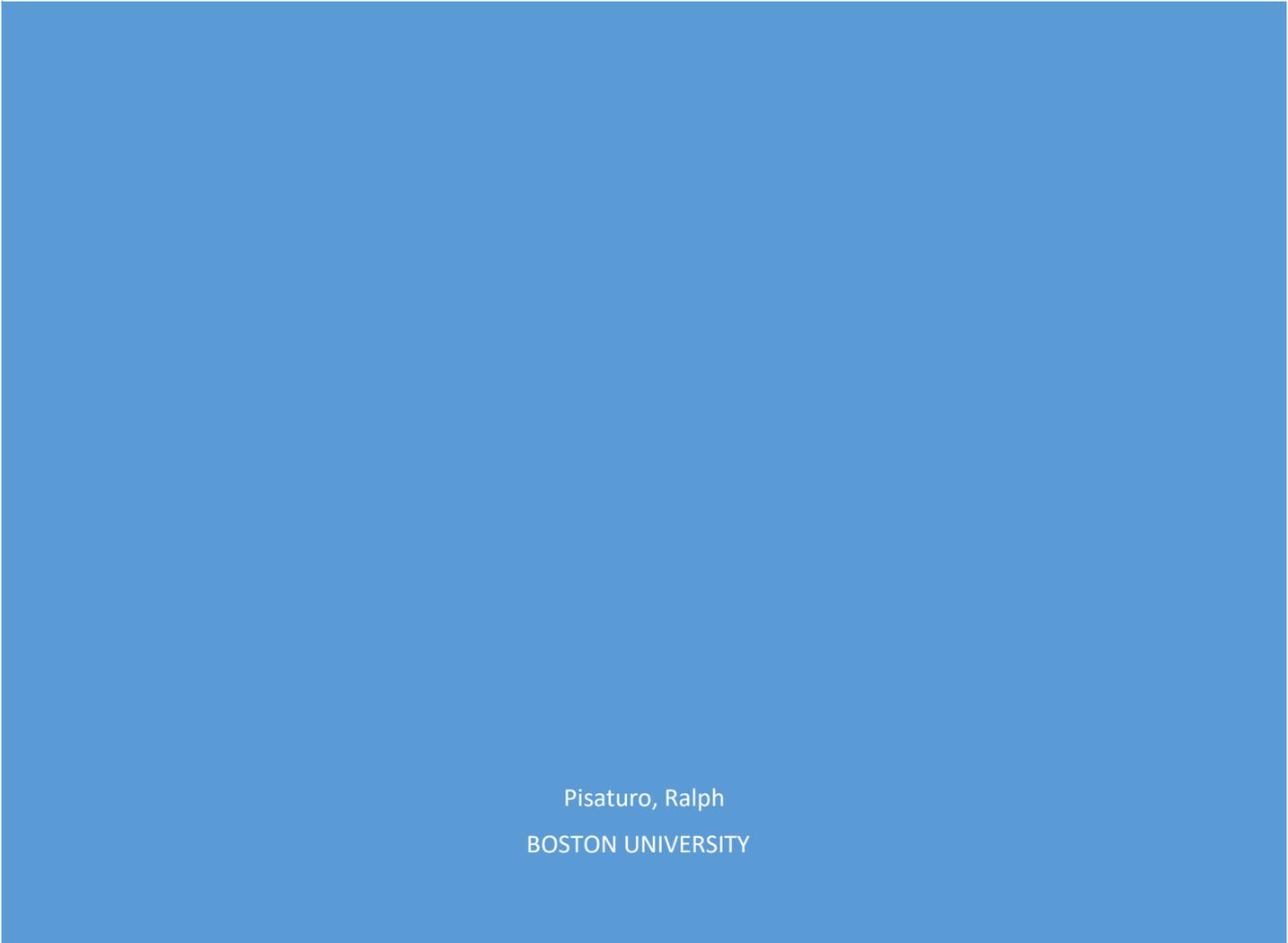




SERVICENOW RESOURCE REQUEST PROCESS USER GUIDE

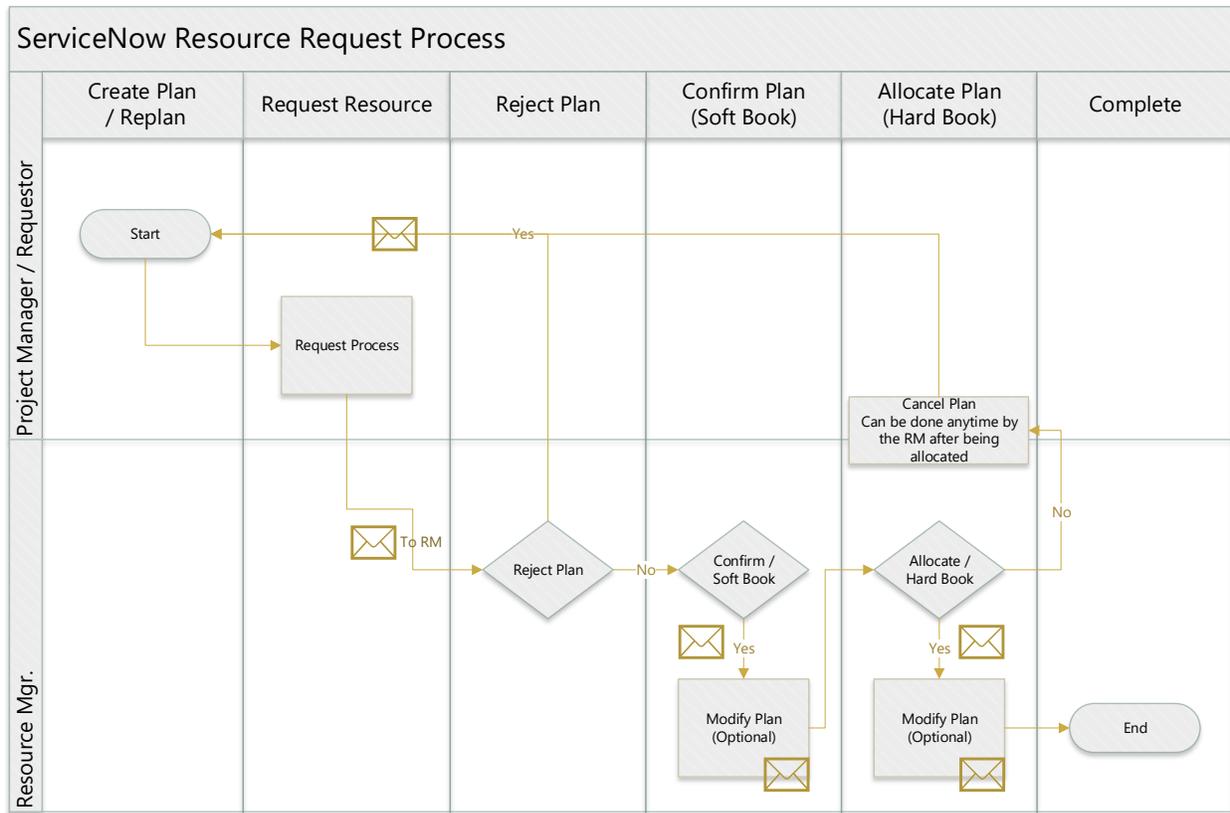


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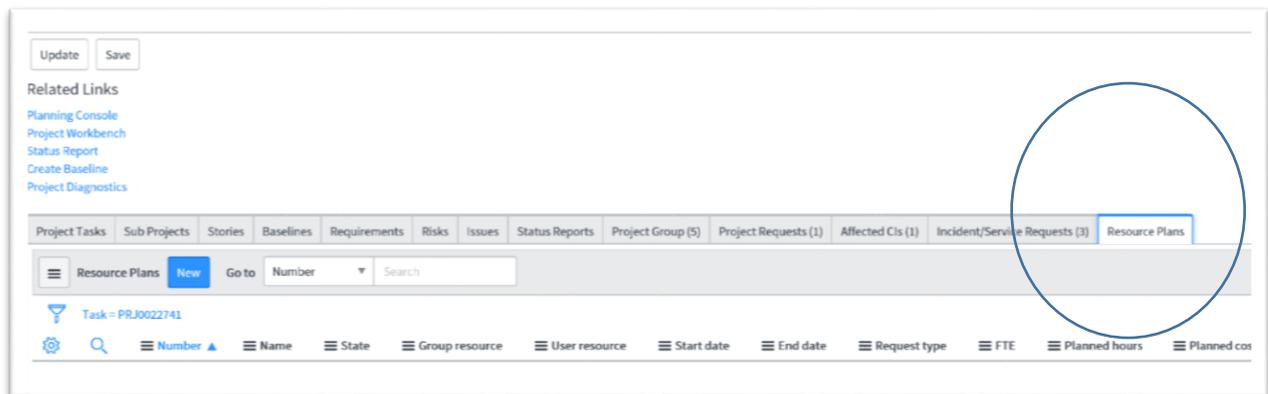
Resource Request Process Flow



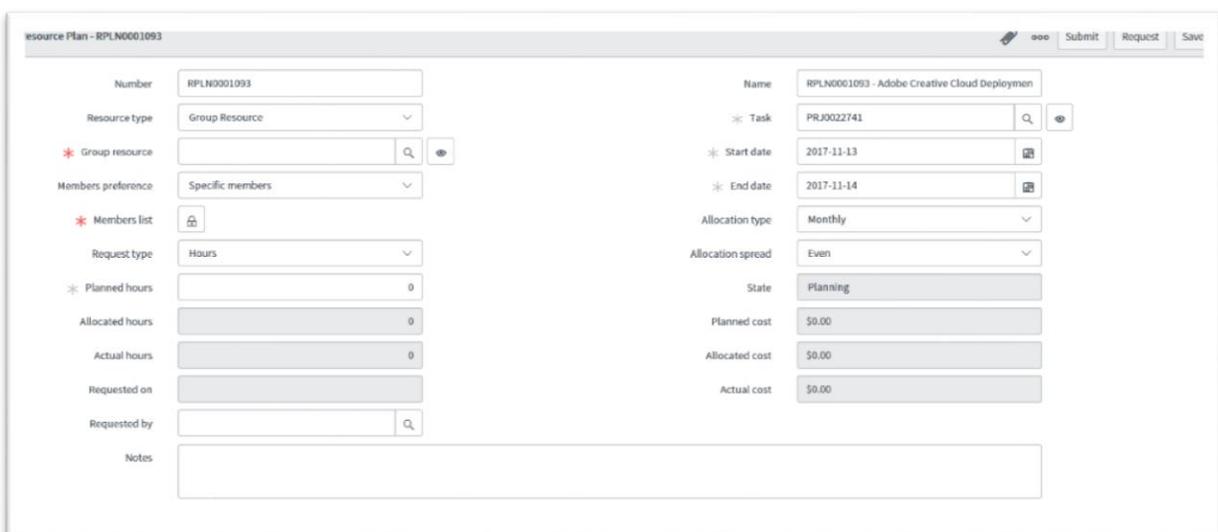
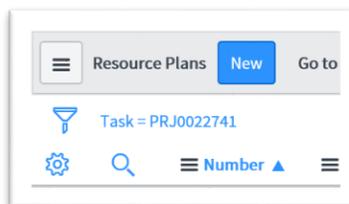
How to create a resource request, or plan - Role Project Manager

Requests should be per Role and per date period.

1. Go to the home form of the project for which you want to create the request.
2. Scroll down to the related lists at the bottom of the form and select the “Resource Plan” related list.



3. Click “New” to create a new resource plan



The screenshot shows the 'Resource Plan - RPLN0001093' form. The form is divided into two columns. The left column contains fields for: 'Number' (RPLN0001093), 'Resource type' (Group Resource), 'Group resource' (with a search icon), 'Members preference' (Specific members), 'Members list' (with a plus icon), 'Request type' (Hours), 'Planned hours' (0), 'Allocated hours' (0), 'Actual hours' (0), 'Requested on' (empty), and 'Requested by' (with a search icon). The right column contains fields for: 'Name' (RPLN0001093 - Adobe Creative Cloud Deployment), 'Task' (PRJ0022741), 'Start date' (2017-11-13), 'End date' (2017-11-14), 'Allocation type' (Monthly), 'Allocation spread' (Even), 'State' (Planning), 'Planned cost' (\$0.00), 'Allocated cost' (\$0.00), and 'Actual cost' (\$0.00). At the bottom is a 'Notes' field.

4. Enter the "Resource Plan" information.

The image shows a form for entering resource plan information. The form fields and their values are as follows:

Number	RPLN0001093
Resource type	Group Resource
* Group resource	Web & Mobile Apps
Members preference	Any member
Role	Developer
Request type	Hours
* Planned hours	100
Allocated hours	0
Actual hours	0
Requested on	
Requested by	Ryan Cornelius
Notes	

Callout boxes provide instructions for several fields:

- Resource type:** Select "Group Resource" as the "Resource Type"
- Group resource:** Enter the Resource Group
- Members preference:** Select "Any Member"
- Role:** Select the Role the resource will fulfill on the project
- Request type:** Select Hours or FTE, whichever you prefer. The system will calculate one to the other for you.
- Planned hours:** If you selected hours, enter the number of hours that you will need the resource for the date period. If you selected FTE enter the percent FTE needed. 1 = 100%, 0.5 – 50%, etc.
- Requested by:** Enter the name of the individual that should receive notifications. The default is you.
- Notes:** Enter any relevant notes such as required skills, etc.

Note that you can request more than one resource in the same role for the same time period.

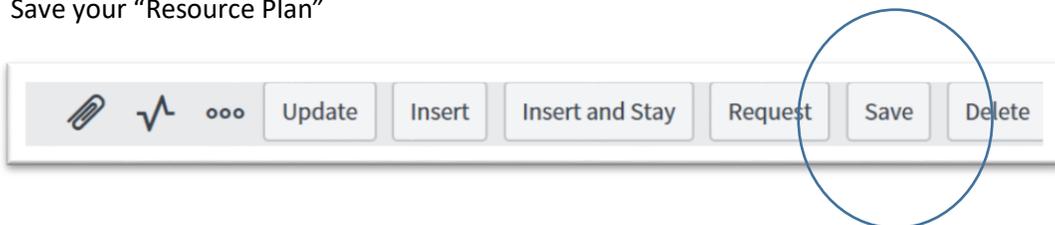
The screenshot shows a form for creating a resource plan. The fields are as follows:

- Name:** RPLN0001093 - Adobe Creative Cloud Deploymen
- * Task:** PRJ0022741
- * Start date:** 2018-04-01
- * End date:** 2018-07-31
- Allocation type:** Monthly
- Allocation spread:** Even

Callout boxes provide the following instructions:

- Top right:** The default name will be "Plan#, Project Name, Role". You can change it but do so after you enter the role and save or the system will revert to the default name.
- Task field:** Keep the default task as this will ensure the resource plan remains tied to the project.
- Start/End dates:** The start and end dates will default to the start and end dates of the project. Change them as needed to reflect when the resource is required.
- Allocation type:** Selecting monthly will allow you to adjust your request/ plan on a monthly basis. Select weekly if you need to adjust your plan on a weekly basis.
- Allocation spread:** Select an "Even" "Allocation Spread". This will evenly spread your hours or FTE across all months.

5. Save your "Resource Plan"



Upon saving your Resource Plan, monthly or weekly requested allocations will be calculated and appear at the bottom on the Resource Plan. You should now review your allocation requests.

Start date	End date	Person Days	FTE	Requested hours	Requested cost
2018-07-01	2018-07-31	3.13	0.15	25	\$1,875.00
2018-06-01	2018-06-30	3.13	0.15	25	\$1,875.00
2018-05-01	2018-05-31	3.25	0.15	26	\$1,950.00
2018-04-01	2018-04-30	3	0.15	24	\$1,800.00
Sum				100	\$7,500.00

6. You can adjust your plan by clicking in either the Hour or FTE cell for the month that you want to change and enter a new value. In the case below the resource is only needed for 10 hours in the first month. The FTE will be calculated if you enter hours. Note that the system will not rebalance your totals. If you edit the row detail of your request it will affect the overall request.

Caution – if you change the requested dates, FTE / Hours, or allocation type (weekly / monthly) in the top form your allocation adjustments will revert back to an even spread.

FTE	Requested hours	Requested cost
0.15	<input type="text" value="10"/>	
0.15		25
0.15		26

FTE	Requested hours	Requested cost
0.06	10	
0.15		25
0.15		26
0.15		24
Sum	85	Sum

7. After you are happy with your resource allocation requests click “Request”. An email will be sent to the resource manager of the group indicating that there is a new Resource Plan to be addressed.

How to Change a Resource Plan After it has Been Requested –Role Project Manager

Making small changes

If you want to make a “small” change to your resource plan, such as changing one or two months up or down simply add a note to the resource plan requesting that the Resource Manager adjust the plan. This will send an email notification to the RM with the content of your note.

Notes

Please increase the development resource in May by 25% and decrease the developer allocation in June by 20%. We have the opportunity to complete the project early if the developer is available at the higher level in May.

It’s always a good idea to follow up your note with a brief conversation with the Resource Manager.

Increasing overall Resource Request

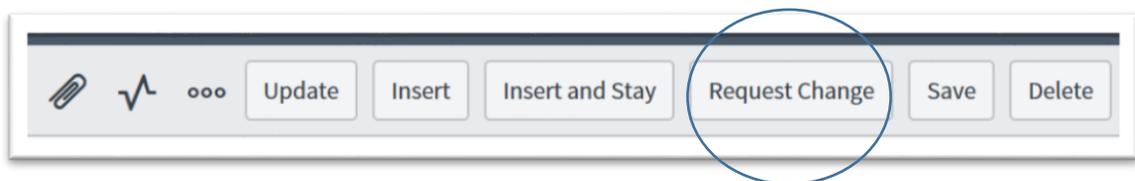
If you need to increase your requested allocations across the board, or extend the date the resource will be needed. It is best to leave the current resource plan as it is and create a new plan requesting the incremental resource increase. See below for how to copy a resource plan.

Re-planning Resource Plan

The resource manager can make changes to the plan and allocations on the project manager’s behalf. If you prefer to, or need to re work the entire plan the approach will be different based on the state of the plan, see below.

Make a change prior to the request being allocated

Prior to the Resource Plan being allocated, that is in a “Requested” or “Confirmed” state, click “Request Change” in the top right-hand menu. This will require you to rework any manual updates made in the detail.

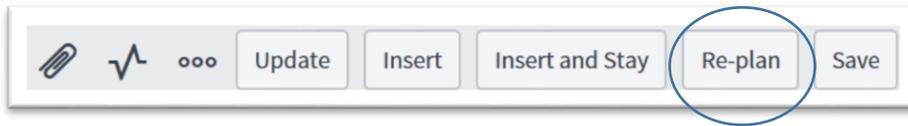


This will move the plan back to the “Planning” stage. You can then make adjustments to the plan and then re-request the plan to the resource manager.

If you do not see this button you have the Resource Manager role in ServiceNow. In this case you can simply change the requested allocations or plan detail, but do so in cooperation with the resource manager of the group.

Make a change after the request has been allocated, and before the start date

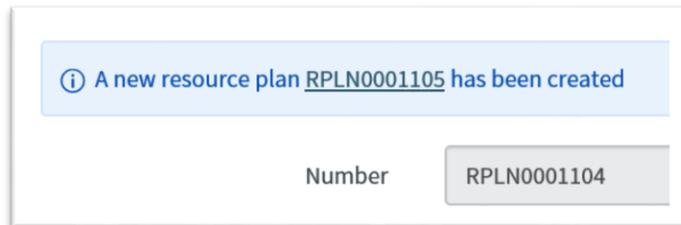
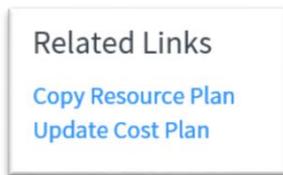
If the resource plan has been allocated and the start date is in the future you can ask the Resource Manager to cancel the plan. Once the resource manager cancels the plan the plan will be in a canceled state. The PM should then select “Re-plan” in the top right-hand menu.



This will move the plan back to the “Planning” stage. You can then make adjustments to the plan and then resubmit the plan to the resource manager.

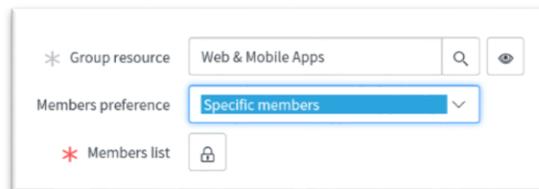
Make a change after the request has been allocated, and after the start date

After the start date of the plan is in the past you will need to ask the Resource Manager to cancel the plan. Once the resource manager cancels the plan the plan will be in a canceled state. You can then make a copy of the plan by clicking the “Copy Resource Plan” under the related links. Then go to the copied plan via the link that will appear at the top of the canceled resource plan

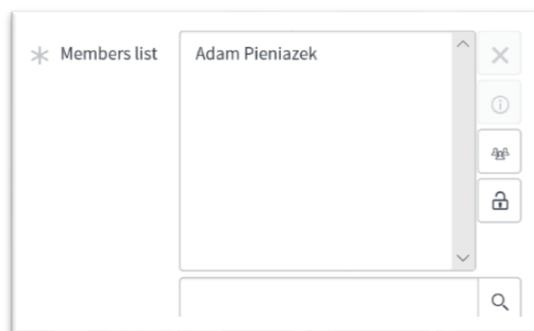


Soft Booking or Confirming a Resource Plan – Role Resource Manager

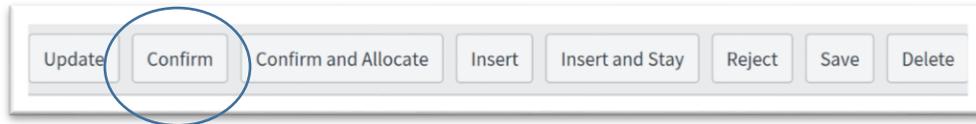
1. To confirm or soft book a resource plan change the Members Preference to “Specific Members”



2. Select the resource or resources that will be fulfilling the request. If you select more than one resource the hours / FTE will be spread evenly between the resources.

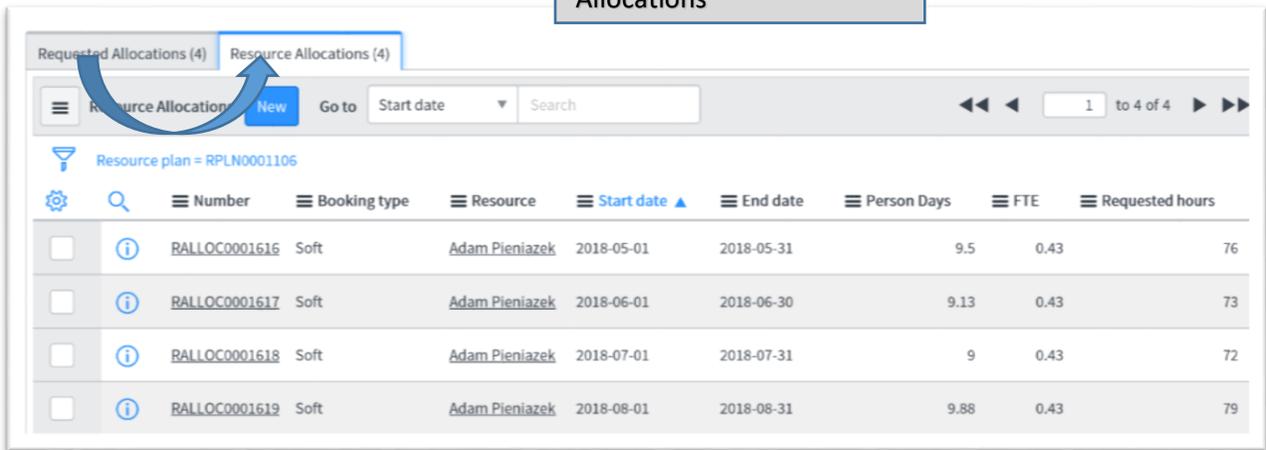


3. Click “Confirm”



4. Upon clicking “Confirm” the system will create a “Resource Allocation” for each “Resource Request”, one per month if “Allocation Type” is set to monthly, one per week if “Allocation Type” is set to weekly.

Requested Allocations are transferred to Resource Allocations



	Number	Booking type	Resource	Start date	End date	Person Days	FTE	Requested hours
<input type="checkbox"/>	RALLOC0001616	Soft	Adam Pieniasek	2018-05-01	2018-05-31	9.5	0.43	76
<input type="checkbox"/>	RALLOC0001617	Soft	Adam Pieniasek	2018-06-01	2018-06-30	9.13	0.43	73
<input type="checkbox"/>	RALLOC0001618	Soft	Adam Pieniasek	2018-07-01	2018-07-31	9	0.43	72
<input type="checkbox"/>	RALLOC0001619	Soft	Adam Pieniasek	2018-08-01	2018-08-31	9.88	0.43	79

5. You can adjust your plan by clicking in either the Hour or FTE cell for the month that you want to change and enter a new value. In the case below the resource is only available for 40 hours in the second month due to a planned vacation.
- a. Note the FTE will be calculated if you enter hours and hours will be calculated if you enter FTE
 - b. Note that the system will not rebalance your totals. If you edit the row detail of your request it will affect the overall request.

Caution – if you change the requested dates, FTE / Hours, or allocation type (weekly / monthly) in the top form your allocation adjustments will revert back to an even spread.

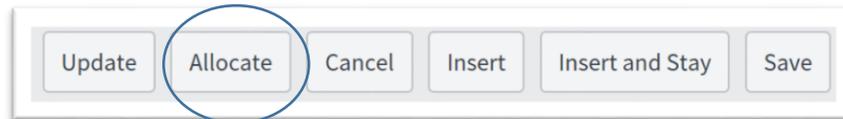
Person Days	FTE	Requested hours
9.5	0.43	76
40		
9	0.43	72
9.88	0.43	79

FTE	Requested hours
0.43	76
0.43	40
0.43	72
0.43	79

If you do adjust the allocations it is recommended that you enter a note into the notes field to inform the Project Manager of the changes. Upon clicking Save or Update a notification will be sent to the Project Manager with the contents of your note.

Hard Booking or Allocating a Resource Plan – Role Resource Manager

1. Click “Allocate”



This will change your Resource Allocation to a “Hard” “Booking Type”

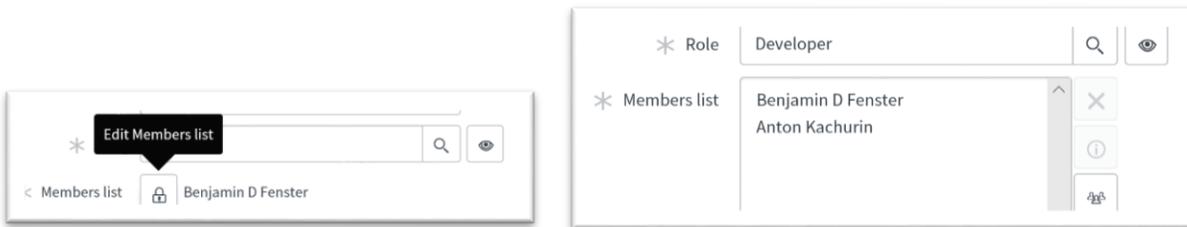
Requested Allocations (4)		Resource Allocations (4)	
	Resource Allocations	New	Go to Start date
	Resource plan = RPLN0001106		
	Number	Booking type	Ri
<input type="checkbox"/>	RALLOC0001762	Hard	Adan
<input type="checkbox"/>	RALLOC0001763	Hard	Adan
<input type="checkbox"/>	RALLOC0001764	Hard	Adan
<input type="checkbox"/>	RALLOC0001765	Hard	Adan

Adjusting Allocations – Role Resource Manager

Adding an Additional Resource to the Plan

The resource manager can add a resource to the plan. For example if you want to split the work between resources you have that ability. Assuming that the plan has been confirmed and you determine that you no longer have a single resource that can fulfill the request. To add a resource to the plan...

1. Click on the Member list icon and add a second developer.



This will reset the plan to the requested state. At this point you can simply confirm the plan again. This will evenly split the requested allocations between the two resources.

	Number	Booking type	Resource	Start date	End date	FTE	Requested hours	Allocated hours
<input type="checkbox"/>	BALLOC0001770	Soft	Benjamin D Fenster	2018-05-01	2018-05-31	0.24	45	
<input type="checkbox"/>	BALLOC0001774	Soft	Anton Kachurin	2018-05-01	2018-05-31	0.24	43	
<input type="checkbox"/>	BALLOC0001775	Soft	Anton Kachurin	2018-06-01	2018-06-30	0.5	84	
<input type="checkbox"/>	BALLOC0001771	Soft	Benjamin D Fenster	2018-06-01	2018-06-30	0.5	84	
<input type="checkbox"/>	BALLOC0001772	Soft	Benjamin D Fenster	2018-07-01	2018-07-31	0.5	84	
<input type="checkbox"/>	BALLOC0001776	Soft	Anton Kachurin	2018-07-01	2018-07-31	0.5	84	
<input type="checkbox"/>	BALLOC0001773	Soft	Benjamin D Fenster	2018-08-01	2018-08-31	0.5	92	
<input type="checkbox"/>	BALLOC0001777	Soft	Anton Kachurin	2018-08-01	2018-08-31	0.5	92	

Adjusting Monthly or Weekly Allocations

Assuming you want to further adjust the resource plan you can do so by adjusting at the individual allocation level, either monthly or weekly depending on what "Allocation Type" the Project Manager selected. In this case say that you don't want to split the work between two resources during the first month of the project because the PM only requested .5 of a resource during the first month. To make this change...

- Click into the requested hours and add the number of hours to “Requested Hours” so that all hours are allocated to the resource who will work on the project in month 1.

	Number	Booking type	Resource	Start date	End date	FTE	Requested hours	Allocated hours
<input type="checkbox"/>	RALLOC0001770	Soft	Benjamin D Fenster	2018-05-01	2018-05-31	0.24	88	88
<input type="checkbox"/>	RALLOC0001774	Soft	Anton Kachurin	2018-05-01	2018-05-31	0.24	43	43

- You can then subtract those hours from the second resource

	Number	Booking type	Resource	Start date	End date	FTE	Requested hours	Allocated hours
<input type="checkbox"/>	RALLOC0001770	Soft	Benjamin D Fenster	2018-05-01	2018-05-31	0.24	88	88
<input type="checkbox"/>	RALLOC0001774	Soft	Anton Kachurin	2018-05-01	2018-05-31	0.24	43	43

Note that you cannot adjust an allocation once the allocation start date is in the past. However, if you want to adjust the balance of a month once the month has begun you can drill down to the daily allocation level and adjust the allocation for the future days in the month. To do this...

Adjusting Daily Allocations

- Click on the Allocation number

	Number	Booking type	Resource	Start date	End date	FTE	Requested hours	Allocated hours
<input type="checkbox"/>	RALLOC0001783	Hard	Anton Kachurin	2018-04-01	2018-04-30	0.49	78	78

- You can then click on the any individual daily allocation and make a change

	Activity	Start date	Requested hours	Allocated hours
<input type="checkbox"/>	Cashier System Replacement	2018-04-19	4	4
<input type="checkbox"/>	Cashier System Replacement	2018-04-20	8	8
<input type="checkbox"/>	Cashier System Replacement	2018-04-23	4	4
<input type="checkbox"/>	Cashier System Replacement	2018-04-24	4	4
<input type="checkbox"/>	Cashier System Replacement	2018-04-25	4	4
<input type="checkbox"/>	Cashier System Replacement	2018-04-26	4	4
<input type="checkbox"/>	Cashier System Replacement	2018-04-27	3	3
<input type="checkbox"/>	Cashier System Replacement	2018-04-30	3	3

To change a series of allocations click on the cell you would like to change, hold down the control key and then click on the same cell in the other allocations you would like to change. This will highlight all the cells you want to change. Then release the control key, click into any of the cells you want to change. Changing this one cell will update all highlighted cells.

 Cashier System Replacement	2018-04-19		4
 Cashier System Replacement	2018-04-20	<input type="text" value="8"/>  	
 Cashier System Replacement	2018-04-23	7 rows will be updated	
 Cashier System Replacement	2018-04-24		4
 Cashier System Replacement	2018-04-25		4
 Cashier System Replacement	2018-04-26		4
 Cashier System Replacement	2018-04-27		3
 Cashier System Replacement	2018-04-30		3