Project and Portfolio Management

Process Guide

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Innovation Management

Introduction

The Innovation Management application consists of tools storing and organizing ideas and allows users to vote on ideas. For larger organizations, you can configure different portal pages with unique sets of categories, for example, for HR, IT, and Support.

The Idea Portal is the central location to collect, curate, and promote ideas into demand, project, epic, or story. It enables seamless integration of key feedback and requests into the product planning and development process.

The concepts described in this guide are to be used as a baseline for successful Innovation Management (IM) within the ServiceNow Project Portfolio Management product. This guide does not contain a specific set of instructions for every IM scenario; rather it seeks to define a procedural mechanism which organizations can utilize as a starting point for the refinement of their own resource management process. This guide is aligned with out of the box (OOTB) functionality

Overview

An idea is a categorized but otherwise fairly unstructured formalization of an idea an employee has that refers to potential changes or improvements in the organization.

A user can create ideas through the Idea Portal and collaborate on ideas of others. An Idea Manager (or the Demand Manager) reviews ideas and decides on how to proceed with them (either through the Demand Process, PPM or the Agile module).

Process Description

The Innovation Management application enables you to gather and evaluate ideas efficiently, and to quickly identify and process the ideas with the greatest potential for implementation.

Process Goal

The primary goal of the Innovation Management process is to centrally capture all ideas for purposes of categorization, evaluation, collaboration and prioritization based on the needs of the organization.

Process Objectives

The objectives of the Innovation Management process are to:

- Capture, centralize and collaborate on ideas

- Ensure the platform will provide a single-entry point for ideas of all kinds

- Categorized, reviewed and prioritized ideas are planned and executed on in a consistent manner to ensure business objectives are met

- Ensure that employees have full visibility in their own and others' ideas and can track the progress being made on them, maximizing employee engagement in the process

Relationship with other Processes

	Relation Description	Input	Output
Demand Management	• Ideas can trigger the creation of a Demand		X
Continual Improvement Management	• Ideas can trigger the creation of an Improvement Initiative		X
Project Management	• Ideas can trigger the creation of a Project		X
Agile	• Ideas can trigger the creation of an Agile Story		X
SAFe	• Ideas can trigger the creation of a SAFe Story		X

Principles and Basic Concepts

Idea states

Ideas are tracked throughout their lifecycle to support proper handling and reporting. The state of an idea indicates where it is in relation to the lifecycle and helps determine what the next step in the process might be. It is also used in the evaluation of the idea in case it is not considered for implementation. It can only be adjusted by the Idea Manager.

Under Review: More information is required before the idea is promoted and prioritized for development.

Need more information: Accepted but put on hold for possible development in the future.

Submitted: Pending review from the idea or demand manager.

In Backlog: Accepted, and a project, demand, epic, feature, or story is created from the idea for current implementation.

Completed: Work on the idea has been completed.

Planned: Work has started on the task created from the idea.

In Development: Does not meet requirements, is not feasible, or Is not popular. The idea becomes inactive and closed for comments and votes.

Unlikely to implement: A similar idea exists in the database. The duplicate idea becomes associated with the original idea and is inactive and closed for comments and votes.

Duplicate: Already developed at the time of idea submission or is close to being developed.

Already exists: Already developed at the time of idea submission or is close to being developed.

Process Roles

Each role is assigned to perform specific tasks within the process. Within the process, there can be more than one individual associated with a specific role. Additionally, a single individual can assume more than one role within the process, though typically not at the same time. Depending on the structure and maturity of a process, all roles described may not exist in every organization.

Role	Description
Process Owner	A senior manager with the ability and authority to ensure the process is rolled out and used by the entire IT organization. Responsible for: • Defining the overall mission of the process. • Establishing and communicating the process mission, goals, and objectives to all stakeholders. • Resolving any cross-functional (departmental) issues. • Ensuring consistent execution of the process across the organization. • Reporting on the effectiveness of the process to senior management. • Initiating any process improvement initiatives.
Idea Manager	Responsible for: • Managing the day-to-day activities of the process. • Driving the efficiency and effectiveness of the Innovation Management process. • Gathering and reporting on process metrics. • Delegating work using demand tasks
Business User/Requester	Responsible for: • Identifying need, problem or opportunity and capturing them as ideas • Collaborating and voting on other's people's ideas
Implementation Team	Responsible for: • Implementing the idea (depending on the type of idea, either in a project, story or other work item).

RACI Matrix

Roles and responsibilities are assigned to specific process activities.

ID	Activities	Business User	Idea Manager	Implementation Team	ServiceNow
IDEA 1.0	Create Idea	R/A	C		
IDEA 2.0	Collaborate / Vote on Idea	R/A			
IDEA 3.0	Review Ideas	I/C	R/A		
IDEA 4.0	Create Backlog Item from Idea	I	R/A		
IDEA 5.0	Implement Idea	I/C	C		
IDEA 6.0	Mark Idea as Complete	I/C	R/A	C	

Innovation Management Activity Description

Innovation Management Process Overview
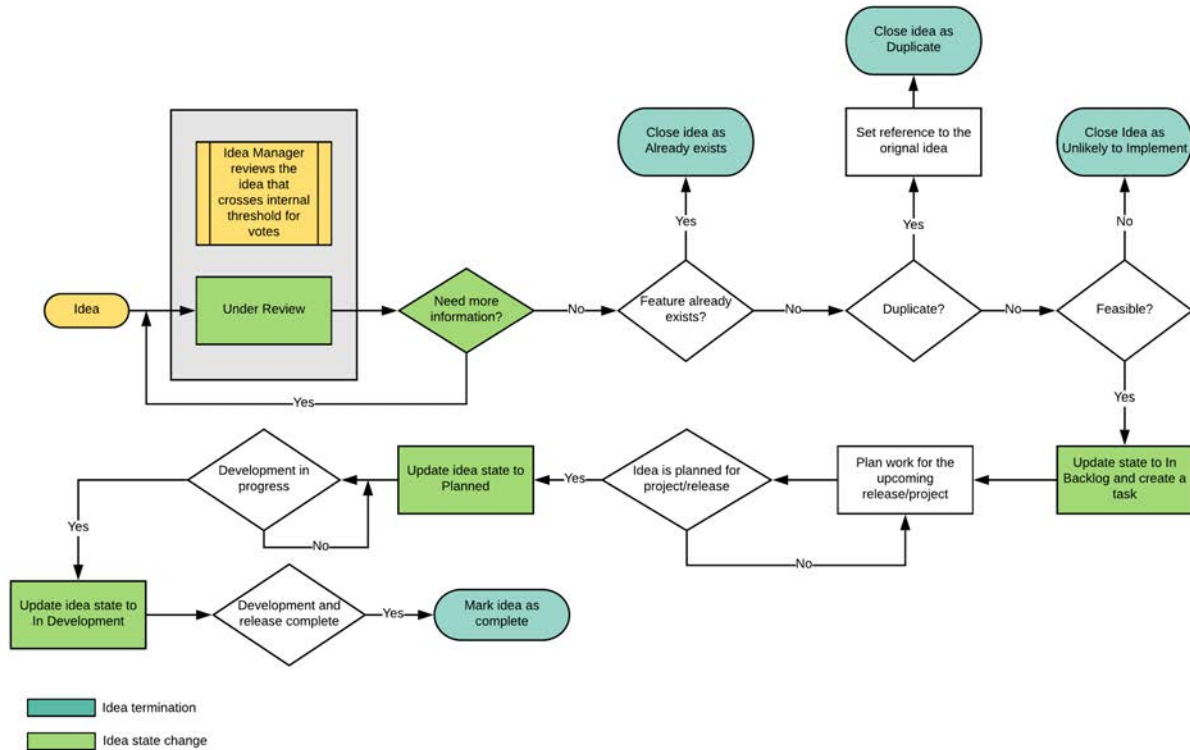
Demand Management

Introduction

The Demand Management application consists of tools for capturing, centralizing, and assessing strategic and operational demands. It also provides a single location for managing all the demand information.

The ideation module, integrated with Demand Management, provides an easy way for users to submit ideas and for demand managers to assess before promoting them to demands. Ideation also helps track the progress of an idea as it moves through the demand life cycle (idea to a demand, to a project, enhancement, change, or defect).

The demand workbench provides a central location for viewing and analyzing business demands. Demand users can access an interactive bubble chart as well as demand record information within the workbench to collaborate on-demand assessment. Demand managers can approve demands and create projects and enhancements.

The Demand Management process is used to capture, understand and influence enterprise demand for services/capabilities/functionality and consequently aggregate and prioritize those demands. A properly functioning demand management capability will reduce risk and optimize resource utilization. Furthermore, when aligned with IT and business strategy through the governance team it will help to focus resources on those high priority IT and business needs through more accurate incoming information. It will drive greater discipline in the organization by developing realistic project/work proposals that capture the data needed to enable better business decisions.

This document also describes how the ServiceNow platform, via the Demand Application and its interfaces to other applications, supports the demand management process with its abilities to capture, understand and influence enterprise demand for services/capabilities/functionality.

Overview

A Demand is a request for a new product or service, or a change to an existing product or service, which will require the expenditure of resources to be delivered. Demands typically compete for resources and must be evaluated and prioritized relative to the business value they will provide.

A user can create a Demand through the Service Catalog or submit an Idea which would then get converted to a Demand. The purpose of creating an Idea in the Service Catalog is to funnel requests that could potentially become a Demand, it serves as a low barrier of entry point. This enables the organization to evaluate, plan and prioritize demands that deliver maximum business value.

Note: Not all Ideas become Demands. Ideas can be closed, if they will not be pursued, or alternatively, a project, epic, initiative, or story can be created from the Idea.

Process Description

ServiceNow Demand Management enables you to consolidate strategic and operational requests from the business and automate the steps in the investment decision process. In

addition, it provides the ability to monitor and manage progress of each request throughout the decision and delivery processes.

Process Goal

The primary goal of the demand management process is to centrally capture all strategic and operational demand requests for purposes of evaluation, comparison, prioritization and approval or denial based on the needs of the organization.

Process Objectives

The objectives of the demand management process are to:

- Capture, centralize, and assess strategic and operational demands.
- Ensure the platform will provide a single-entry point for demand requests to avoid "side projects" or assignment of resources to initiatives that do not comply with stated IT or business strategies.
- All prioritized, categorized, and approved demand requests will be scheduled and fulfilled in a consistent manner to ensure business objectives are met
- Ensure that Managers have full visibility of the demand for their resources, to provide optimal use of their resources for value generation, maximizing the resources available and minimizing unused resources and their cost of ownership

Relationship with Other Processes

Process	Relation Description	Input	Output
Project Management	When Large Demands are Approved, they will become Projects		X
Agile Development	When Defects or Enhancements Request are moved forward from demand, they may be created as items in the Agile Development application		X
Change Management	Changes can be an output of the Demand Process		X
Resource Management	Resource Plans can be generated from a Demand	X	X
Financial Management	Cost & Benefit plans can be generated from a Demand	X	X
Incident Management	Incidents can generate demands if they are of sufficient size	X	
Problem	Problems can generate demands if they are of sufficient size	X	
Continual Improvement Management	Improvement Initiatives can be created from a Demand. Demands can be created from Improvement Initiatives	X	X
Investment Funding	Funding for Demands can be managed using the Investment Funding application		X

Principles and Basic Concepts

Policies

Demand management policies are required to guide all staff in the behaviors needed to make demand management effective. Policy statements will be very dependent on the culture of the organization.

- All demands must come through the Demand Management system
- Any user can submit "Ideas" for evaluation.
- Only Demand Managers can accept an Idea or Demand
- Any business user can submit /update Demands into the Demand Management System
- Assessment of Demands will be based on pre-defined criteria, and will vary based on the type of Demand

Demand States

Demand should be tracked throughout their lifecycle to support proper handling and reporting. The stage of a demand indicates where it is in relation to the lifecycle and helps determine what the next step in the process might be. The stage will be a read-only field, and the value will be changed based on decisions of the Demand User and Demand Manager.

State Description

Draft: The demand manager accepts a submitted idea, or a Business User creates a new Demand from the Service Catalogue. Business Users can add collaborators who can update the Demand. The demand manager, business user, or collaborator can take the following actions after reviewing or editing the record:

- Update: The demand record is updated, but the demand remains in the current state.
- Submit demand: The demand is moved to the submitted state.
- Delete: The demand record is deleted.

Submitted: An accepted idea creates a demand record and the demand manager submits the demand. Alternatively, a business user can submit a Demand. The business user or collaborator can update a demand till it is progressed to Screening state. The demand manager can take the following actions after reviewing or editing the record:

- Update: The demand record is updated, but the demand remains in the current state.
- Screen: The demand is moved to the screening state.
- Qualify: The demand is moved to the qualified state.
- Defer: The demand is moved to the deferred state.
- Incomplete: The demand is moved to the incomplete state.
- Delete: The demand record is deleted.

Screening: The demand manager initiates assessments for the demand. After reviewing or editing the record, click one of these buttons:

- Update: The demand record is updated, but the demand remains in the current state.
- Qualify: The demand is moved to the qualified state.
- Defer: The demand is moved to the deferred state.
- Delete: The demand record is deleted.

Qualified: The demand has been qualified and is ready for review. After reviewing the record, click one of these buttons:

- Update: The demand record is updated, but the demand remains in the current state.
- Approve: The demand is moved to the approved state.
- Defer: The demand is moved to the deferred state.
- Delete: The demand record is deleted.

Deferred: The demand has been put on hold. The demand can be revisited in future and reviewed. After reviewing the record, click one of these buttons:

- Update: The demand record is updated, but the demand remains in the current state.
- Approve: The demand is moved to the approved state.
- Reset to Draft: The demand is moved back to the draft state.
- Delete: The demand record is deleted.

Approved: The demand is approved. After reviewing or editing the record, click one of these buttons:

- Update: The demand record is updated, but the demand remains in the current state.
- Close: The demand is moved to the closed state.
- Delete: The demand record is deleted.

Completed: The demand is moved to the completed state.

Demand Tasks

Tasks for a demand can be created to delegate cost, effort, risk, and benefit assessment activities. You can assign a resource or group to the demand task to track the actual time and effort spent on performing the specified activities.

RIDAC

Management of risks, issues, decisions, actions and request changes within demands.

Process Roles

Each role is assigned to perform specific tasks within the process. Within the process, there can be more than one individual associated with a specific role. Additionally, a single individual can assume more than one role within the process, though typically not at the same time. Depending on the structure and maturity of a process, all roles described may not exist in every organization.

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Demand Manager	Responsible for: • Managing the day-to-day activities of the process. • Driving the efficiency and effectiveness of the Demand Management process. • Gathering and reporting on process metrics. • Delegating work using demand tasks
BRM (Business Relationship Manager)	Responsible for: • The Business Relationship Manager is responsible for maintaining a positive relationship with customers, identifying customer needs and ensuring that the service provider is able to meet these needs with an appropriate catalogue of services. • The Business Relationship Manager works closely with the Demand Manager.
IT Steering Group (ISG)	Responsible for: • The IT Steering Group (ISG) sets the direction and strategy for IT Services. It includes members of senior management from business and IT. • The ISG reviews the business and IT strategies in order to make sure that they are aligned. • It also sets priorities of service development programs/ projects.
Business User/Requester	Responsible for: • Identifying need, problem or opportunity • Obtaining appropriate commitment to proceed from an internal Sponsor; the Sponsor should have expressed his/her commitment to contribute the time and resources necessary to develop the project submission form

Collaborator	Responsible for: • Contributing to the demand by providing subject matter expertise
Stakeholder	Responsible for: • Individuals who are involved in the project or whose interests may be positively or negatively affected as a result of the project

RACI Matrix

Roles and responsibilities are assigned to specific process activities.

ID	Activities	Business User	Demand Manger	Stakeholders	ServiceNow
DMD 1.0	Create Idea/Demand				
DMD 1.1	Submit Idea	R	A		
DMD 1.2	Submit Defect Demand from an Incident	R	A		
DMD 1.3	Submit Enhancement Demand from a Change	R	A		
DMD 1.4	Submit Enhancement Demand from a Problem	R	A		
DMD 1.5	Submit Demand	R/A	R/A		
DMD 1.6	Promote Idea to Demand	I	R/A		
DMD 2.0	Enhance & Assess Demand				
DMD 2.1	Assist Completion of Demand	C	R/A	C	
DMD 2.2	Add T-Shirt Size, Impact, Business Drivers, and High-Level Timing	C	R/A		
DMD 2.3	Add Resource Plans to Demand	C	R/A	C	
DMD 2.4	Add Cost & Benefit Plans to Demand	C	R/A	C	
DMD 2.5	Update Portfolio, Stakeholders & Requirements	C	R/A	I	
DMD 2.6	Move Demand to Screening	I	R/A	I	
DMD 2.7	Complete Assessments	I	I	R/A	
DMD 2.8	Move Demand to Qualified (Auto)	I	I	I	R/A
DMD 2.9	Move Demand to Qualified (Manual)	I	R/A	I	
DMD 3.0	Approve Demand				
DMD 3.1	Review Demands	C	A	R	

DMD 3.2	Defer Demand	I	A	R	
DMD 3.3	Set Demand to Approved	I	R/A	I	
DMD 3.4	Create Project, Enhancement, Defect or Change	I	R/A	I	
DMD 3.5	Generate Project, Enhancement, Defect or Change record	I	I	I	R/A
DMD 3.6	Set Demand to Complete	I	I	I	R/A
R: Responsible, A: Accountable C: Consulted, I: Informed					

Demand Management Activity Description
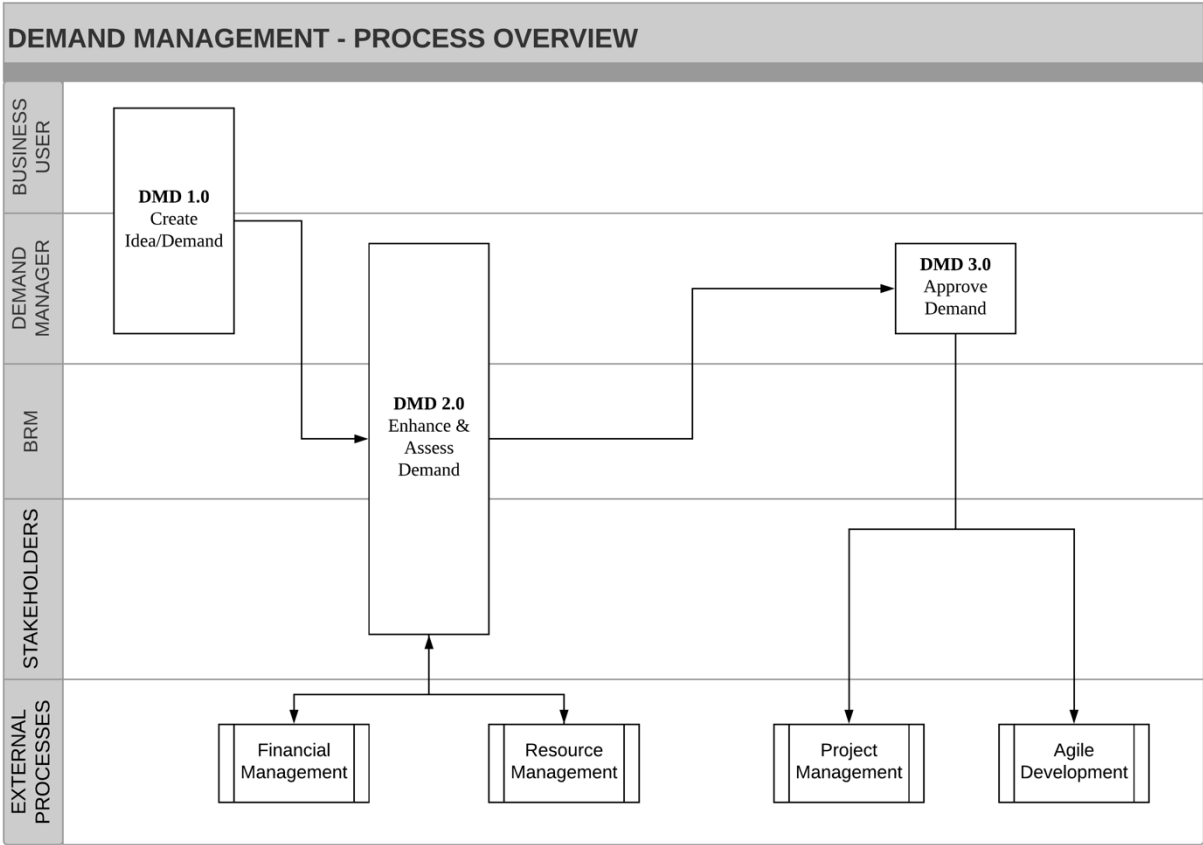
Demand Management Process Overview

Figure 1. Process Overview

| ID	Tasks	Demand Stages	Description
DMD 1.0	Create Demand	Draft. Submitted	• Business Users can submit an Idea via the Service Catalog. Ideas submitted are evaluated and promoted to a Demand by the Demand Manager. • Business Users can bypass Ideation and submit a Demand via the Service Catalog. • Demand Managers can submit demands.
DMD 2.0	Enhance Demand	Screening. Qualified	• Demand Manager populates additional information in the Demand with support of Requestor and relevant stakeholders. Demand Tasks can be used to track that work. • Initial Resource, Cost, and Benefit Planning is done by the Demand Manager. All or some of this can be skipped depending on the level of governance required. • Stakeholders complete assessments if required and an overall prioritization score is generated.
DMD 3.0	Approve Demand	Approval. Complete	• Stakeholders work with the Demand Manager to Evaluate the Demands. Evaluation is based on Assessment Scores, Size, Scope, and Cost. • Demands can be Approved for execution or Deferred for re-consideration in the future. • Approved Demands create a corresponding project/enhancement/demand/change record. • An approved Demand will be automatically completed once related record of Project, Enhancement, Change, Problem is closed. The Demand can also be manually completed by the Demand Manager.

Create Demand

DEMAND MANAGEMENT - CREATING DEMAND
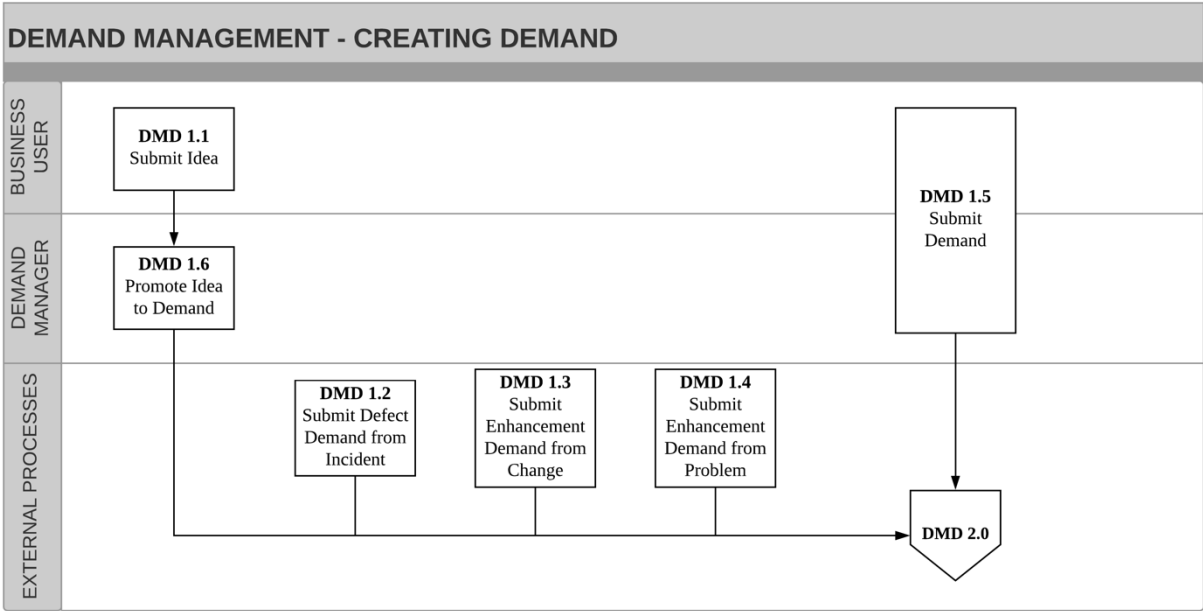
Figure 2. Create Demand

Create Demand Work Instructions

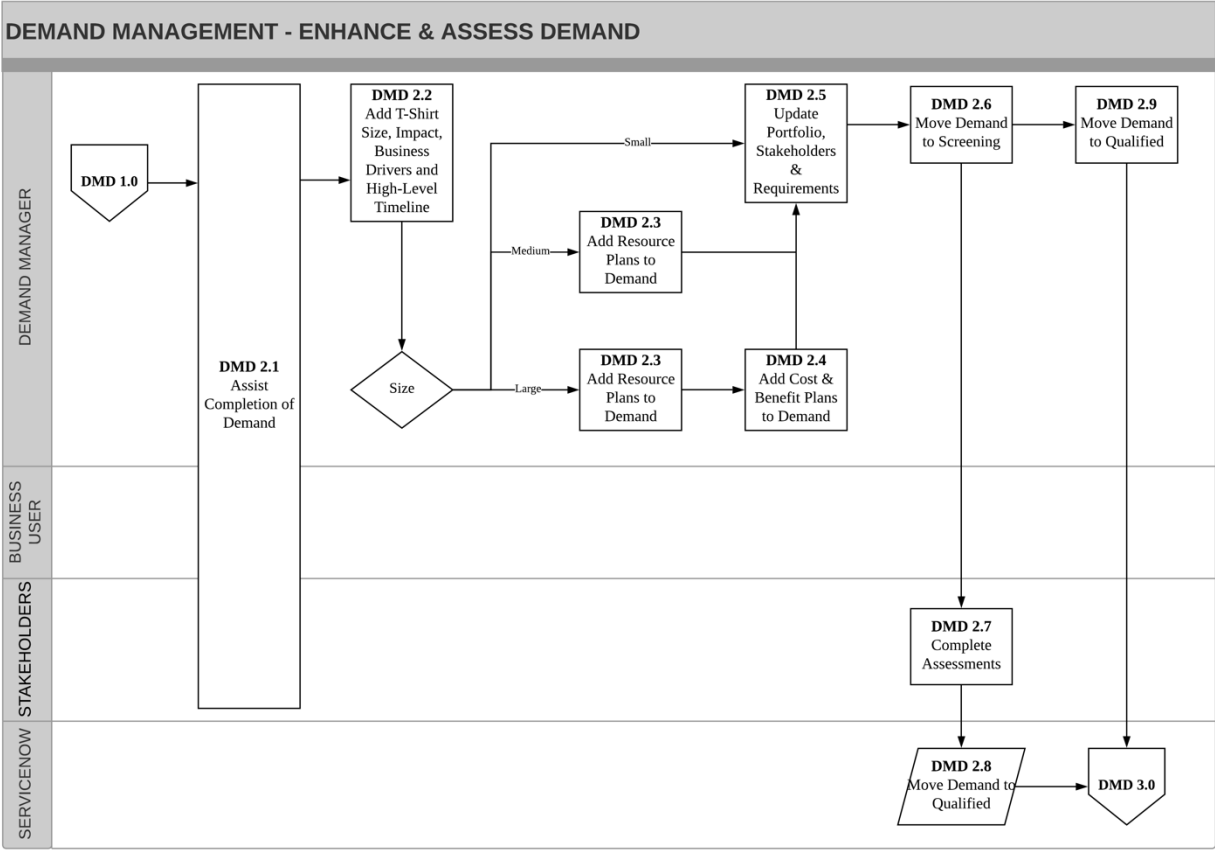| ID	Tasks	Procedure	Primary Role	Input	Output
DMD 1.1	Submit Idea	From the Service Portal, a Business User can submit an Idea via the "Submit Idea" catalog item, or via the Innovation Portal. These submitted Idea can be evaluated by the appropriate Demand Manager	Business User	Idea	Idea Record
DMD 1.2	Create Defect Demand from an Incident	An Incident user can create a related Defect Demand for an Incident	Incident User	Incident	Demand record of type Defect in Draft State
DMD 1.3	Create Enhancement Demand from a Change	A Change user can create a related Enhancement Demand for a Change	Change User	Change	Demand record of type Enhancement in Draft State
DMD 1.4	Create Enhancement Demand from a Problem	A Problem user can create a related Enhancement Demand for a Problem	Problem User	Problem	Demand record of type Enhancement in Draft State
DMD 1.5	Create Demand	A Business User can create a new Demand from the Service Portal using the 'Create a New Demand' catalog item. A Demand Manager or Demand User can create a new Demand directly from the Demand Application.	Demand Manager/Business User	Demand	Demand Record in Draft State
DMD 1.6	Promote Idea to Demand	Demand Manager evaluates an Idea based on several factors such as size and scope, impact of implementing and not implementing the Idea etc. Once evaluated, the Demand Manager promotes the Idea to a Demand for further investigation.	Demand Manager	Idea	Demand record in Draft State

Enhance Demand

DEMAND MANAGEMENT - ENHANCE & ASSESS DEMAND

Figure 3. Enhance Demand

Enhance Demand Work Instructions

ID	Tasks	Procedure	Primary Role	Input	Output
DMD 2.1	Assist Completion of Demand	Once the Demand has been created, the Demand Manager will review and continue to populate additional details required to fully assess the Demand. In most scenarios, they may seek out assistance from the Business user and other Stakeholders for additional information.	Demand Manager	Demand Record in Draft State	Demand Record in Submitted State
DMD 2.2	Add T-Shirt Size, Impact, Business Drivers, and High-Level Timeline	Once all relevant information has been completed, the Demand Manager can begin to size the demand, define the impact it would have on the organization and input a high-level timeline.	Demand Manager	Demand Record	Demand Record
DMD 2.3	Add Resource Plans to Demand Request (For Large / Medium Demand)	If the Demand is of sufficient size and complexity, the Demand Manager can create Resource Plans for the demand. When the demand is being evaluated for execution, availability of the resources required can be viewed.	Demand Manager	Resource Requirements	Demand with Resource Plans in Planning State
DMD 2.4	Add Cost & Benefit Plans to Demand Request (For Large Demand)	Should the Demand be of sufficient size and complexity, the Demand Manager can create Cost & Benefit Plans. The Cost and Benefit Plans are used to calculate the Financial return, which is used to calculate the overall Value of the Demand.	Demand Manager	Cost and/or Benefits	Demand with Cost and/or Benefit Plans
DMD 2.5	Update Portfolio and Stakeholder Registry and Add Requirements	When the Demand Manager sets the Portfolio, stakeholders are automatically populated from the portfolio record. Additional Stakeholders can be added as required. If they haven't already, the Demand Manger can add requirements to the Demand record.	Demand Manager	Stakeholders, Requirements	Demand Record assigned to a Portfolio with Stakeholders and Requirements
DMD 2.6	Move Demand to Screening	When all Demand Details are captured, the Demand is moved to Screening. This sends out Assessments to all Stakeholders. During Screening, demand can be scored and a business case for the demand is finalized.	Demand Manager	Demand Record in Submitted State	Demand Record in Screening State and Assessments created
DMD 2.7	Complete Assessments	Stakeholders complete and Submit Assessments based on questions under the Strategic Alignment and Risk categories.	Stakeholders	Assessments	Completed Assessments

DMD 2.8	Move Demand to Qualified (auto)	ServiceNow will automatically set the Demand to Qualified once all Assessments have been submitted.	ServiceNow	Demand Record in Screening State	Demand record in Qualified State
DMD 2.9	Move Demand to Qualified (manual)	At any point while the Demand is in Screening, the Demand Manager may set the Demand to Qualified. This is typically done if it is taking too long for all the Assessments to be completed or Assessments are not required.	Demand Manager	Demand Record in Screening State	Demand record in Qualified State

Approve Demand

DEMAND MANAGEMENT - APPROVE DEMAND

STAKEHOLDERS	DMD 2.0 → **DMD 3.1** Review Demands → Decision — Approve
DEMAND MANAGER	**DMD 3.2** Defer Demand (Defer) · **DMD 3.3** Set Demand to Approved · **DMD 3.4** Create Project, Enhancement, Defect or Change
SERVICENOW	**DMD 3.5** Generate Project, Enhancement, Defect or Change record · Event (When parent Project, Enhancement, Defect of Change is Complete) · **DMD 3.6** Set Demand to Complete · Demand Complete

Figure 4. Approve Demand

Approve Demand Work Instructions

ID	Tasks	Procedure	Primary Role	Input	Output
DMD 3.1	Review Demand	The Stakeholders review all Demands that are currently Qualified using the Workbench. Review is typically conducted during a Governance meeting where all Qualified and Deferred Demands are examined. The outcome of the review may result in Demands being Approved or Deferred.	Stakeholders	Demand record in Qualified State	Demand Approved or Demand Deferred by Stakeholders
DMD 3.2	Defer Demand	Based on the decision of the Stakeholders, the Demand can be Deferred. Deferred demands are generally re-reviewed during the next Governance meeting.	Demand Manager	Demand record in Qualified State	Demand Record in Deferred State
DMD 3.3	Set Demand to Approved	Based on the decision of the Stakeholders, the Demand can be Approved for execution.	Demand Manager	Demand Record in Qualified State	Demand Record in Approved State
DMD 3.4	Create Project, Enhancement, Defect or Change	Once the Demand has been Approved, or at a certain point thereafter, the subsequent Output record can be created by the Demand Manager. The record created will be based on the Category and Type of the Demand record itself - Strategic-Project creates a Project Record Strategic-Enhancement creates an Agile Enhancement record Operational-Defect creates an Agile defect record Operational-Change creates a Change Record	Demand Manager	Demand Record in Approved State	Related Project, Enhancement, Defect or Change record
DMD 3.5	Generate Project, Enhancement, Defect or Change record	Depending on the type of record being created (project, enhancement, defect, change) ServiceNow will copy across key data to reduce the amount of re-entry required.	ServiceNow	Stakeholder, Requirements, Risks, Decisions, Resource Plans, Cost Plans, Benefit Plans associated to the Demand	Stakeholder, Requirements, Risks, Decisions, Resource Plans, Cost Plans, Benefit Plans copied/moved depending on whether Project/Enhancement/Defect or Change

DMD 3.6	Set Demand to Complete	Whilst the Demand Manger can set the Demand record to Complete at any time, ServiceNow will automatically set the Demand record to Complete if the associated record (project, enhancement, defect, change) is marked as complete.	ServiceNow	Demand record in Approved State	Demand record in Completed State

Demand Field Attributes

*Indicates fields that are Mandatory

#	Demand Section/Tab	Field Name	Purpose	Stage When Field is Populated	Field Type
1	Header	Name*	Name for the demand	Draft	Text Field
2	Header	Category*	Helps categorize demand as Operational vs. Strategic	Draft; Submitted	Choice
3	Header	Type*	Identifies type of demand being requested. Choices include Project, Enhancement, Change, and Defect. The Category field determines available choices for this field.	Draft; Submitted	Choice
4	Header	Number*	Unique, auto-generated identification number for the demand	Draft; Submitted	Auto-generated
5	Header	Start Date	Planned Start date for the demand. *NOTE: When you change planned start date of a demand or project, the associated cost and resource plans also change if com.snc.project.date_change_cascade is checked.*	Draft; Submitted	Date Field
6	Header	Due Date	Requested completion date for the Demand	Draft; Submitted	Date Field
7	Header	Improvement	Linked Improvement Initiative	Approved	Reference
8	Details	Portfolio	Portfolio indicating the business focus of the demand	Draft; Submitted	Reference
9	Details	Program	Name of the program to which the demand belongs	Draft; Submitted	Reference
10	Details	Investment Class	Define whether this Demand is contributing to Change/Transformation or if it is a Run/KTLO initiative	Draft; Submitted	Choice
11	Details	Investment Type	Define what the Demand will contribute towards	Draft; Submitted	Choice
12	Details	Submitted By	Full name of user submitting the demand	Draft; Submitted	Auto-filled Reference
13	Details	Demand Manager	Name of Demand Manager responsible for ushering the demand through the process	Draft; Submitted	Reference

14	Details	Collaborators	Lists all users identified by Demand submitter who can view/edit the Demand	All Stages	Watch-list Field
15	Details	Priority	Set the priority of the Demand which can then be used as a consideration when prioritizing	Draft; Submitted	Choice
16	Details	Department	Department in a business unit to which the demand submitter belongs. If no value is chosen in this field, it is auto populated with the name of the department to which the submitter belongs.	Draft; Submitted	Reference
17	Details	Business Unit	Business unit to which the demand submitter belongs	Draft; Submitted	Reference
18	Details	Impacted Business Unit	Business Unit/s impacted by the Demand	Draft; Submitted; Screening	Watch-list Field
19	Details	Business Capabilities	If the demand is to change, enhance, or add one or more business capabilities, they can be associated to the demand. Business capabilities are defined in the Application Portfolio Management module.	Draft; Submitted; Screening	Watch-list Field
20	Details	Business Applications	If the demand is to change, enhance, or add one or more business applications, they can be associated to the demand. Business applications are defined in the Application Portfolio Management module. This field displays all the business applications that are related to the business capability selected in the Business Capabilities field.	Draft; Submitted; Screening	Watch-list Field
21	Details	Idea	Unique identifier of the idea from which the demand was created	Draft	Reference

22	Business Case	Strategies	Strategic objectives of the organization that the demand fulfils. A demand can fulfil multiple strategic objectives. If a Business Unit for the demand is selected in Details tab, then the choice list displays the business strategies for the selected business unit along with other enterprise strategies	Draft; Submitted; Screening	Watch-list Field
23	Business Case	Goals	Goals associated to the selected strategy. A demand can fulfil multiple goals. If a strategy is not selected, then all goals are displayed in the choice list	Draft; Submitted; Screening	List Field
24	Business Case	Business Case	Arguments justifying need for the Demand	Draft; Submitted; Screening	Text Box HTML
25	Business Case	Risk of Performing	Risks if the demand is approved and implemented	Draft; Submitted; Screening	Text Box HTML
26	Business Case	Risk of Not Performing	Risks if the demand is not approved, for example, risk of loss of opportunity	Draft; Submitted; Screening	Text Box HTML
27	Business Case	Enablers	Key enablers for the Demand	Draft; Submitted; Screening	Text Box HTML
28	Business Case	Barriers	Major barriers to the Demand	Draft; Submitted; Screening	Text Box HTML
29	Business Case	In Scope	Scope of the demand. It is the set of boundaries that define the extent of a demand	Draft; Submitted; Screening	Text Box HTML
30	Business Case	Out of Scope	Activities or deliverables that are not in the scope of the demand. Anything which is not defined in the scope is out of scope	Draft; Submitted; Screening	Text Box HTML
31	Business Case	Assumptions	Assumptions made for the demand. Assumptions help to define scope and risks, and fine-tune the estimates for time and cost	Draft; Submitted; Screening	Text Box HTML
32	Financials	Rate Model	Select the Rate Model to be used for Labor Resources consumed by the project.	Draft; Submitted;	Reference
33	Financials	Capital Expense	Capital expenditure (Capex) for the demand	Submitted	Currency
34	Financials	Operating Expense	Operational expenditure (Opex) for the demand	Submitted	Currency

35	Financials	Total Planned Cost	Result is calculated based on values in the Capital expense and Operational expense fields	Submitted	Currency
36	Financials	Financial Return	Total planned cost – Financial Benefit	Submitted	Currency
37	Financials	Financial Benefit	Estimate of revenue if the demand is approved. This value is either rolled up from the benefit breakdown of the demand or can be entered manually	Submitted	Currency
38	Financials	ROI %	Result is calculated based on values in the Total costs and Financial return fields	Submitted	Numerical Value
39	Financials	Capital Budget	Total capital budget allocated to the demand across all fiscal years. The value is rolled up from the capex budget of the demand	Submitted	Currency
40	Financials	Operating Budget	Total operational budget allocated to the demand across all fiscal years. The value is rolled up from the Opex budget of the demand	Submitted	Currency
41	Financials	Discount Rate	Demand discount rate. The discount rate is the interest rate to determine the present value of future cash flows.	Submitted	Decimal
42	Financials	Net Present Value	Present value of future cash based on the given annual interest rate. It is a measure for comparing money spent today against future expected financial benefits. It helps when evaluating the overall investment performance.	Submitted	Currency
43	Financials	Internal Rate of Return %	Annual interest rate required to achieve an NPV of zero. Internal rate of return (IRR) helps to determine which demands can deliver higher rate of return in terms of revenue.	Submitted	Decimal
44	Assessment Data	Impact	Impact of implementing the proposed Demand. Impact is represented as High, Medium, or Low	Submitted; Screening	Choice
45	Assessment Data	Risk	Calculate risk value based on assessment	Screening	Numeric Decimal
46	Assessment Data	Value	Calculated business value based on assessment	Screening	Numeric Decimal

47	Assessment Data	T-Shirt Size	Estimated size of the Demand described as XX-Large, X-Large, Large, Medium, or Small. *NOTE: Before using T-Shirt size as an indicator of demand size, consider creating and publishing definitions for each option, outside the application. This process ensures that the values are interpreted correctly and consistently across the organization or department*	Submitted	Choice
48	Assessment Data	Score	Demand score is calculated based on risk, value, and size attributes in the base system. The value of the risk, value, and size attributes is based on demand assessments. High risk and size = Low demand score. High value = High demand score. *Note: The score formula can be configured based on your business requirements.*	Screening	Numeric Decimal
49	Notes	Watch List	List of groups and users who are subscribed to the demand and who can view Additional comments	Any Stage	Watch-list Field
50	Notes	Work Notes List	List of groups and users who are subscribed to the demand and who can view Work notes	Any Stage	Watch-list Field
51	Notes	Work Notes	Information about the demand. Not visible to customers. Work notes are added throughout the demand management life cycle to communicate with other users associated with the demand	Any Stage	Text Box HTML
52	Notes	Activities	Captures transactional history for the demand	Auto-populated; View Only	List

53	Related Link	Create Project/Enhancement/Defect/Change	This link appears depending on the Category and Type fields. To create the associated record for this demand, click this link. The number of the new record is displayed in a new reference field that appears on the Demand form.	Approved	Hyperlink
54	Related Link	Demand Budget	Allows allocation of budget to the Demand	Submitted	Hyperlink
55	Related Link	Create Baseline	Allows for the creation of a snapshot of the demands cost and benefit plans.	All	Hyperlink
56	Related List	Stakeholders	Lists all Stakeholders for the Demand. Clicking New allows addition of new stakeholders, while clicking Edit allows addition from list of stakeholders associated to the Portfolio	Submitted	List
57	Related List	Requirements	Allows addition of requirements for the Demand	Submitted	List
58	Related List	Risks	Allows addition of Risks for the Demand. Risks are added to associated Program and/or Portfolio.	Submitted; Screening	List
59	Related List	Decisions	Allows addition of Decisions for the Demand.	Submitted; Screening	List
60	Related List	Resource Plans	Demand Manager can identify resource/s required for the Demand.	Submitted	List
61	Related List	Cost Plans	Demand Manager can create a cost plan that captures all External Labor and Non-Labor Cost for the Demand. Demand Cost Plans are added to the Parent Program and Portfolio	Submitted	List
62	Related List	Benefit Plans	Demand Manager can identify financial benefits for the Demand.	Submitted	List

63	Related List	Demand Baselines	Demand Manager can review how the Cost and Resource Plans have changed if baselines have been created	All	List
64	Related List	Demand Budget	List Demand Budget by Fiscal Year	Submitted	List

Metrics, Reports and Homepages

There are numerous metrics and default reports available in ServiceNow that can be used to generate charts, publish to a URL, or schedule to run and distribute at regular intervals. Users can also create custom reports. See Creating Reports in the ServiceNow Wiki for more detail on this capability.

For Demand Management, there are two special reports that can be used. Bubble Charts can be used to compare Demands against each other. The Demand Backlog can be used to see the Proposed End Dates of any Demands that are in the System.

In addition to reports, each user can create a personal homepage and add gauges containing up-to-the-minute information about the current status of records that exist in ServiceNow tables. See Customizing A Homepage in the ServiceNow documentation for details.

Recommended Metrics	Rationale
% of Demands Submitted from total number of Draft Demands	Determines the proportion of requests that progress to be a demand. It may indicate that the quality of submissions is low.
Total Number of Approved Demands	To help determine the future workload of project delivery
Percentage of Demands that move to Approved	Determine the percentage of Demands that move to the Qualified state. High percentage of Qualified Demands may indicate future investment requirements.
Percentage of Demands that move to More Information	The quality of documented ideas may be low indicating training requirements
Average time to move from Submitted to Approved	To determine the efficiency of the Demand Management Process

Demand Workbench

The demand workbench provides a central location for viewing and assessing business demands. The workbench makes it easy to manage demands by presenting multiple interactive views of demand information on one page. The workbench is split into two panes: the top pane presents an interactive bubble chart for assessing demands and the bottom pane displays the demand details in a list view.

The demand workbench provides real-time interaction between the two panes. Modifying a demand in the bubble chart automatically updates the values in the demand record. Similarly, changes made to a demand record are automatically reflected in the bubble chart.

By default, the workbench displays demands screened by stakeholders or qualified by the demand manager. With the demand manager role, you can use the workbench to:

- View, evaluate, and update demands
- Create demands
- Create artifacts from demands, including projects, enhancements, changes, and defects
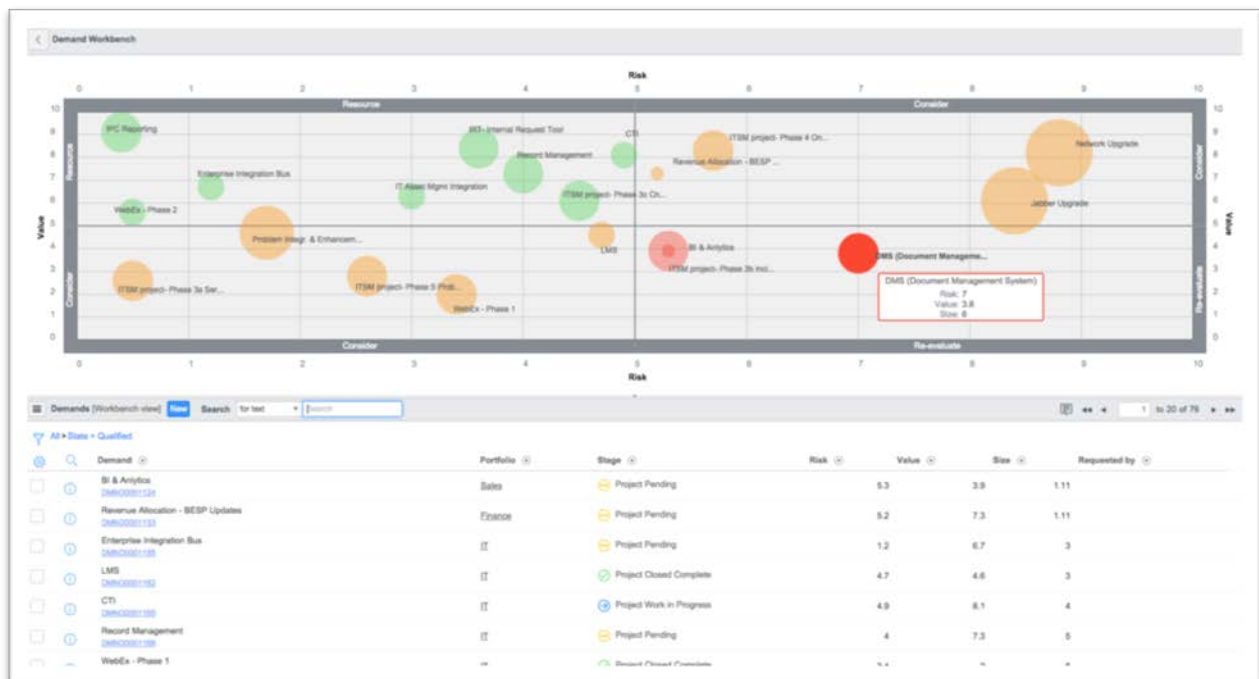
Demand Workbench - Bubble Chart

The interactive bubble chart on the demand workbench is a dynamically updated graph that plots metrics for multiple demand records. Demand managers can use bubble charts to visualize, compare, and evaluate the relative standing of demands in three categories: risk, value, and size. The X-axis represents the risk of a demand, the Y-axis represents the value, and the Z-axis represents the size. Demands are plotted as circles, or bubbles, which vary in size according to the size of the demand. All three measurements are based on values between 0 through 10. This scale allows demand managers to see how one demand compares to other demands in the chart.

The bubble chart contains four quadrants, with each quadrant representing the value versus risk tradeoff for the demand. The quadrants are labeled along the edges of the bubble chart to represent this combination of value versus risk. The color of the bubbles displayed in each quadrant also represents the value versus risk tradeoff.

- The upper left quadrant, labeled Resource, contains demands with high value and low risk. Green bubbles represent demands in this quadrant.
- The lower left and upper right quadrants, labeled Consider, contain demands that require further evaluation. The lower left quadrant contains demands with low risk but low value while the upper right quadrant contains demands with high value but high risk. Orange bubbles represent demands in these quadrants.
- The lower right quadrant, labeled Re-evaluate, contains demands with low value and high risk. Red bubbles represent demands in this quadrant.
- Each bubble also includes a label with the name of the demand.

From the demand workbench bubble chart, you can perform the following actions:

- Point to a bubble to view a summary of the demand, including the demand name and the risk, value, and size.
- Click a bubble to open a sizing window and change the size of the demand.
- Click and drag a bubble to increase or decrease the risk or value of the demand.
- Right-click a bubble to view the demand, create an artifact, or view an artifact that has been created from a demand.
- Changes made to a demand in the bubble chart are automatically updated in the demand record.

Demand Workbench – List View

The lower pane of the demand workbench displays a list of the demands shown in the bubble chart.

The bubble chart list view displays up to 20 demands at a time. Page forward and back through the list to display additional demands.

The Demand column displays the demand number which provides a link to the Demand form. The Stage column displays the status or progress of the demand. For more information, see Stage Fields.

The interactive bubble chart is updated whenever you change a demand in the list view. If you create a new demand from the demand workbench, it is created in a qualified state and appears on the bubble chart. When a demand is promoted to a project, enhancement, change request, or defect, it is removed from the bubble chart.

Performing the following tasks in the list view affects the demands displayed in the bubble chart:

- Searching or filtering the records in the list view displays the bubbles for those demands that meet the search or filter criteria.
- Adding or deleting records in the list view adds or deletes the corresponding bubbles.
- Paginating the list view by clicking any of the page arrow icons displays the bubbles for the demands that appear on the current page.

Project Management

Introduction

The concepts described in this guide align with Project Management Institute, Inc. (PMI) standards 2013 and may reference capabilities that are dependent on other ServiceNow applications. These references are noted by *blue italicized font*.

There are two main types of project portfolio management (PPM) implementations with differing PPM needs:

- Execution-level PPM implementation: Project managers, resource managers, and team members interested in a project and resource management product to manage the tactical details of project execution and in using reporting services to communicate progress and expenditures back to business sponsors and management.

- Project portfolio-level PPM implementation: Business sponsors, steering committees, and project management offices (PMOs) interested in creating project-related decision frameworks, selecting specific projects based on those frameworks, planning the delivery of those projects or investments, tracking those investments at a high level, and reporting on these activities.

Overview of Project Management

Project management is the application of knowledge, skills, tools, and techniques to project activities to meet the requirements of projects of all sizes, from small projects with a few tasks to large portfolios of projects that contain complex tasks with various relationships and dependencies. This document describes how ServiceNow supports project management through the appropriate application and integration of the five project management process groups:

- Initiating
- Planning
- Executing
- Delivering
- Closing

Project Description

A project is defined as a temporary endeavor with a defined scope of work and defined start and end points to create a unique product, service, or result that may be tangible or intangible. Because of the unique nature of projects, there may be uncertainties or differences in project results. This is in contrast to "operations" processes that are ongoing and repetitive and follow an organization's existing procedures.

Projects are undertaken at all levels in the organization and can involve any number of individuals, departments, or business units.

Project management is responsible for managing the life cycle of all projects.

Project Management Goal

The primary goal of project management is to apply the appropriate knowledge, tools, and techniques to project activities in order to meet project requirements.

Project Management Objectives

The objectives of project management are to:

- Identify project requirements.
- Address the various needs, concerns, and expectations of project stakeholders throughout the project life cycle.
- Facilitate and maintain collaborative project communications among project team members and stakeholders.
- Manage stakeholder expectations and satisfaction with respect to requirements and deliverables.
- Stabilize competing demands such as project resources, budget, schedule, scope, issues, and risks.

Objectives for PPM Interoperability with ITIL

Consider how to best leverage a single system of record for both ITIL (IT business operations management) and PPM. This means that Incident, Problem and Change, Service Catalog, the CMDB, and other applications interoperate seamlessly with the Project application.

	Relation Description	Input	Output
Configuration Management	- Underpins ITIL and project management activities. - Can host the project and other IT service management records. - Contains details of the infrastructure vital to a project. - Single consistent view of all ITIL and project activities against a CI to keep all stakeholders in sync, mitigate impacts, and reduce risks.	X	
	Single consistent view of all ITIL and project activities against a CI to keep all stakeholders in sync, mitigate impacts, and reduce risks.		X
Service Catalog	- Single, simple, and consistent approach to capturing demand and project proposals. - Requester knows exactly what information to provide. - Request information automatically entered into the project management application.		X
	More easily compare project proposals to one another and to existing or in-flight projects while making a selection.	X	
Change Management	A request for change (RFC) can be submitted so that changes to a project can be formally introduced and approved.		X
	Can track project tasks that depend on changes.	X	

	Relation Description	Input	Output
	• Change management is responsible for keeping the project manager informed of all scheduled changes. • Transition issues and risks to the change control process.		
Service Level Management (SLM)	• Defines measurable action taken on critical path tasks. • Provides historical data that enables the PMO to review the project schedule objectively.		X

	• Defines the acceptable timeframe within which the project management schedule works, including:
	  o Project task start times
	  o Acceptable task pause conditions
	  o Target completion times
		X	

Relationship with Other Processes

Project Management process may interact with other processes, which are already available in ServiceNow:

	Relation Description	Input	Output
Demand Management	• Approved Demands will become managed Projects	X	
Resource Management	• Resource Plans can be generated during the Project Process	X	X
Agile/Safe	• Agile stories dates are rolled up to project and delivery progress is managed by the project manager	X	X
Test Management	• Manage the test schedule	X	X
Financial Management	• Provide costs to modeling engine and show back		X
Application Portfolio Management	• Manage applications & costs, to ensure alignment and easily adapt to change	X	X
Enterprise Release Management	• Plan and manage enterprise releases, product releases, and deployment process		X
Investment Funding	• Funding for Projects, Portfolios or Programs can be managed using the Investment Funding application		X

Principles and Basic Concepts

Project Policies

Project management policies are required to guide all staff in the behaviors that make project management effective. Policy statements depend on the culture of the organization, but should address the following:

- Use of a single management system for projects and IT operations.
- Need to align project management with overall business objectives.
- Fact that a project may be initiated from an incident, defect, change, or enhancement, but those tasks never become a project.
- Appropriate use of social and mobile tools for project management communication and notification.
- Use of routine project process audits to ensure correct process and deliverables.

Project States

Project tasks are tracked throughout the project life cycle to support the project schedule and status reporting. The state of a project or project task indicates where it is in relation to the project schedule and informs the project manager, team members, and stakeholders of project status. The typical uses of the base system state values are:

- Pending: default value when a record is created.

- Open/Work in progress: work is in progress.

- Closed complete: work is completed, and task is closed.

- Closed incomplete: work was done, is not yet completed, but task is closed. This is also used to express "Postponed/Freeze/On-Hold" projects

- Closed skipped: work was not performed, and task is closed. This is also used to express "Cancelled" projects.

Project Templates

Although each project is a unique endeavor, many projects follow a standard or similar process. A project template is a best practice approach to the project process that outlines the activities and deliverables that must be produced to satisfy the project requirements. In ServiceNow, use the Save as New Template feature to create project templates. When you create a template from a project, all of the project attachments, tasks, and checklists are copied to the template. You can add or remove attachments from the template using the Project Template form. See Create a new template for a project for more details.
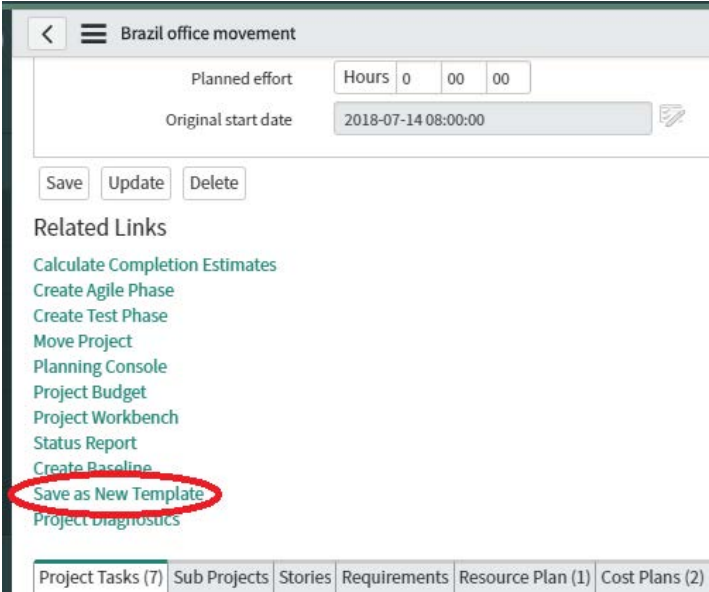
Figure 1: Save as New Template

Copy Project feature is another option to enable project templating. This creates a new project that includes all the tasks, relationships, and document links of an existing project, and makes it easy to create projects using a consistent project process. See Copying a Project for more details.
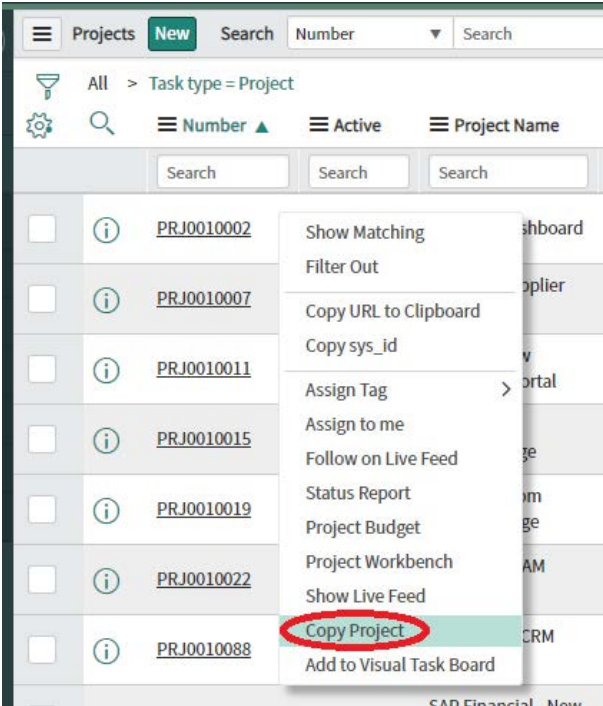
Figure 2: Copy Project Feature

Project Workspace

The project workspace is dedicated to project managers where they can access and manage their projects, having in a single view all project status "cards". Cards can be configured and give access to projects when clicking them.
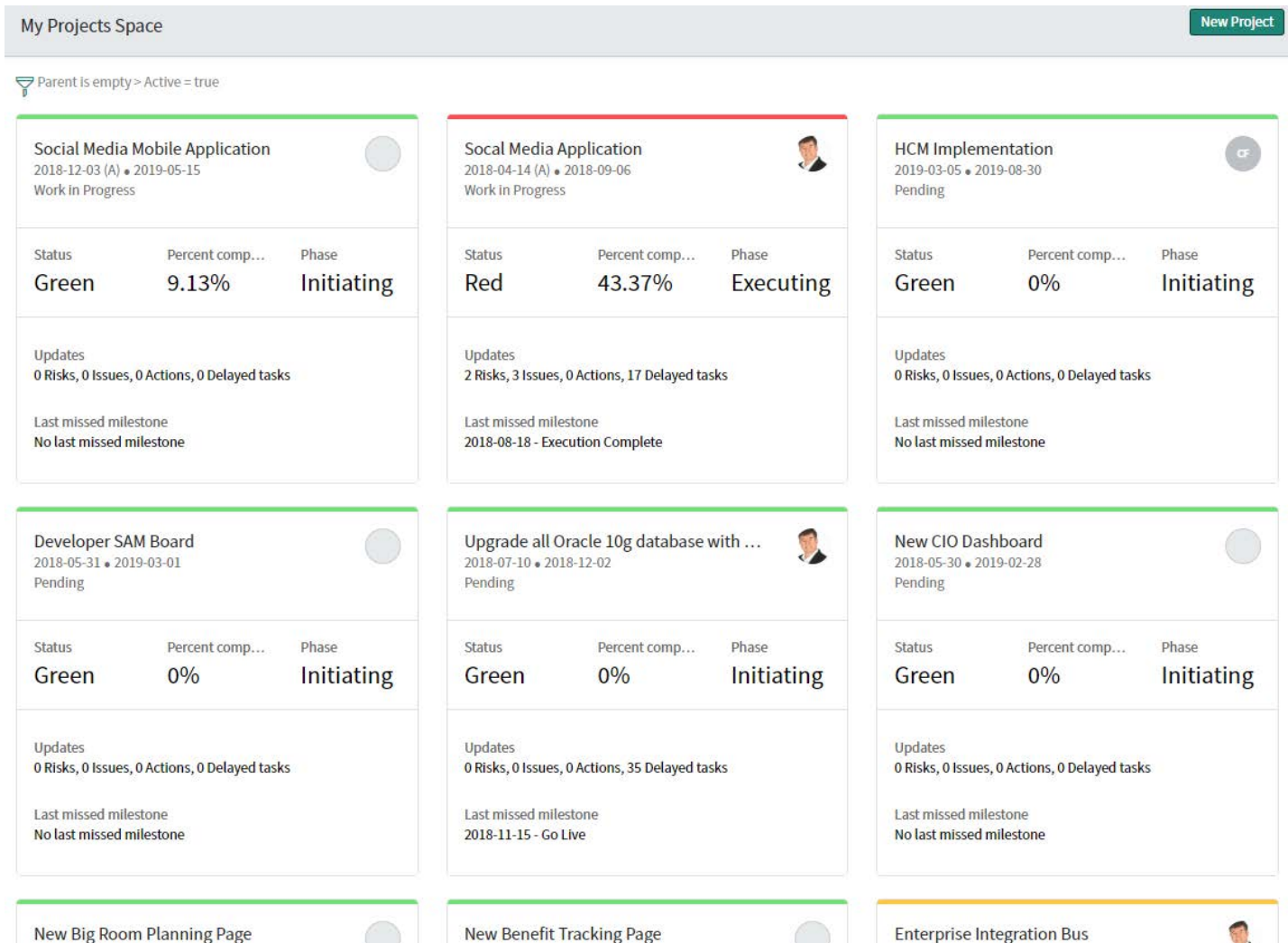
Figure 3: Project Workspace

When project managers access a project, they open its workspace which provides direct access to the project dashboard with "Analytics" tab, and to project details, planning, resources, financials, status report tabs.

Planning Console

Determine the graphical displays for the project using the Planning Console, Project Workbench and Portfolio Workbench.

The planning console gives project managers a comprehensive view of all aspects of a project, including a hierarchical list of sub-projects, if any, project tasks, which appear in a work breakdown structure (WBS) list.

It also includes a Gantt chart, which is a visual representation of a project timeline that shows start and end dates of tasks and the dependencies between tasks. The Gantt chart can be used to add and delete tasks, change task dates and dependencies, and assess the progress of the overall project.
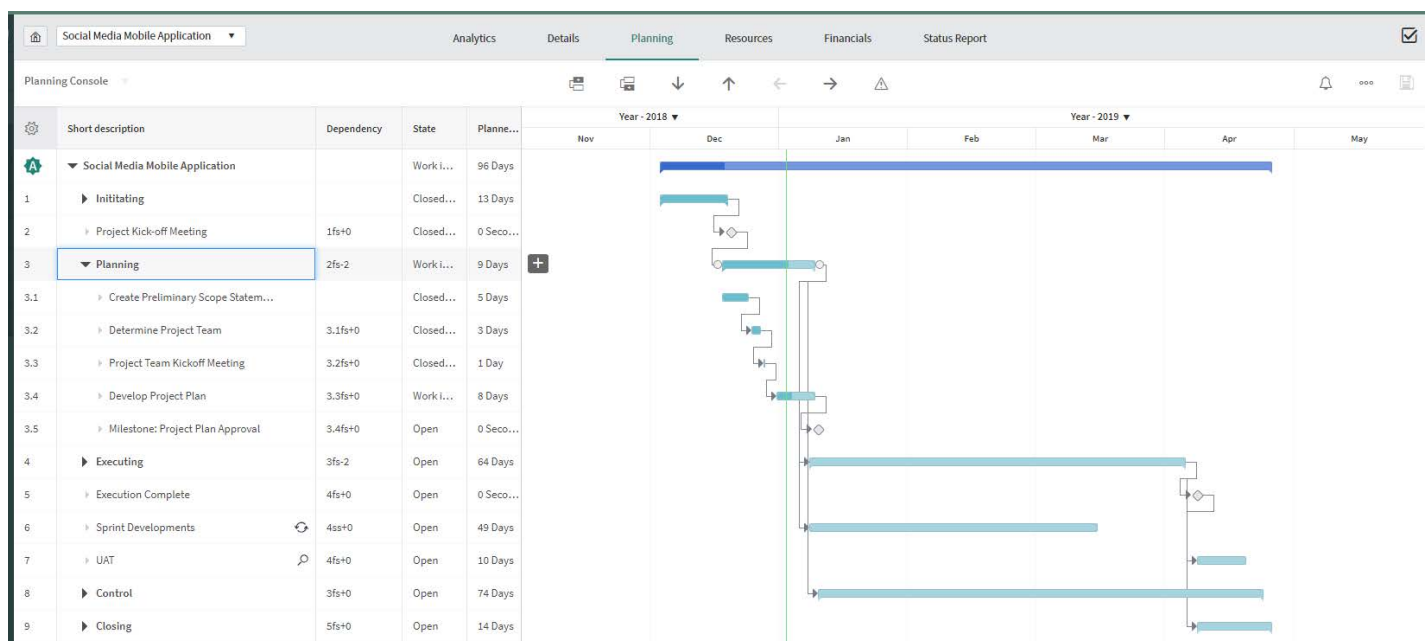
Figure 4: Interactive Planning Console

Schedule

Schedule pages can be displayed in a daily, weekly, or monthly view. A schedule page is a record that contains a collection of scripts that allow custom generation of a calendar or timeline display. For a discussion of how calendars are created with schedule pages, see Schedule Pages and Invoke the Schedule page and view a calendar.

Project Workbench

The project workbench makes it easy to manage projects by presenting project information in two panes. The top pane displays a timeline with the project phases and milestones; the bottom pane displays details for the phase selected in the timeline. The phase can be of Waterfall type to manage Project Tasks, Agile type to manage Stories, or Test type to manage Test cases. The project workbench provides real-time interaction between the timeline, the list view, and the visual task board. It includes the following key components:

- Project workbench detail view – The detail of the selected project phase
- Project workbench milestones – Indicate important project dates
- Project workbench phases – Represented by the horizontal bar
- Project calculation:
    - Automatic – when a dependent project task date is modified, the parent task automatically recalculates its dates
    - Manual – dates on parent tasks do not change when a dependent task is changed
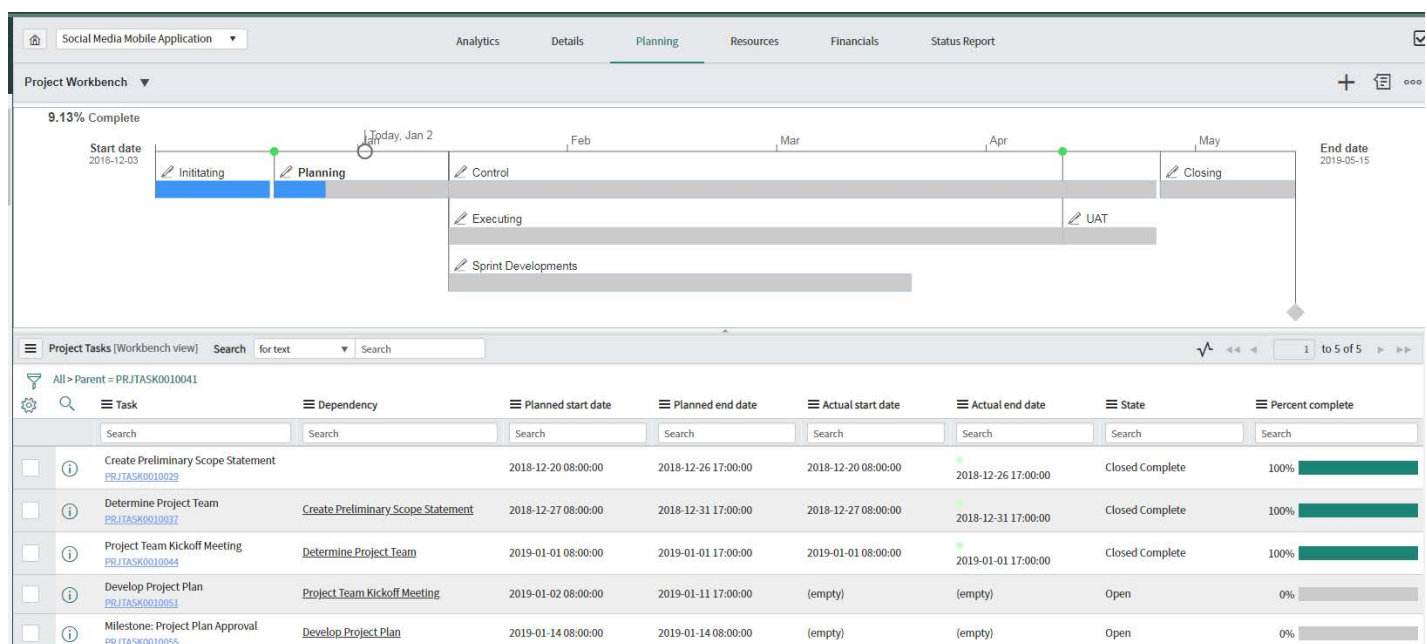
Figure 5: Project Workbench

Portfolio Workbench

The [portfolio workbench](#) enables project and portfolio managers to perform project financials and then track their projects and portfolios. The workbench gives Portfolio managers the ability to determine overall cost requirements for their portfolios. It allows them to select projects for next fiscal year(s) based on budget target and resource availability and allocate approved budget to projects. Tracking of actuals can be performed against allocated budgets.
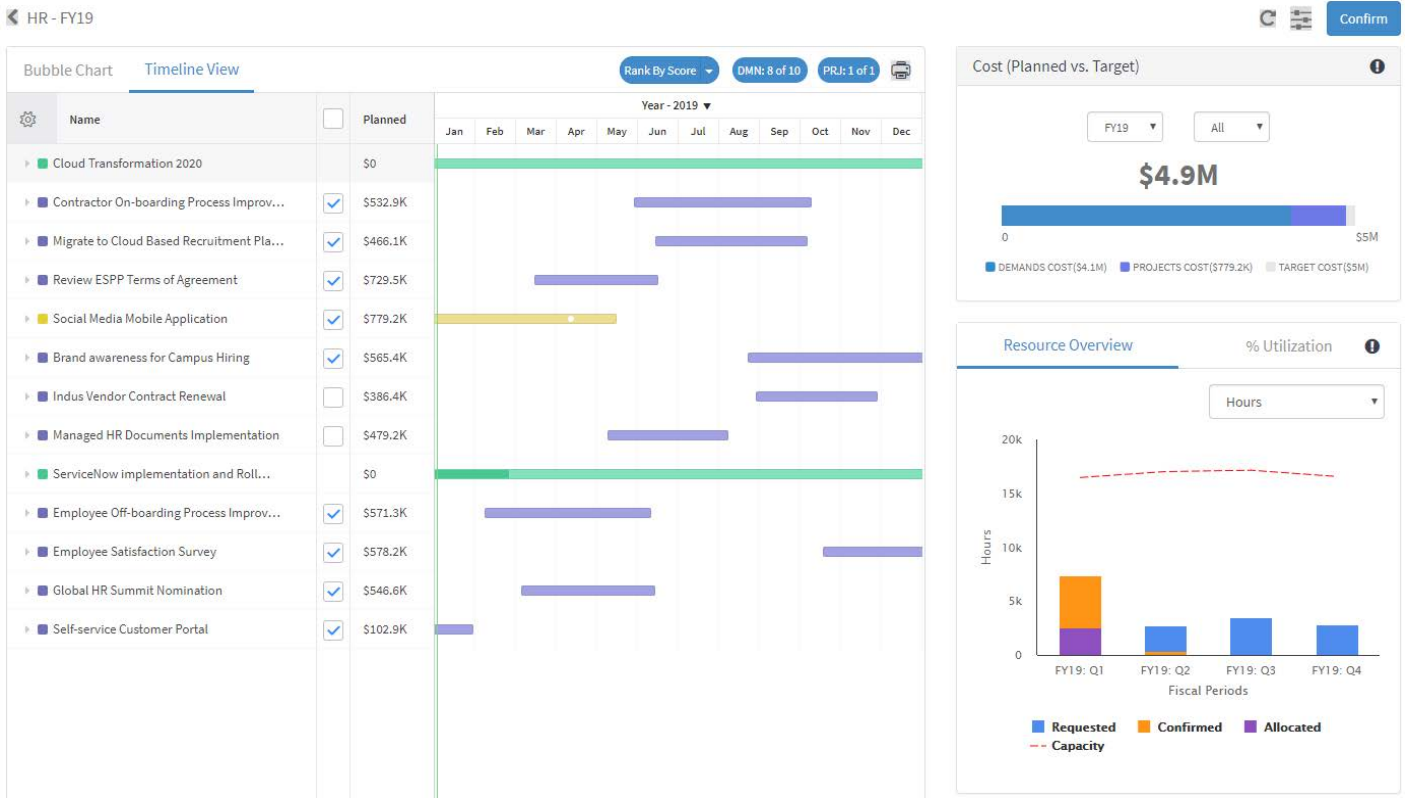
Figure 6: Portfolio Workbench

Program Workbench

The [program workbench](#) allows the PMO to define a new 'Program'. A 'Program' is a group of related projects, demands, and program activities managed in a coordinated way to obtain benefits not available from managing them directly. These programs are managed by program managers. The program manager should be allowed to create tasks specific to the program. These tasks are essential for successful completion of the program but are outside the scope of projects. The program manager can also define key milestones, anticipated risks and issues for the program. The program manager also ensures that all participant projects of the program are on track in terms of cost, resources, and schedule.
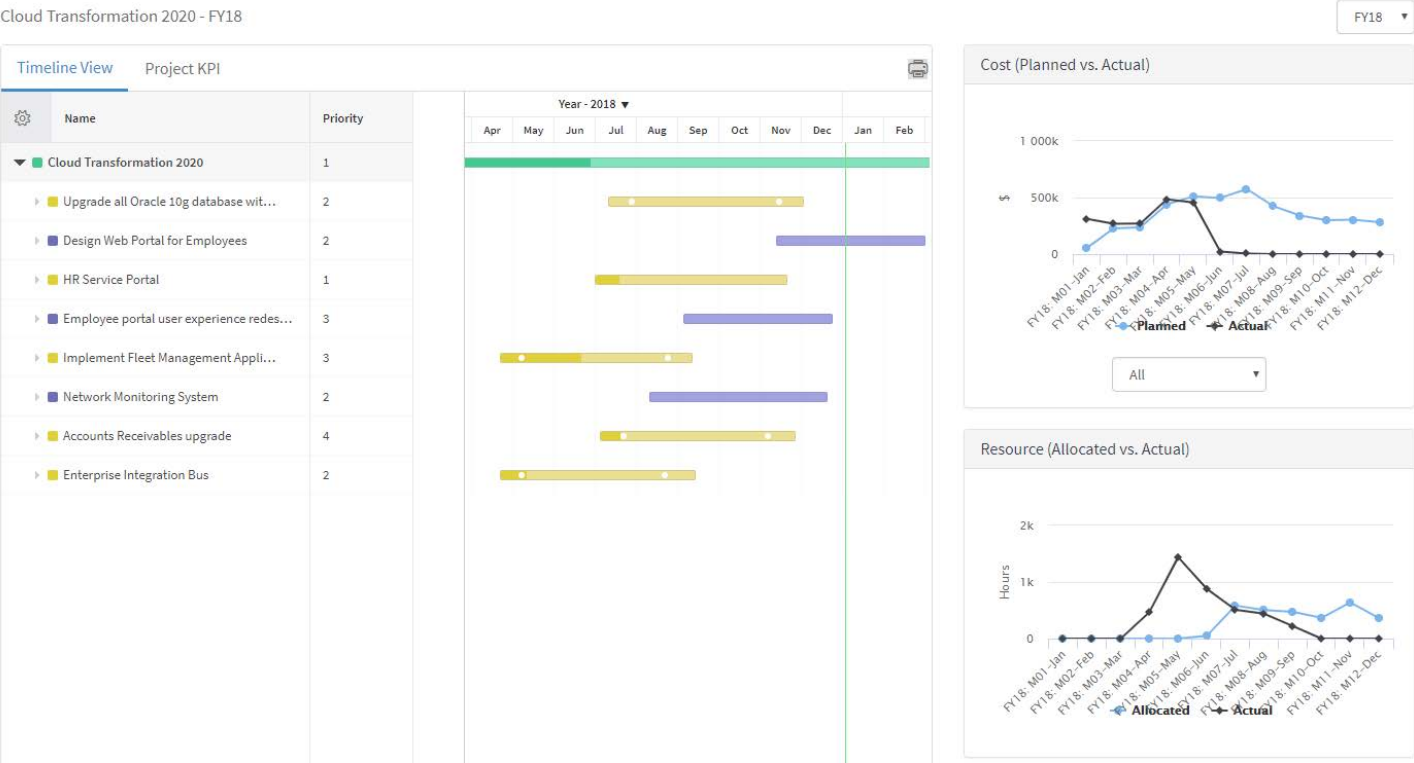
Figure 7: Program Workbench

Project Roles

Each role is assigned to individuals who perform specific tasks within the project process. There can be more than one individual associated with a specific role. Additionally, a single individual can assume more than one role within the project process. The structure and maturity of the project process determine which roles exist in an organization.

The following table describes typical roles defined for project and portfolio management.

Role	Description
Project Management Office (PMO)	Senior management team with the ability and authority to ensure the project process is rolled out and used by the entire organization. Responsible for: • Defining the overall mission of the project process. • Establishing and communicating the project process mission, goals, and objectives to all stakeholders. • Resolving any cross-functional issues. • Ensuring consistent execution of the project process across the organization. • Monitoring the effectiveness of the project process across all active projects and reporting to senior management. • Initiating any project process improvement initiatives. • Developing associated training criteria and coaching for all project management processes.
Project Manager	Project managers have the responsibility of planning, execution, and closing of projects. Responsible for: • Managing the day-to-day activities of the project. • Driving the efficiency and effectiveness of the project management process. • Recruiting, building, and leading an effective project team. • Ensuring project progress by managing the interaction of project tasks. • Managing issues to reduce risks, maximize benefits, and restrict costs.
Team Member	Project team members are responsible for executing tasks and producing deliverables as outlined in the project plan and directed by the project manager, based on the level of effort defined for them. Responsible for: • Working on project tasks. • Communicating project task status, issues, and risks. • Producing project task deliverables. • Entering time worked.

Role	Description
Resource Manager	Resource managers ensure the efficient and effective deployment of an organization's resources, as needed. Resources include financial resources, inventory, human skills, production resources, or information technology. The project manager may sometimes assume this role. Responsible for: • Ensuring that available resources are used efficiently to complete the project or project tasks within specified deadlines. • Tracking supply of resources. • Maintaining the resource demand forecast. • Assigning resources to project tasks. • Tracking resource utilization.
Business Relationship Manager (BRM)	The BRM represents the business units' needs, communicates the deliverables the project will produce to the project team, and shares information about the project with the business unit. Responsible for: • Gathering project requirements from the business. • Submitting project requests on behalf of the business. • Tracking project request status and communicating it to the business.
Project Sponsor	The project sponsor secures project funding and resources; champions the project's goals and objectives, monitors project activities, risks, and issues, and is a key decision maker for the project. Responsible for: • Providing funds for the project. • Reviewing project status. • Providing business guidance throughout the project life cycle.
Stakeholders	Stakeholders include groups, units, individuals, customers, and internal or external organizations which are impacted by, or can impact, the outcomes of the project. Responsible for: • Reviewing project status. • Providing business guidance and support throughout the project life cycle.

Role	Description
Program Manager	Program managers have the responsibility to achieve programs in respect of their strategy, objectives and budget, in order to deliver the business outcomes. Responsible for: • Managing program's demands and projects to articulate the program strategy and objectives. • Driving the efficiency and effectiveness of the program management process. • Coordinate demands and projects which are cross department or cross business units. • Ensuring program risks and issues won't impact project progress.
Portfolio Manager	Portfolio managers make ongoing decisions about the organization's investment mix by selecting portfolio projects based on business objectives and available resources. Responsible for: • Managing the project portfolio. • Maintaining an optimal mix of portfolio investments to meet changing business objectives. • Balancing available resources, including labor, non-labor resources, and finances.
Project Administrator	The Project Administrator is responsible for the technical aspects of the project management application implementation. Responsible for: • Determining the Project Management application properties • Customization of forms and views for project team members and stakeholders • Creation of workflow for project process automation • Customization of record producers for project proposals. • Creation of reports, gauges and dashboards for project team members and stakeholders • Configuration to enable the application to interoperate with other ServiceNow applications.

RACI Matrix

ID	Activities	Business User	Project Manager	Team Member	PMO	Program Manager	Stakeholder/ Sponsor	Resource Manager
PPM 1.0	Project Initiation							
PPM 1.1	Create Project		R		A	C/I	C	
PPM 1.2	Add Project to Portfolio				R/A		C	
PPM 1.3	Assign Project Manager		I		R/A	C/I		
PPM 2.0	Project Planning							
PPM 2.1	Plan the Project		R/A				C	
PPM 2.2	Apply Template		R/A					
PPM 2.3	Add Tasks		R/A	I				
PPM 2.4	Build Task Relationships via the Planning Console		R/A					
PPM 2.5	Confirm and Allocate Resources		C					R/A
PPM 3.0	Project Execution							
PPM 3.1	Start Project		R/A					
PPM 3.2	Create Baseline		R/A					
PPM 3.3	Workflow	I	R/A					
PPM 3.4	Task Status	I	A	R			I	
PPM 4.0	Project Delivering							
PPM 4.1	Manage Variables		R/A					
PPM 4.2	Documentation	I	R/A				I	
PPM 4.3	Risk Register / Issue Management	I	R/A			C/I	I	
PPM 4.4	Project Communication	I	R/A		I	I		
PPM 4.5	Project Status Report	I	R/A	I	I	I	I	I
PPM 5.0	Project Closing							
PPM 5.1	Post Implementation Review		R/A					
PPM 5.2	Close project	I	R/A			C/I	I	
	R: Responsible A: Accountable C: Consulted I: Informed							

Project Management Process

Basics of Project Management

A project is any planned, collaborative effort that is designed to achieve an objective. The Project application not only helps you plan and track projects, it also integrates with other ServiceNow applications.

Setting up a project involves deciding on an approach for creating and linking project tasks and making sure the necessary users and groups are created in ServiceNow so you can assign them to project tasks. After these steps are accomplished, the project can be started. In order to measure the project against initial estimates, it is important to create a baseline, which is a point in time reference of the entire project including all planned dates for all project tasks and milestones.

With the project underway, the project manager continues to access project records and make changes to required items, including costs, priority, schedule, and planned values that are not rollups. The project manager also keeps detailed project records for risks and issues and refers back to them after a project is complete. It is also a best practice to create additional point-in-time baselines along the way, recording dates and cost plans, to easily see if any project phases or tasks are ahead of or behind the original plan, and if project financials are under control.

It is best practice to manage status reports to monitor the projects, which give visibility and manageability to programs and portfolios the projects belong to, and to dashboards the projects report to as investment portal for instance.

When the project is complete, its state is changed to Closed complete on the Project form. When a project is in the closed state, the Project application calculates actual values like Actual duration.

Post-project activities include analyzing project baselines and actual values and generating a final project dashboard. If the project was successful, it can then be used as a template for future projects.

There are several paths available to manage a project. The best path usually depends on business needs. The steps below are considered when determining how to get a project up and running with minimum effort.

NOTE: ServiceNow PPM can be configured to support many alternative project methodologies, including Agile and Waterfall.

Set Up the Project
• Estimate Values and Prepare Resources
• Create the Project
• Add Tasks
• Create Dependencies
• Assign Resources

Manage the Project
• Start the Project
• Create a Baseline
• Monitor Project Dashboards

Close the Project
• Analyze Baselines and Actual Values
• Manage Related Incidents, Problems, and Changes
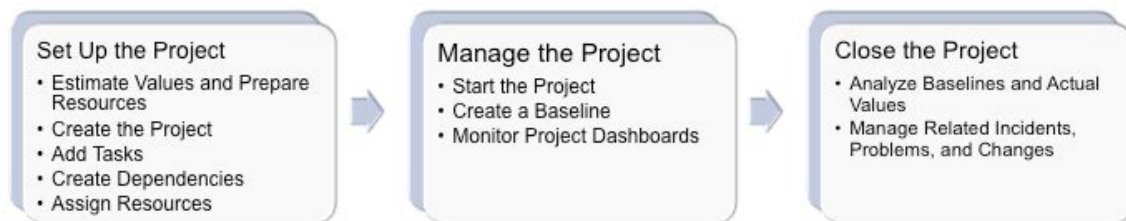
Figure 8: Basics of Project Management

Initiating a Project

Project initiation is the process of evaluating and then approving or rejecting a proposed project. This can be based on the strength of a project's business case, cost, timeframe, and whether the project is aligned to current business objectives or the longer-term strategic plan.

To ensure success, the project should begin with a detailed project definition or request form that is presented to and accepted by stakeholders. This can be used to help ensure agreement and commitment among project team members and stakeholders. The project initiation plan can include the business case, overall goal, specific objectives, success criteria, scope, high-level schedule, stakeholder accountabilities, communication plan, benefits and costs, governance and resourcing, and risk mitigation plans. This helps to ensure a consistent understanding of the project, set proper expectations, and identify the necessary resources to accomplish the project goals.

ID	Tasks	Primary Role	Input	Output
PPM 1.1	Create Project	ACO PMs	Import Microsoft project Create new project	Project Record
	Procedure: Most projects will be created via the Demand Process. For projects that do not require a Demand, they can be created manually. Only ACO PMs can create Projects Manually			
PPM 1.2	Add Project to Portfolio	PMO	Existing projects (any state)	Portfolio projects
	Procedure: If a Portfolio was defined in the Demand Process, it will carry over to the Project. A portfolio is a group of related projects. If a project is related to other projects, create a portfolio and add the project. The Project application provides a useful portfolio view that makes it easy to report on the status of all projects in a portfolio.			
PPM 1.3	Assign Project Manager	PMO	Project Record	Assigned Project Record
	Procedure: After a Project is generated, the PMO will need to assign it to a specific Project Manager			

Planning the Project

Project planning is the process of defining the scope of a project and identifying all prerequisites for project execution. The project definition and scope should be reviewed and approved by the project sponsor and other appropriate stakeholders. Project scope, budget, and schedule should be confirmed. Project deliverables are refined. Risk assessment and mitigation plans are developed. And project team members may be allocated to the project. Project sponsors then provide final approval and authorization to proceed with project execution.

ID	Tasks	Primary Role	Input	Output
PPM 2.1	Plan the Project	Project Manager	Assigned Project Record	Additional details added to Project form (State: Pending)
	Procedure: Setting up a project involves deciding on an approach for creating and linking project tasks and making sure the necessary users and groups are created in ServiceNow so you can assign them to project tasks. Before creating a project, consider the following questions and issues: • Top-down or bottom-up approach to tasking? • Is the project part of a larger portfolio of projects? • What types of dependencies will the tasks have with other tasks? • Can milestones and project baselines help manage the project? • Have the necessary skills, groups, and resources been created in ServiceNow?			
PPM 2.2	Apply Template	Project Manager	Project Record	Project Record with Template Applied
	Procedure: Templates can be used to automatically build out the WBS of a Project. A Template may automatically be applied if selected from the Demand Record. Templates will be filtered so that only the appropriate groups can apply the appropriate Templates.			
PPM 2.3	Add Tasks	Project Manager	Project tasks	Project tasks added to project (State: Pending)
	Procedure: After creating a basic project, populate it with the phases, tasks, and subtasks that comprise the project. At this time, decide whether to focus on top-down planning or bottom-up planning. It is easiest to build task relationships and dependencies while creating sets of tasks. See Creating Project Tasks for more information.			
PPM 2.4	Build Task Relationships via Planning Console	Project Manager	Task dependencies	Gantt chart with project dependencies
	Procedure: Use the Planning Console in conjunction with task forms and related lists to build relationships. Add milestones based on the project's major events and create dependencies between milestones and tasks, if necessary.			
PPM 2.5	Confirm and Allocate Resources	Resource Manager	User resources; Group resources	User resource allocation across the project; User resource and group resource task assignments

ID	Tasks	Primary Role	Input	Output
	Procedure: Resource Plans should be initially generated in the Demand Process. User resources are the individuals (users) in an organization who are assigned to project tasks. An assignment group is a collection of users with similar skills who could be assigned to the same types of project tasks. The Project application uses these resources in the resource workbench, a graphical, interactive map that shows the relationships of project tasks to user resources. Although user or group resources are not mandatory to manage projects in the Project application, verify that any necessary resources are added to ServiceNow through User Administration. Resources also tie into cost management and skills management. See Task Resources for more information on creation and assignment resources and groups.			

Executing the Project

After the project initiation steps are complete, the project can be started and measured against initial estimates. Project automation helps ensure ease of use, which also leads to adoption of and adherence to the project process. A well-defined project communication process will help provide necessary information to the PMO, team members, project sponsor, and stakeholders throughout the project process.

ID	Tasks	Primary Role	Input	Output
PPM 3.1	Start Project	Project Manager	Project record Child project tasks	(Project State) Work in progress project
	Procedure: After creating and linking project tasks and making sure the necessary users and groups are assigned, you can start the project. Use Start project on the Project form or manually change the project state to Work in Progress. This changes the Actual start date of the project to the current date. See Starting a Project for more information.			
PPM 3.2	Create Baseline	Project Manager	Updates to project and project tasks	Initial project baseline; subsequent baselines
	Procedure: Create initial and subsequent project baselines along the way to see if any project phases or tasks or costs are slipping at the time you create the baseline.			

ID	Tasks	Primary Role	Input	Output
PPM 3.3	Workflow	Project Manager	Project process	Workflows for project automation
	Procedure: Consider opportunities for project process automation: • Approvals (project request, resource request, timecard). • Review process at milestones and gates. • Integrated change request process.			
PPM 3.4	Task Status	Project Team Member Project Manager	Project task description State change Percent complete Actual effort or time worked	Updated project actuals (time and cost) Supporting descriptions and details
	Procedure: Project team members update project task status and actual effort so that accurate project status details are available to project manager and stakeholders on a timely basis.			

Delivering the Project

The project manager must continually track budget, scope, and schedule (the "Triple Constraint"), as well as their effect on quality. Proper risk management processes should be defined to mitigate or resolve risks. When a risk arises that threatens the project's scope, budget, schedule, or quality, the project manager must determine the steps to take to ensure the integrity of the project. A list of issues should also be maintained along with an issue management plan that identifies steps for handling issues including, if necessary, transitioning the issue to the change control process.

ID	Tasks	Primary Role	Input	Output
PPM 4.1	Manage Variables	Project Manager	Actual time, effort; cost	Aggregate project effort and costs
	Procedure: Track cost, effort, scope.			
PPM 4.2	Documentation	Project Manager Project Administrator	Project documents and deliverables	Stored project documents Approval process
	Procedure: Consider required project documents and deliverables. Identify document templates; revision, review and approval process; and document sharing and storage. • Attachments • Knowledge base • Managed documents • Gates			
PPM 4.3	Risk Register/Issue Management	Project Manager	Risk management plan Risks/issues related lists	Risk/issues records (related lists)
	Procedure: Determine which risks may affect the project and document the characteristics to enable team members to anticipate risks. Keep detailed project records for risks and issues and refer back to them for analysis after a project is complete.			
PPM 4.4	Project Communication	Project Manager	Stakeholder KPIs and Metrics	Project communication process Dashboards Reports Notifications Live feed group: Project Team
	Procedure: Determine the following project communication requirements: • Stakeholder or project sponsor reports. • Dashboards for PMO, resource managers, project team, and stakeholders. • Types of notifications required. • Social collaboration (Live feed groups and notifications). See Project Reporting for more information on the available reporting options.			
PPM 4.5	Project Status Report	Project Manager	Project, cost, progress, risk, issue, schedule, scope statuses	Meetings and Committees Stakeholders Dashboards

ID	Tasks	Primary Role	Input	Output
	Procedure: Status reports sustain the project communication; active status reporting is an important aspect of communication with all project stakeholders. The Project Status Report allows project managers to report status of their project on weekly or fortnightly basis. Status reports fill portfolio and program workbenches, investment portal and dashboard pages. These reports also can be printed or sent to the stakeholders as attachments. • Evaluate the project overall, schedule, resource, cost, and scope health. • Comment each health status for record and communication.			

Figure 9: Project Status Report

Closing the Project

Project closing typically includes a post-implementation review to gather feedback on the project from the project manager, project team members, project sponsor, and other stakeholders. Their feedback is reviewed to derive any lessons learned and best practices that can be stored in a central repository for use as a reference and guidance for future projects.

The project status is set as Closed complete when it has been successfully implemented and approved or accepted by the project sponsors. The project manager, appropriate extended team members, and stakeholders should now determine if and how well the project met the project sponsor's requirements, including what the team did well and what lessons can be learned from any mistakes. Additionally, the project manager should evaluate ways to improve on processes to develop best practices; and then communicate findings in a post-implementation report.

ID	Tasks	Primary Role	Input	Output
PPM 5.1	Post Implementation Review	Project Manager	Project feedback	Post-implementation report
	Procedure: Gather feedback from project manager, project team members, project sponsors, and other stakeholders for post-implementation reporting • Solicit Feedback • Conduct post-implementation review. • Prepare post-implementation report.			
PPM 5.2	Close Project	Project Manager	Appropriate documents and signoffs	(Project State) Closed complete
	Procedure: Complete all administrative tasks required to bring the project to an official close.			

Project Process Control

Dashboards

PMO Dashboard

PMO Dashboard: Provides a comprehensive view of information related to a Portfolio, Program, Organization or entity owner. It provides the PMs with a logical flow from left to right, with visual queue to actions they might need to take.

It ensures data quality is not impacting decisions, it shows real time trending information, actuals in defined date ranges, schedules using the Calendar. It highlights information where action is needed.

Section	KPI/Metric	Purpose
Summary	Active Projects count. Count projects per investment type, investment class, priority. Rolled up financial amounts for costs and benefits; planned, actuals and forecasts	
Pipeline	Various ages of ideas demands and projects. Conversion ratios from ideas to demands to projects.	
Project Health	Count of projects in red status, overdue, over budget, with high risks, negative ROI, etc.	
Data Quality	Count demands and projects for 12 types of missing data.	

Section	KPI/Metric	Purpose
Actuals	Figures to provide insight into planned, budgeted, actual and benefit costs; into allocated and actual hours.	
Calendar	Show tasks and milestones in a calendar view.	
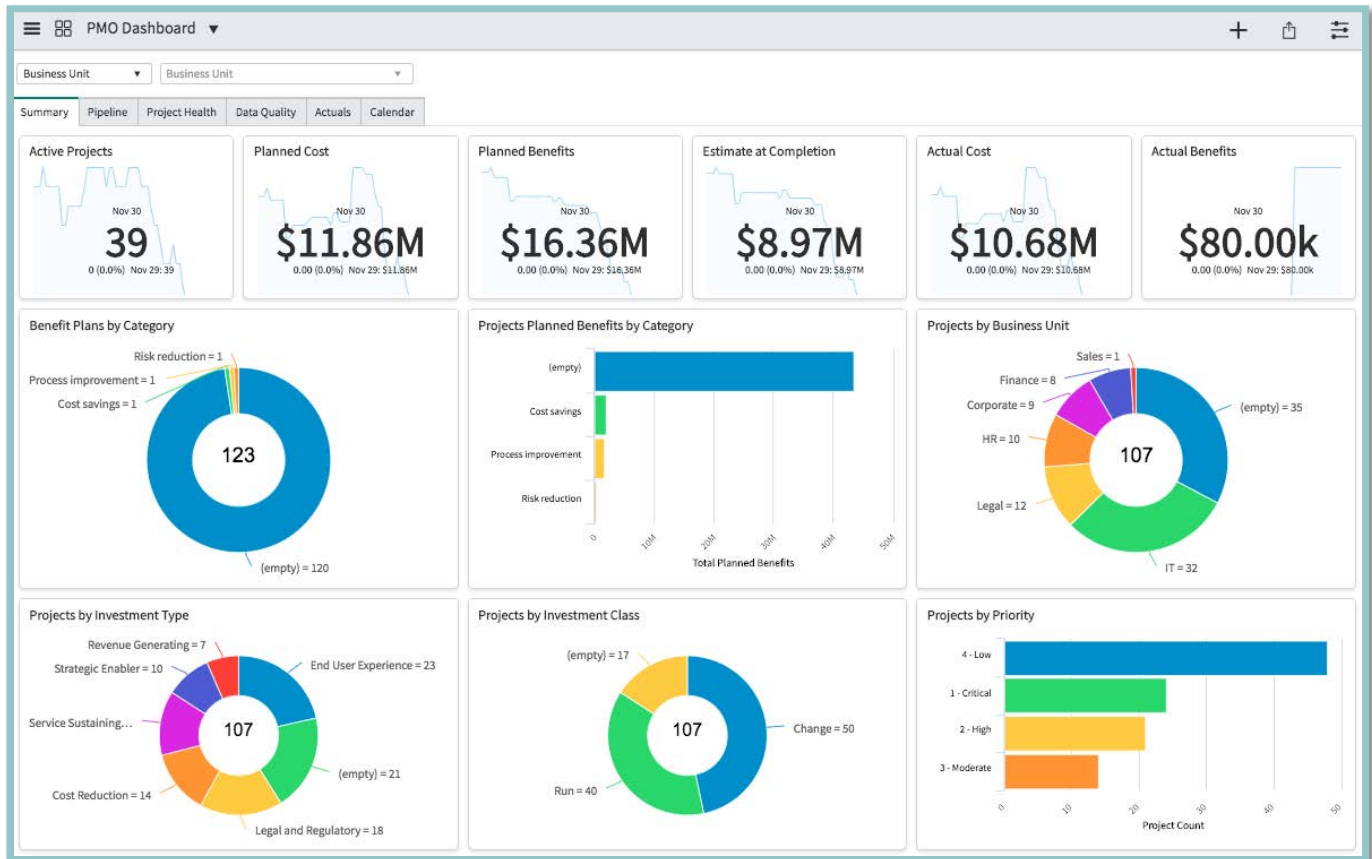
Figure 10: PMO Dashboard - Summary
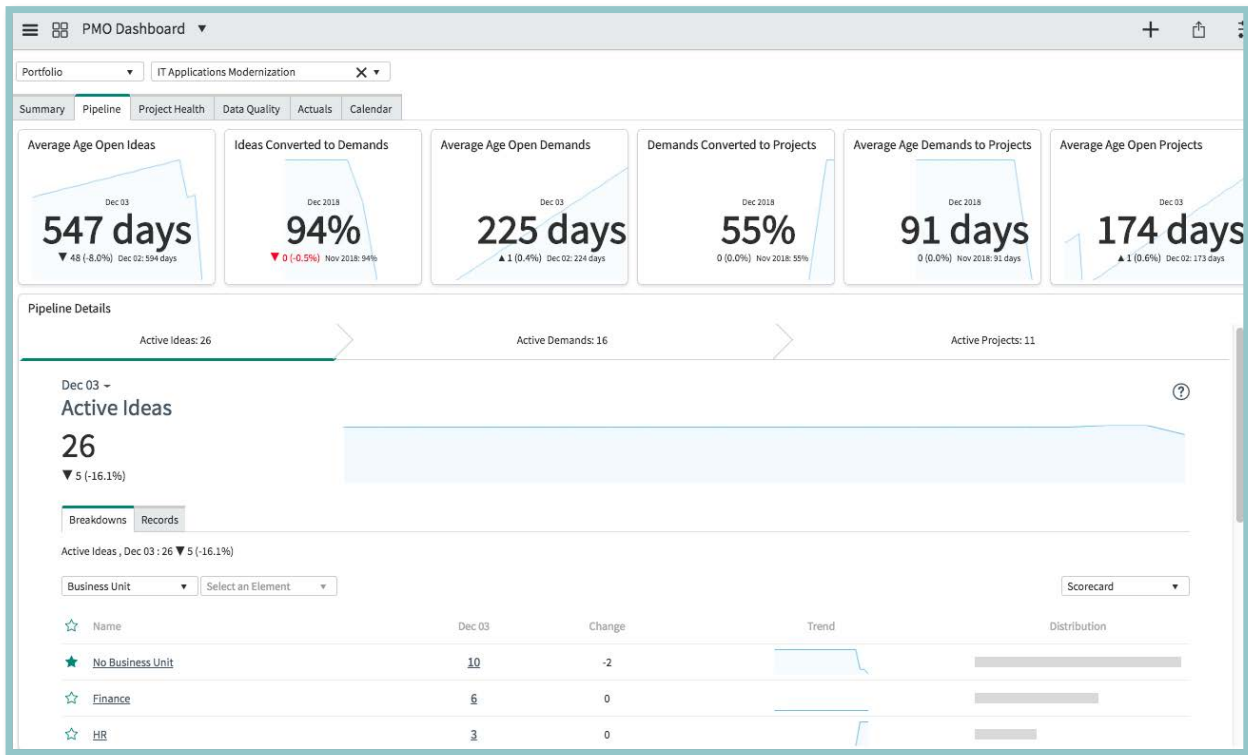
Figure 11: PMO Dashboard - Pipeline
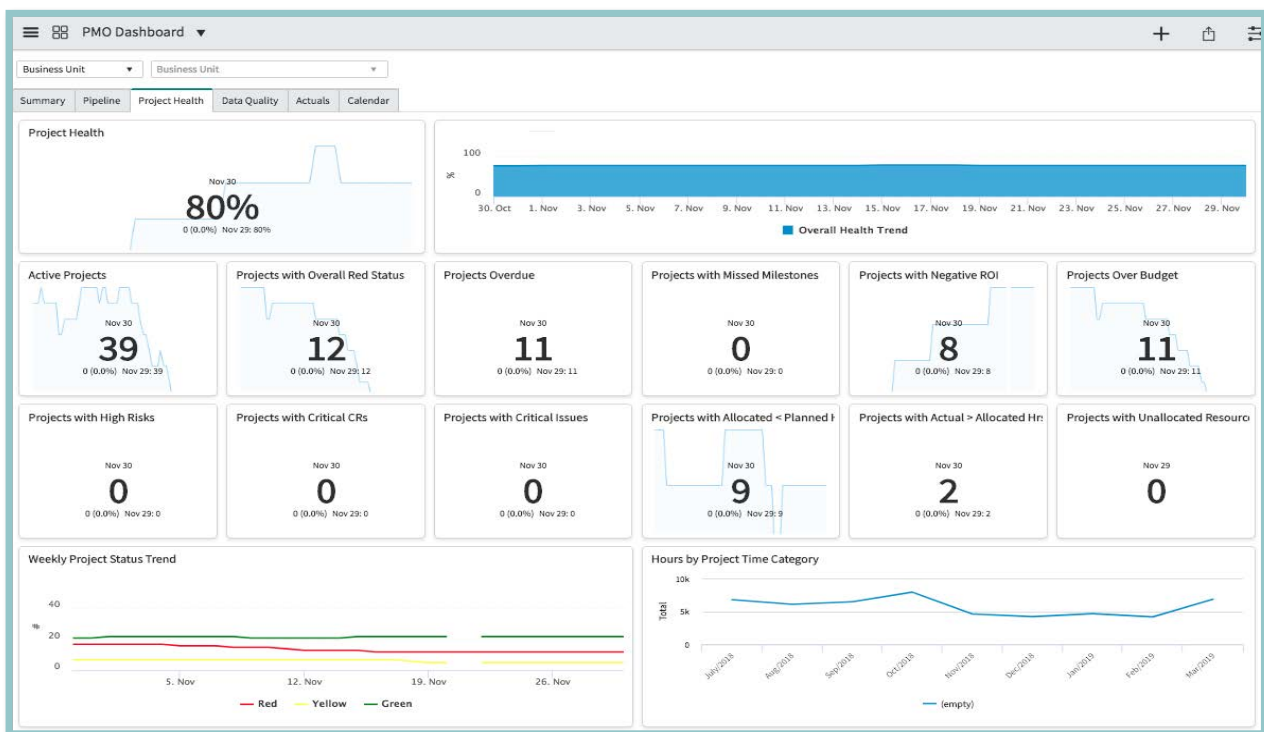
Figure 12: PMO Dashboard – Project Health
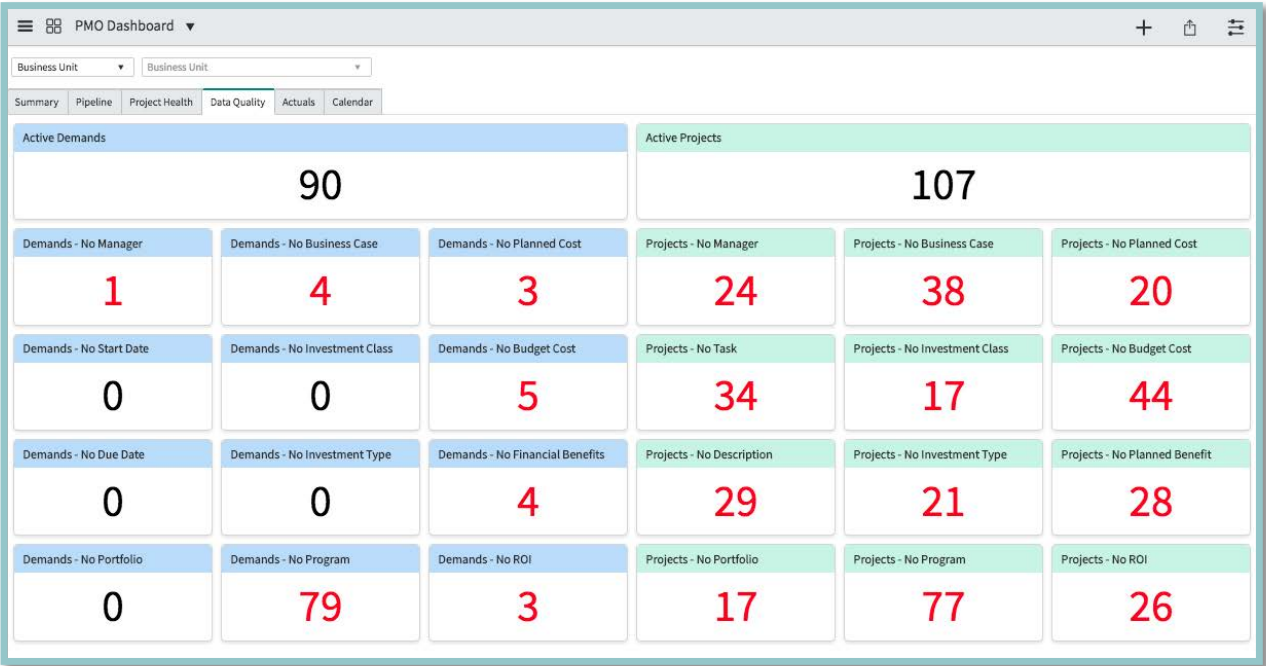
Figure 13: PMO Dashboard – Data Quality

Figure 14: PMO Dashboard - Actuals
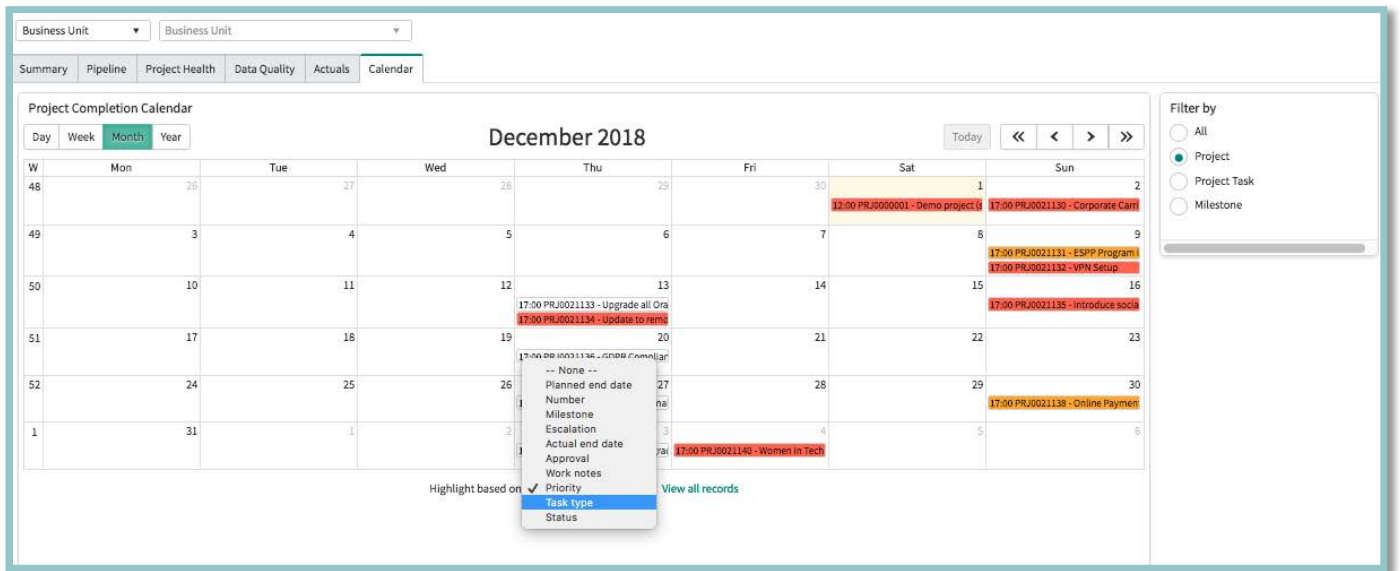
Figure 15: PMO Dashboard - Calendar

Investment Portal

Investment Portal: Track progress of inflight work for different personas, C level executive, program manager, project manager, business application, owner, etc. It allows flexible and configurable views to manage health status, timeline, costs at a glance.
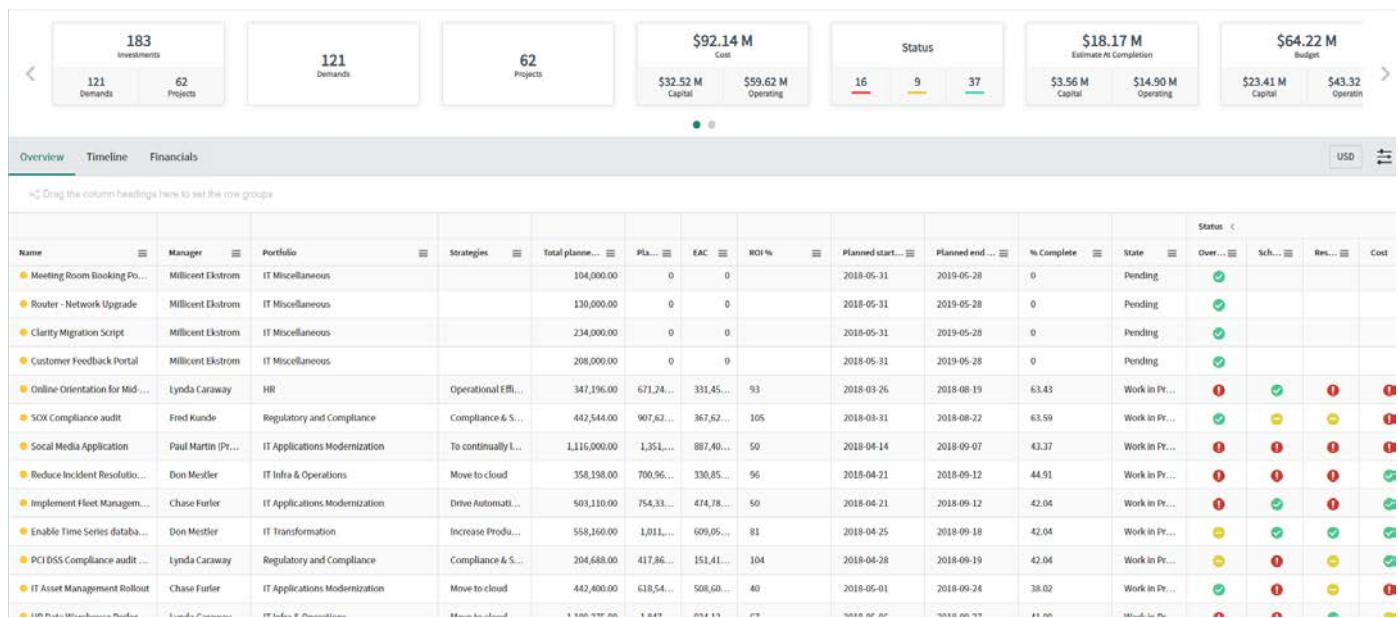
Figure 16: Investment Portal – Overview
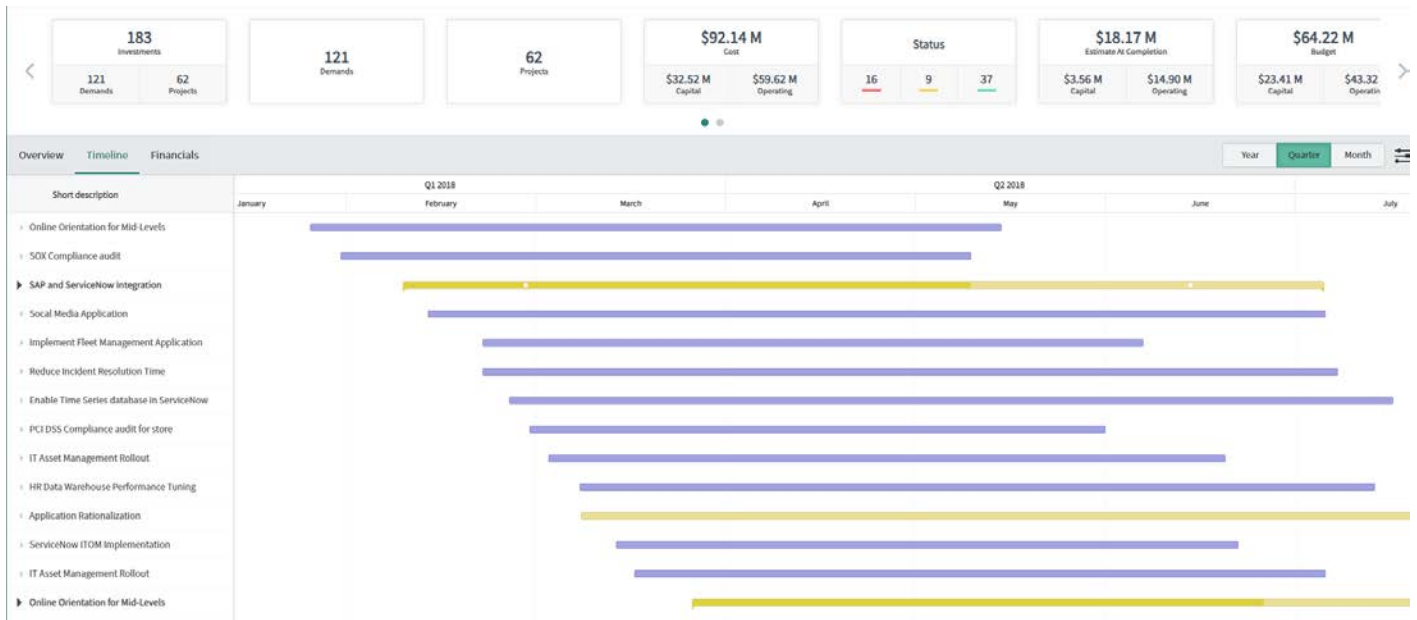
Figure 17: Investment Portal - Timeline

Figure 18: Investment Portal - Financials

Reports and Homepages

There are several default reports in ServiceNow that can be used to generate charts, can be published to a URL, or can be run and distributed at scheduled intervals. Users can also create custom reports. See Creating Reports for more information.

In addition to reports, each user can create a personal homepage and add gauges containing up-to-the-minute information about the current status of records in ServiceNow tables. See Customizing Homepages for details.

Forms and Views

Project administrators can customize the layout for any form view and can also configure the columns in any list to display the desired information for a particular type of user. Determine what information users need to see and create views for forms and lists, accordingly.
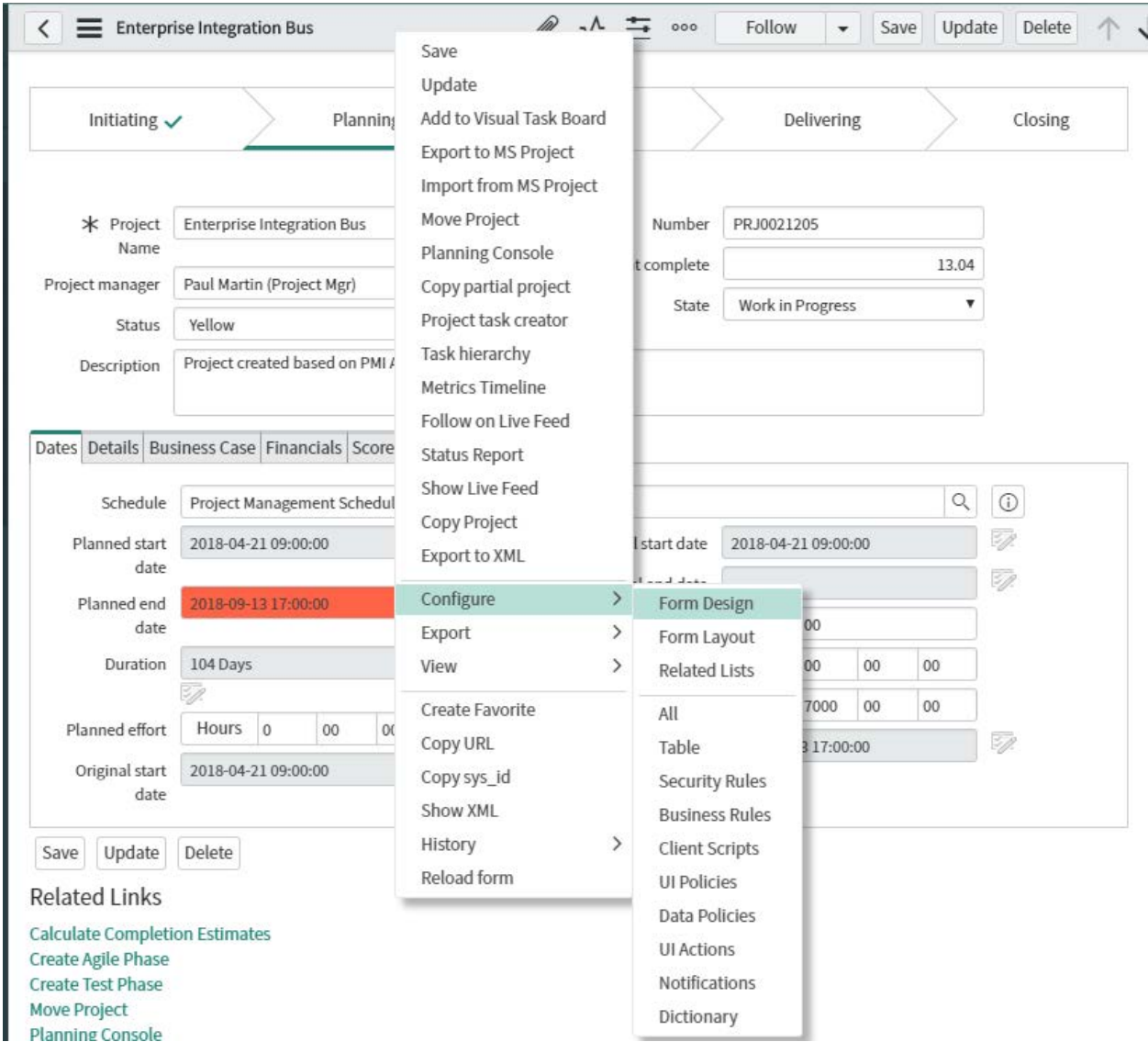
Figure 19: Configure Form
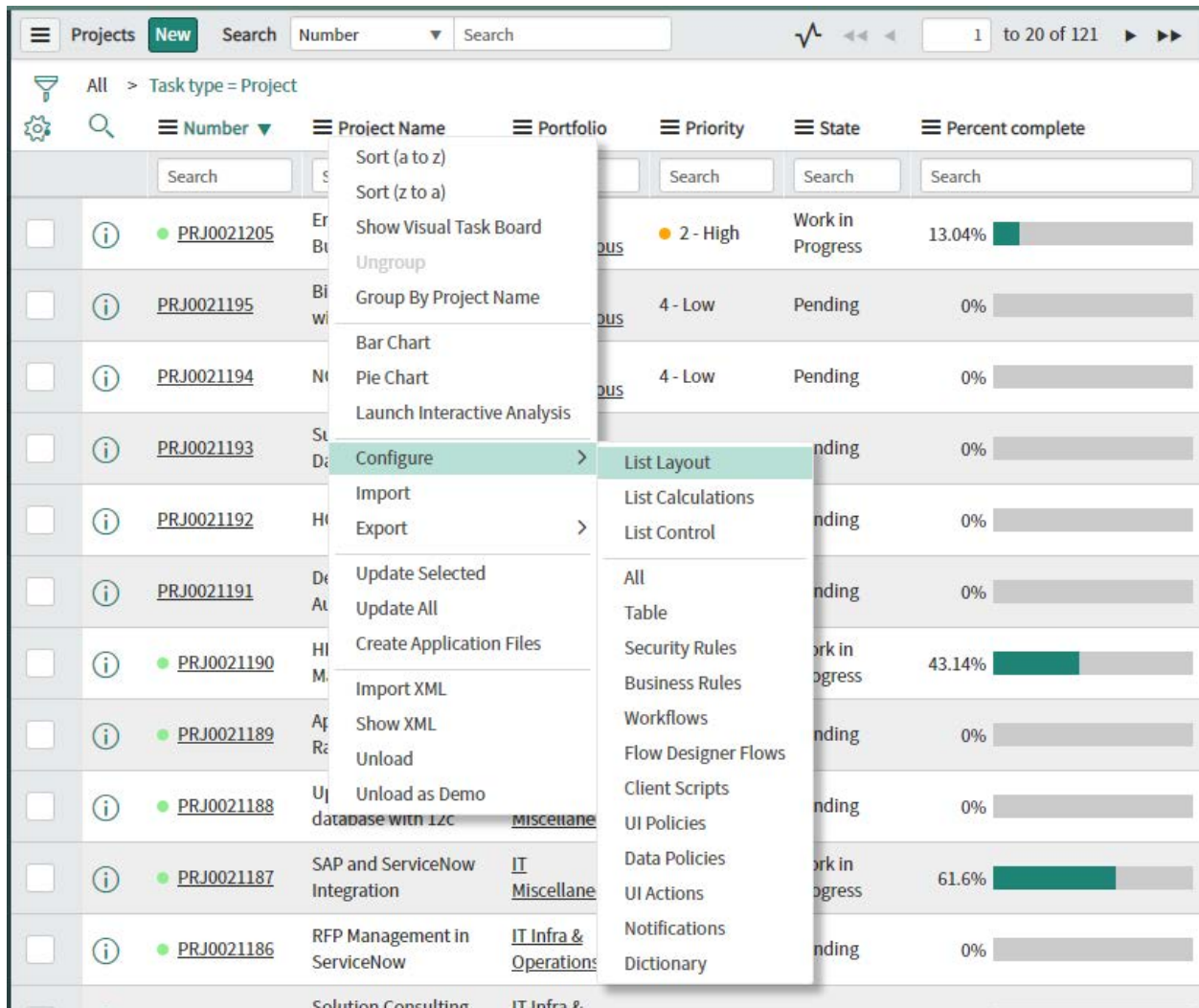
Figure 20: Configure List

Workflows

Workflows should be used when possible to automate, streamline, and help enforce the project methodology. This includes any processes that are unique to the organization. Examples are the project request process and project milestones or gates that may require review, approval, and other processes that could be automated.

See Flow Designer and Creating a Workflow for more information.

Mobile Access

Project managers and project team members can use mobile access to the project to more regularly update project tasks to help keep project status current. Mobile access provides a mechanism for stakeholders to easily access project status. Determine what type of mobile access is needed to view specific project data, to add an issue to a project, to update project task status, or simply to view up-to-the minute project status. Typical access includes:

- Allowing end users to report their time into the PPM system from mobile devices.

- Allowing project managers to approve items such as timecards and project ideas or requests from mobile devices.
- Allowing business managers or project managers to access and view reports and dashboard information from mobile devices.

See Now Mobile app for more information.

Project Communication and Collaboration

Review how project collaboration is accomplished and whether everyone utilizes the same tools for project collaboration or if there are several tools. If several tools are used, consider how this information can be collected to make sure everyone is informed who needs to be. One option is to use the ServiceNow social networking and collaboration capabilities to augment or replace existing tools. ServiceNow offers issue tracking, email integration, and live feed discussion threads to help the project team collaborate effectively. When applied in the PPM system, these features can significantly increase end user adoption, which is key to the success of the PPM implementation.

See Social IT for more information.

Notifications

Appropriate notifications should be created to help keep the project on track and to automatically alert the team members, reviewers, and approvers about issues and risks. Examples include email notifications when a project request, project task, or deliverable needs review and approval; live feed group notifications based on conditions; dashboard gauges indicating tasks or other records that require attention; and scheduled reports to the project sponsor or other stakeholders.

Timecards

Project team members can easily update time worked on individual tasks or update many tasks at once via the native in-line editing feature. Optionally, the Timecard application can be used to submit timecards on a periodic basis.

Timecards are filled using the Time Sheet Portal which is available to all PPM users.

Timecards automatically create expense lines using labor rate cards, timecards are rolled up to project actual, they can be linked to resource plans and to cost plans to roll up actual hours and costs information.

Approval process applies to timecards, to validate or reject them after submission.

See Time Cards, Rate Models, Time Sheet Policies for more information.

Project Costing

Determine the appropriate project costing features to enable estimating and tracking the costs associated with projects, such as:

- Estimating group resource costs during project planning.
- Tracking the actual cost of each user resource for a project.
- Tracking actual project task costs from time cards and other project expenses.
- Allocating project costs to the business, using Expense Lines and Expense Allocations.

- Representing project costs to the project's affected CIs.
- Rolling up actual task expenses to parent tasks and the project record.

Project Portfolio Management

The objective of project portfolio management is maintaining the optimal mix of projects or investments to support the organization's overall welfare and success. Project portfolio management groups related projects and configures progress data for presentation. Determine what types of portfolios are to be maintained.

ITBM addresses all enterprise maturities:

1 List portfolios and projects, visibility and reporting

- No duplicate project, no "mystery" project, no side project, all activity is inventoried.
- Investment Portal is mainly used to provide this visibility.

2 Build next year budget, manage the year budget

- Manage portfolios, prepare, build and approve yearly budgets
- Portfolio Workbench is used

3 Build budget, track forecast

- Manage portfolios, prepare, build and approve yearly budgets
- Track and promote forecasted budgets during the year
- Portfolio Workbench is used

Portfolios and programs both can manage demands and projects in a flexible structure. To enforce demands and projects of a program being part of the same portfolio is an option. ITBM doesn't manage portfolio hierarchies, nor program hierarchies.

Identify the types of gauges required for homepages to deliver at-a-glance reports for management. In ServiceNow, status information about projects presented in a portfolio view is abstracted from the raw data and is not dynamic. A read-only portfolio Gantt chart is also used to view and compare projects in a portfolio.

Portfolio Projects

Portfolios should contain related projects. Once the portfolio is created, determine the related or aligned projects that should be added to it.

Portfolio View

Determine what presentation criteria should be captured for evaluation, including:

- Milestones
- Risks

- Costs
- ROI %
- Staff
- Scope
- % Complete

Portfolio Process

The budget cycle in PPM using the Portfolio Workbench is:

- The fiscal periods must be created prior to start the process
- The Fiscal Period is opened
- The portfolio target is set for the opened Fiscal Period
- The Fiscal Period is closed
- Demand and project cost plans are entered, to represent the requirements
- Demands and projects are selected in the Portfolio Workbench
- The portfolio is confirmed, which will approve selected demands, on option can be set to automatically convert approved demands to projects
- Budget amounts can be negotiated and adjusted
- Budget period/Forecast period is opened
- The portfolio budget/forecast is promoted
- Budget period/Forecast period is closed
- The action to unlock cost plans is run

Resource Management

Introduction

The Resource Management process is used to forecast and track the demand for and supply of human resources within an organization.

The concepts described in this guide are to be used as a baseline for successful Resource Management (RM) within the ServiceNow Project Portfolio Management product. This guide does not contain a specific set of instructions for every RM scenario; rather it seeks to define a procedural mechanism which organizations can utilize as a starting point for the refinement of their own resource management process. This guide is aligned with out of the box (OOTB) functionality

Overview

The Resource Management process manages the demand for (load placed on an organization by various work items) and supply of (capacity constraints in an organization) resources. Resource management enables resource requesters, such as project managers, demand managers and change managers, to create resource plans, request resources and analyze resource demand, availability, and utilization.

The Resource Management process can be used for the following purposes:

- Defining resource availability schedules.
- Creating resource plans which specify specific needs for group or user resources. These plans are done at the demand, project, or itemized task (change request, Agile scrum task, project task, operational task, etc.) level.
- Verify resource availability and make changes to resource plans prior to requesting resources.
- Maintaining work calendar to ensure that any non-working time, such as vacations or holidays, are visible to their resource manager.
- Viewing availability, existing allocations, and utilization for the requested resources and making allocations based on resource availability.
- Performing what-if analysis by changing resource plan dates, resources, requested hours and proposed allocations to analyze impact on resource utilization and availability.

Process Description

The Resource Management process tracks resource requests and allocations as well as resource availability and utilization.

A resource requester is required to forecast their resource requirements by creating and working with the Resource Manager to maintain resource plans. Once complete, the resource requester is then able to submit their resource plans for approval to the designated resource manager(s). The requests then go through a negotiation stage, whereby off-system negotiations make take place between the requester and resource manager. The resource manager can then allocate named resources and confirm the request(s) or reject the request(s). If approved, the resource requester can assign the task(s) to the resource(s) and track it to completion.

Process Goal

The primary goal of the Resource Management process is to ensure that the best possible decisions on resourcing of organizational demands can be made, by providing accurate information on resource demand and capacity.

Process Objectives

The objectives of the resource management process are to:

- Ensure that human resources are deployed as efficiently and effectively as possible.
- Provide a single source of truth that both resource requesters and resource managers can use as guidance when making and approving resource requests.
- To provide a forecast on the volume and type of resources that will be required to execute the organizations portfolio of work.
- To ensure that the most appropriately skilled resources are assigned to complete the work requested.
- Provide Resource Managers visibility on what their resources are working on now and what they are planned to be working on in the future.

Relationships with other Processes

Process	Relation Description	Input	Output
Demand Management	Resource Plan requirements identified from within a Demand. The resource plans are copied to the project/enhancement/request upon creation.	X	
	Notification of hard and soft booked allocations following resource plan approval.		X
Project Management	Resource planning, resource plan updates and allocation requirements identified from within a Project.	X	
	Notification of hard and soft booked allocations following resource plan approval		X
Portfolio Planning	Allocation requirements and resource plan updates identified during portfolio planning activities	X	
Cost Management	Provision of CI-related cost information to enable calculation of resource costs and display them in resource plans.	X	
Change Management	Resource plan updates resultant from the approval of a requested Change.	X	
Timecard Management	Timecards refer to the Resource Plan they correspond to. Useful for tracking the accuracy of and providing feedback around resource estimates.	X	X

Principles and Basic Concepts

Definitions

The following definitions are used –

- Resource Availability: the time a resource is committable, operable and useable upon a demand.

- Resource Capacity: the quantity and quality of resources availability.

- Resource Demand: the desire for an available resource with the appropriate skill and capacity.

- Resource Calendar: used to reflect working hours, holidays, vacations, and other committed time for a resource.

- Soft Allocation: A temporary resource allocations for the requested users where the final dates and durations are not yet known or are not yet ready for resources to be allocated (e.g. a resource request for a Demand).

- Hard Allocation: A firm commitment between the requester and resource manager for resources between a specified set of dates for a particular amount of time. The resources allocated are no longer available for other requests during the allocated times.

- Person days: Hours are calculated as: Total number of person days * Average Daily FTE Hours/Hours Per Person Day. For example, the Average Daily FTE Hours/Hours Per Person Day is 8 hrs for a group, and you specify the person days as 3. Then planned hours = 8 * 3 = 24 hours.

- FTE: An equivalent value that represents full-time work. When the request type is FTE, planned hours are calculated as: Average Daily FTE * number of working days in resource plan * the FTE value. The average daily FTE hours are specified in User and Group records. If there is no value specified at User or Group record, the average daily FTE hours is taken from the Default Average Daily FTE property.

- The number of working days is calculated based on the users' schedule for a user resource or the default schedule for group resources. The default schedule is taken from Default Schedule Name property.

Policies

Resource management policies are required to guide all staff in the behaviors needed to make resource management effective.

Policy statements will be very dependent on the culture of the organization. Here are some examples:

- All resource requests must come through or be formalized using the Resource Management system.
- Resource requesters must not specify an individual resource by name when making resource requests.
- Resource managers must respond to requests for their resources in a timely manner.
- Resource requesters must ensure that their requests are kept up to date and as closely as possible reflect the true demand for resources as it is currently understood.

States

Resource Plans are tracked throughout their lifecycle (see State Description section below) to support ease of handling and reporting. In ServiceNow, the state of a resource plan indicates where it is in relation to the overall request lifecycle and helps determine what the next step in the process might be. The state is a read-only field, and the value will be changed based on decisions of the requester and approver.

1. Planning: Planning is the default state when a resource requester creates a resource plan. Any plan in this state can be edited. Requested Allocations are created when a resource plan is in Planning state.

   When a resource requester asks for a change to a plan that was already submitted, the plan reverts to the Planning state.

   The resource plans are created in the Planning state by default.

2. Requested: The resource requester submits a resource plan for resource managers review by clicking Submit. The resource plan then moves into the Requested state. Resource managers confirm and allocate resources or reject the plan, and finally close the plan.

   The resource requester can request a group, specific users in a group, or a specific user to work on the selected task. After you submit the plan for review, a resource manager can confirm, and then allocate some or all the requested users.

   If more than one user or groups are required by the task, multiple resource plans can be created for the given task.

3. Rejected: The resource manager rejects a resource plan by clicking Reject. The resource plan then moves into the Rejected state. Rejected plans stay in that state until changed, the requester can re-request the resources.

4. Confirmed: After the plan is requested, the resource manager can block/confirm the resources for future projects and demands. The resource plan then moves into the Confirmed state. Only a resource manager can modify the plans in Confirmed state.

   Soft allocations are created when the resource plan moves to the Confirmed state.

5. Allocated: After the plan is confirmed, the resource manager can review the plans, view availability, change resource preferences and perform the resource allocation. Then the plan becomes allocated. Once a plan is in the Allocated state, it can only be cancelled, completed, or modified by the resource manager.

   Soft allocations are converted to hard allocations when the resource plan moves to the Allocated state.

   The user can also set a plan to the Allocated state directly from the Requested state using Confirm and Allocate option.

   The resource manager can edit and delete even a past dated resource allocation when no actual hours are recorded against the allocation record. When a user submits a timecard, upon approval of the timecard, actual hours are updated for the allocation record.

6. Completed: After all associated tasks and projects are complete or cancelled, an Allocated resource plan can be completed. This deletes all the resource allocations for the resource plan post the completion date.

7.   Cancelled: An allocated plan can be cancelled if the allocations are no longer required. This removes all future allocations. The past allocations are not cancelled or removed. A cancelled plan can be brought back to the Planning state if it has no past allocations.

Resource plans in either of the Confirmed or Allocated states can be Cancelled. When a confirmed resource plan is cancelled, all soft allocations are deleted.

When a resource requester wants to change a plan that was already submitted for review (in the Requested or Confirmed state but not yet allocated), the requester can request a change. If approved and actioned, the plan then moves back to the Planning state.

Process Roles

Each role is assigned to perform specific tasks within the process. Within the process, there can be more than one individual associated with a specific role. Additionally, a single individual can assume more than one role within the process, though typically not at the same time. Depending on the structure and maturity of a process, all roles described may not exist in every organization.

Role	Description
Resource Management Process Owner	A RM process owner is a stakeholder with the ability and authority to ensure the RM process is rolled out and used correctly and consistently across the organization. Responsible for: • Defining the overall mission of the process. • Establishing and communicating the RM process mission, goals, and objectives to all stakeholders. • Resolving any cross-functional (departmental) issues. • Ensuring consistent project tasks within execution of the process across the organization. • Reporting on the effectiveness of the process to senior management. • Initiating any process improvement initiatives.
Resource Manager	Resource managers ensure the efficient and effective deployment of an organization's resources, as needed. Resources include financial resources, inventory, human skills, production resources, or information technology. Responsible for: • Timely response to resource requests. • Ensuring that available resources are used efficiently to complete the project or project tasks within specified deadlines. • Tracking supply of resources. • Maintaining the resource demand forecast. • Assigning resources to resource requests. • Tracking resource utilization.
Resource Requester	Resource requesters are responsible for working with Resource Managers in the planning for and assignment of resources to their request. Responsible for: • Creation and maintenance of resource plans. • Submission of resource plans. • Negotiation of resources with respective resource managers. • Assignment of approved resources to tasks. • Ensuring resources that are not fully utilized are released for allocation to other demands.
Resource	Resources are the individuals both being requested and allocated in this process. Responsible for:

Role	Description
	• Ensuring that their availability for work is kept up to date.

RACI Matrix

Roles and responsibilities are assigned to specific process activities.

ID	Activities	Resource Requester	Resource Manager	Demand Manager	Project Manager	Change Manager	Portfolio Planner
RSM 1.0	Create and Submit Resource Plans						
RSM 1.1	Confirm Resource Requirements	A/R	C	C	C		
RSM 1.2	Select Required Resource Group	A/R					
RSM 1.3	Select Named Resource	A/R					
RSM 1.4	Select Group Member Preference	A/R					
RSM 1.5	Determine Allocation Type	A/R					
RSM 1.6	Create Resource Plan	A/R					
RSM 1.7	Update Resource Plan	A/R	C		C	C	
RSM 1.8	Submit Resource Plan for Review	A/R	I				
RSM 2.0	Fulfil Resource Request						
RSM 2.1	Confirm Resource Availability		A/R				
RSM 2.2	Reject Resource Request	C	A/R				
RSM 2.3	Assign Resources	C	A/R				
RSM 2.4	Confirm Resources		A/R				
RSM 2.5	Allocate Resources		A/R				
RSM 2.6	Communicate Resource Request Outcome	C	A/R	I	I	I	I
RSM 3.0	Maintain Resource Plans						
RSM 3.1	Identify Re-planning Requirements	A/R	C		C		
RSM 3.2	Confirm Hard Bookings	A/R	C				
RSM 3.3	Review Resource Plan	C	A/R		C	C	

ID	Activities	Resource Requester	Resource Manager	Demand Manager	Project Manager	Change Manager	Portfolio Planner
RSM 3.4	Delete Unused Allocations		A/R				
RSM 3.5	Update Resource Plan		A/R				
RSM 3.6	Delete Resource Plan		A/R				
RSM 3.7	Cancel Resource Plan		A/R				
RSM 3.8	Complete Resource Plan		A/R				
R: Responsible, A: Accountable C: Consulted, I: Informed							

Resource Management

Process Overview

RESOURCE MANAGEMENT - PROCESS OVERVIEW

RELATED PROCESSES

- Demand Management
- Project Management
- Change Management
- Demand Management
- Portfolio Planning

RESOURCE REQUESTER

RSM1.0 Create and Submit Resource Plans

New Plans

RSM3.0 Maintain Resource Plans

RESOURCE MANAGER

RSM2.0 Fulfill Resource Request

Updates to Existing Plans

Re-Planning Requirements
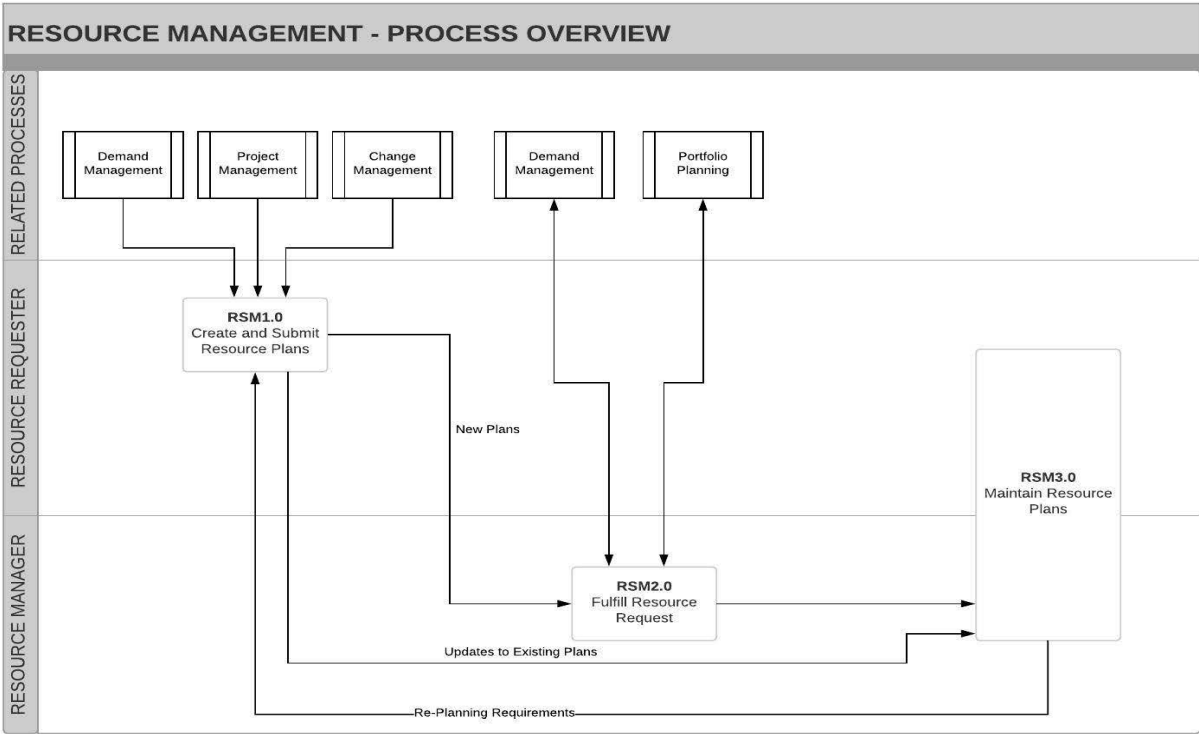
ID	Tasks	Resource Stage	Description
RSM 1.0	Create and Submit Resource Plans	Planning Requested	• Resource requesters create resource plans for the types of resources they require to complete the work. • Resource requesters ensure their plan is complete and correct. • If an existing resource plan requires modifying, the requester can adjust their resource plan, before re-submitting. • The resource requester formally submits their resource plans for review and approval by the relevant resource managers.
RSM 2.0	Fulfil Resource Request	Requested Confirmed Allocated Rejected	• Resource manager receives the request. • Resource manager compares the resource plan vs the current resource availability alongside all other competing demands for their resources. • Resource manager and requester can negotiate and adjust the request. • A decision on how to proceed with the request is made. • Resource manager can soft book the resources by confirming the request. • Resource manager can create hard-book allocations by allocating named resources to the request. • Resource manager can reject the request. • Resource Manager communicates fulfilment actions to impacted parties
RSM 3.0	Maintain Resource Plans	Completed Cancelled	• Resource Requester reviews their resource plan and identifies re-planning activities or hard-booking requirements • Resource Manager reviews plans based on feedback from resource plan stakeholders and determines Resource Plan impact. • Resource request is completed once no further action is required. • Resource request is cancelled if the resources are no longer required.

Create and Submit Resource Plans

RESOURCE MANAGEMENT - CREATE & SUBMIT RESOURCE PLANS

ID	Task	Primary Role	Description	Input	Output
			Link from *Project Management* operational process to create a project resource plan	• Project Resource Requirements	
			Link from *Enhance Demand (DMD 2.0)* process to create a demand resource plan	• Demand Resource Requirements	
RSM 1.1	Confirm Resource Requirements	Resource Requester	Confirm resource requirements from within a project, demand, enhancement or change. Depending on the requirement, choose to request a specifically skilled named resource or one or more resources from a group (e.g. Analysts).	• Project Resource Requirements • Demand Resource Requirements • Change Management Resource Requirements	• Resource Requirements
RSM 1.2	Select Required Resource Group	Resource Requester	If a resource is required from a group of resources, specify the specific group. For example, the Resource Plan may require anyone who has Analyst skills - in this instance specify that some/all resources are required from the 'Analyst' group.	• Resource Requirements	• Resource Group
RSM 1.3	Select Group Member Preference	Resource Requester	Resource groups can be structured as both functional and matrix structure. Identify which group members are required. An example of functional would be 'Analysts', from which the requester may require one member. An example of matrix structure could be 'Agile Pod 1', where all members of this group are required to complete a piece of work.	• Resource Group	• Group Member Preference
RSM 1.4	Select Named Resources	Resource Requester	If a specific named resource is required, request the resource by	• Resource Requirements	• Named Resources

ID	Task	Primary Role	Description	Input	Output
			name. The ultimate decision over whether this specific request is at the discretion of the Resource Manager.		
RSM 1.5	Determine Allocation Type	Resource Requester	Determine specific allocation type, e.g. week, month or the entire duration of the assignment. The option selected determines the level of detail available to the requester for levelling activities when finalizing the resource plan.	• Named Resources • Resource Group	• Allocation Type
RSM 1. 6	Create Resource Plan	Resource Requester	Based on the inputs determined in RSM 1.1 to RSM 1.6, create initial version of the Resource Plan. When appropriate, assign costs to elements of the Resource Plan. Based on the selections made in the resource plan, the requested allocations are automatically generated by ServiceNow.	• Resource Requirements • Named Resources • Resource Group • Group Member Preference • Allocation Type • Cost Information	• Resource Plan • Requested Allocations
			Link from *Maintain Resource Plans (RSM 3.0)* to update an existing Resource Plan for re-submission following re-planning activities	• Confirmed Resource Requirements	
			Link from *Change Management* operational process to update an existing Resource Plan based on the requirements of an approved Change Request	• Change Request	
			Link from *Project Management* operational process to update an existing Resource Plan based on changes to a project scope	• Project Resource Requirements	

ID	Task	Primary Role	Description	Input	Output
RSM 1.7	Update Resource Plan	Resource Requester	For new Resource Plans, continue to work on the resource plan until the request is finalized For existing Resource Plans, perform required updates based on inputs from Change/Project Management stakeholders and feedback from the Resource Manager. Based on the modifications made to the resource plan, the requested allocations are automatically updated by ServiceNow.	• Project Resource Requirements • Re-planning Information • Change Request	• Resource Plan [Updated] • Requested Allocations [Updated]
RSM 1.8	Submit Resource Plan for Review	Resource Requester	Following the finalization of the resource plan, submit the plan to the applicable resource manager of the resource(s) being requested. Once requested, the resource plan is locked for editing by the resource requester.	• Resource Plan	• Resource Plan [Finalized] • Requested Allocations [Finalized]
			Link to *Fulfil Resource Request (RSM 2.0)* so that the Resource Manager can review the Resource Plan		• Resource Plan • Requested Allocations

Fulfill Resource Request

RESOURCE MANAGEMENT - FULFILL RESOURCE REQUEST

ID	Tasks	Primary Role	Description	Input	Output
			Link from *Create and Submit Resource Plans* (RSM 1.0) so that the Resource Manager to review the Resource Plan	• Resource Plan • Requested Allocations	
RSM 2.1	Confirm Resource Availability	Resource Manager	Receive notification from either the Resource Requester or by viewing the resource plans awaiting approval. This can be done through the requested module or the Resource workbench, both available in the Resource application. See Section 4 – Resource Workbench for more information. View the resource plan to view the resource(s) and quantity being requested. Weigh up the request against the capacity of the resources they manage, as well as other competing demands.	• Resource Plan • Requested Allocations	• Reviewed Resource Plan
RSM 2.2	Reject Resource Plan	Resource Manager	If no resources are available that will meet the requesters requirements, the resource manager can reject the resource plan.	• Reviewed Resource Plan	• Rejected Resource Plan •
RSM 2.3	Assign Resources	Resource Manager	If there are resources available, determine whether to soft-book or hard-book the resource(s). Soft booking a resource (a tentative booking) will set the time aside for a future effort that may not be fully approved to commence or has dates that may fluctuate. A hard booking (a confirmed booking) is used when planning is complete, and work is ready to start. When hard booked, a resource is not	• Reviewed Resource Plan	• Resource Assignments

ID	Tasks	Primary Role	Description	Input	Output
			available for other plans during the allocated time.		
		Automated	Link from *Portfolio Planning* operational process because resources associated with a Resource Plan require confirming	• Resource Plan • Resource Assignments	
		Automated	Link from *Project Management* operational process because resources associated with a Resource Plan require confirming	• Resource Plan • Resource Assignments	
RSM 2.4	Confirm Resources	Resource Manager	If there are resources available to meet the needs of the requester, but the work is in the future or not finalized, confirm the resources. Confirming the request creates a soft booking for the resource(s), which is a temporary allocation and does not create any calendar events. When the request is confirmed, ServiceNow will create a copy of the resource allocations into the requested allocations automatically. The requested allocations will have a booking type of Soft. Determine if the confirmed resources require allocating	• Resource Plan • Resource Assignments	• Soft Booked Resources
RSM 2.5	Allocate Resources	Resource Manager	Allocating the request creates a hard booking for the resource(s), which is a contracted commitment between the resource manager and requester. Once hard booked, a resource cannot be booked to other work. If the resources had only been confirmed (soft-booked), and the	• Resource Plan • Resource Assignments • Soft Booked Resources	• Hard Booked Resources

ID	Tasks	Primary Role	Description	Input	Output
			resource plan is now ready to be allocated, the resource manager can move the request from the confirmed to allocated state. This will convert the previously made soft-booking into a hard-booking. Once the request is confirmed, ServiceNow will either create a copy of the resource allocations into the requested allocations automatically or will update the previously created soft bookings. The requested allocations will now have a booking type of Hard		
RSM 2.6	Communicate Resource Request Outcome	Resource Manager	When appropriate, communicate the result of the Resource Request to the Requester and impacted stakeholders.	• Hard Booked Resources • Soft Booked Resources • Rejected Resource Plan	• Resource Plan Status
			Link to *Assess Demand (DMD 3.0)* process to provide notification of resources allocated to the Resource Plan associated with the Demand.		• Resource Plan Status
			Link to *Project Management* operational process to provide notification of resources allocated to the Resource Plan associated with a Project.		• Resource Plan Status
			Link to *Portfolio Planning* operational process to provide notification of resources allocated to the Resource Plan associated with a Portfolio Plan.		• Resource Plan Status

ID	Tasks	Primary Role	Description	Input	Output
			Link to *Change Management* operational process to provide notification of resources allocated to the Resource Plan associated with a Change Request.		• Resource Plan Status

Maintain Resource Plans

MAINTAIN RESOURCE PLANS

ID	Tasks	Primary Role	Description	Input	Output
			Event Triggers to review existing Resource Plans. This may be resultant from a Project Review meeting or analysis of financial reports	• New Resourcing Requirements	
RSM 3.1	Identify Re-planning Requirements	Resource Requester	Determine if any resource re-planning is required. For example, if a piece of work has been delayed and the resource timeframe has changed, initiate actions to request an extension to a resource plan in the allocated state.	• New Resourcing Requirements	• Confirmed Resource Requirements
			Link to *Create and Submit Resource Plans (RSM 1.0)* to update an existing Resource Plan for re-submission following re-planning activities		• Confirmed Resource Requirements
RSM 3.2	Confirm Hard Booking	Resource Requester	Based on new resourcing requirements, initiate request to convert a previously made soft-booking into a hard-booking.	• New Resourcing Requirements	• Hard Booking Request
			Event Triggers to review existing Resource Plans based on inputs from impacted stakeholders such as Project Managers. These triggers include situations when resources require assigning to multiple projects, increased project scope requiring movement of resources from different Resource Plans	• New Resourcing Requirements	
RSM 3.3	Review Resource Plan	Resource Manager	Review existing Resource Plan and based on the event trigger, determine the required next steps as follows: 8. Complete Resource Plan and		• Resource Plan Requires Completing • Resource Plan Requires Updating

ID	Tasks	Primary Role	Description	Input	Output
			delete unused allocations 9. Update Resource Plan 10. Cancel Resource Plan 11. Delete Resource Plan		• Resource Plan Requires Cancelling • Resource Plan Requires Deleting
RSM 3.4	Delete Unused Allocations	Resource Manager	Before marking a resource plan as complete, consult with the resource requester prior to deleting any un-used allocations. If the resource plan is completed with unused allocations these will remain un-used and cannot be utilized elsewhere.	• Resource Plan Requires Completing	• Unused Allocations Deleted
RSM 3.5	Update Resource Plan Allocations	Resource Manager	If required, make changes directly to the resource plan. This may be the result of a conversation between the resource manager and requester where it is quicker and simpler for the resource manager to adjust the request. Updating the Resource Plan will update all associated hard and soft bookings. Note: only update the resource plan in the allocation state if there are no past dated allocations. If there are past dated allocations the changes will not be processed, and the plan will be permanently put into the cancelled state.	• Resource Plan Requires Updating • Hard Booking Request	• Resource Plan Updated
RSM 3.6	Delete Resource Plan	Resource Manager	Perform actions to delete the Resource Plan if no longer required. Deletion of the resource plan will also result in the	• Resource Plan Requires Deleting	• Resource Plan Deleted

ID	Tasks	Primary Role	Description	Input	Output
			automatic deletion of the associated resource allocations.		
RSM 3.7	Cancel Resource Plan	Resource Manager	If the resources being requested are no longer needed, the resource manager can cancel a resource plan that is in the confirmed or allocated states. If the resource plan has allocations in the past, the request will be permanently set to cancelled and cannot be re-used. When a resource plan is cancelled, all future allocations that relate to it are also automatically cancelled. If the cancelled resource plan does not have allocations in the past, the resource requester can choose to re-plan using the same resource plan. Doing this will put the plan back into the Planning state where updates can be made, and the plan re-requested	• Resource Plan Requires Cancelling	• Resource Plan Cancelled
RSM 3.8	Complete Resource Plan	Resource Manager	One all associated tasks and projects that relate to the resource plan are completed or cancelled, and all unused allocations are deleted, move the resource plan to the Complete state.	• Unused Allocations Deleted	• Resource Plan Completed

Resource Workbench

The resource workbench provides resource managers with a comprehensive view of capacity, allocations, utilization and availability for specific resources.

A resource manager can use the resource workbench for:

- Resource confirmation – review resource capacity and existing allocations and then confirm the resources to a request.
- Resource allocation – review availability of all resources and then allocate a named resource to a request.

Capacity Planning (Confirm Resources)

The Confirm Resources view is comprised of two distinct areas –
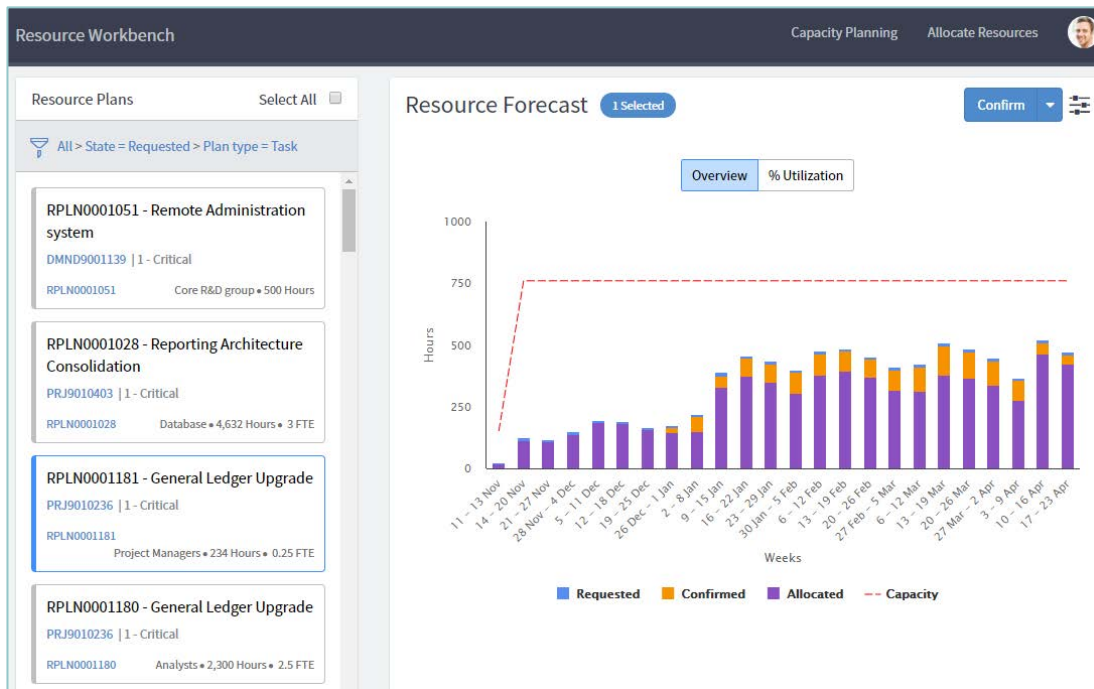
The Resource Plans panel on the left shows all resource plans that meet the set filter conditions (Default conditions are to display only those resource plans that are in the Requested state). You can select one or more resource plans to confirm. Once selected, the forecast is displayed in the Resource Forecast panel.

The Resource Forecast panel on the right, shows the forecast of the selected resource plan(s). The following data sets are displayed in a stacked bar chart:

- Confirmed: Number of hours confirmed. The value considers all resource plans and the hours across all projects and demands for the group or user requested for selected resource plans.

- Allocated: Number of hours that the resource is already committed. The value considers all resource plans and the hours on the user calendar. For example, hours allocated for operational work or meetings across all projects and demands for group or user requested for selected resource plans.
- Requested: Number of hours that the resource has been requested for the selected resource plans only.
- Capacity: Total capacity trend for the resources, which is derived from the user or group schedule. The group capacity is rolled up from the schedules of all the members.

Allocate Resources

The Allocate Resources view is comprised of a single view, filtered based on the displayed criteria (default conditions are to display resource plans ready for hard allocation). This screen is used to drill down into the Resource Plan Details view shown below.
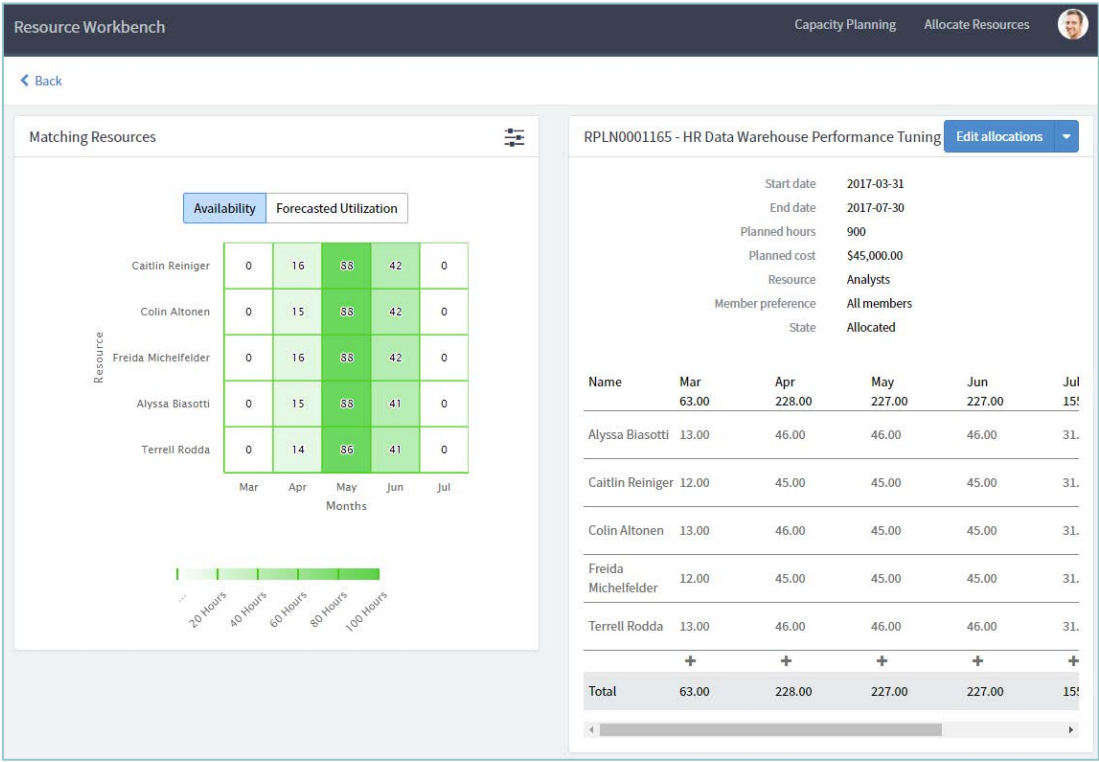
The Resource Plan Details view contains two panels, a heat map with two tabbed views and the suggested allocation panels.

The Available Hours displays a heat map showing the resources that match the resource plan and their available hours for the time period requested in the resource plan.

The Forecasted Utilization heat map displays resource utilization once both soft and hard allocations are taken into account.

The Suggested Allocation Breakdown is displayed in hours. It will match the resource(s) being requested in the resource plan and the requested dates in order make a suggestion on whom to allocate to the request. The resource manager can reject, edit or accept the suggestion.

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Allocation Workbench

The Allocation Workbench is used to allocate resources and evaluate resource capabilities. Allocation Boards can be set up to filter on specific resource plans, for example based on the Portfolio.
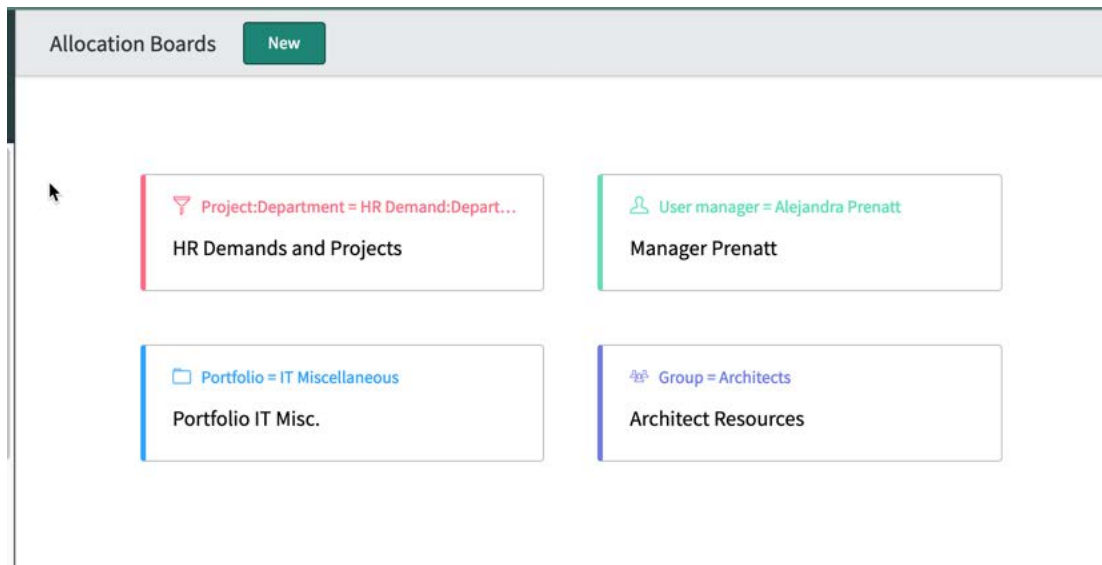
For each Board, individual resources can then be selected based on availability, assigned to resource plans and the plans can then be confirmed / allocated.

See also:

https://docs.servicenow.com/bundle/orlando-it-business-management/page/product/resource-management/concept/allocation-workbench.html

Resource Reports

Resource management reports provide resource requesters and resource managers with resource allocation, availability, and utilization data.

For more information on the types of reports available in the Orlando Release, please click here to access the ServiceNow Platform documentation site.

Appendix A: Document Conventions

Symbol	Description
	Process start or end point represents the starting and ending point of the process.
	Process activity or task presents an activity or task that needs to be accomplished to produce a specific outcome.
	Predefined external process or organization indicates a contribution from an external process or organization.
	Decision: indicates that a question needs to be answered in order to identify the following activity or task in the process. The answers are indicated on the different connectors attached to the decision box. Every answer is linked to an associated activity or task.
	System action or function indicates that an action is being performed in the system as an output of the previous activity and an input to the next.
	Off-page reference indicates a reference to another diagram within the same process. The number of the referenced diagram is indicated in the shape.
	On-page reference indicates a link to another activity within the same diagram.
- - - - - - →	Association: indicates an association or a relation between the connected, processes, tasks, or activities. May be represented by a dotted or dashed line.
──────→	Sequence flow: shows the order in which the activities are performed. Represented by a solid line and arrowhead.

Appendix B: Innovation Management Illustrations

Creating an Idea

1. Via the Service Portal – From the Homepage, click on *"Get Help"* then Select *"Submit Idea"*-
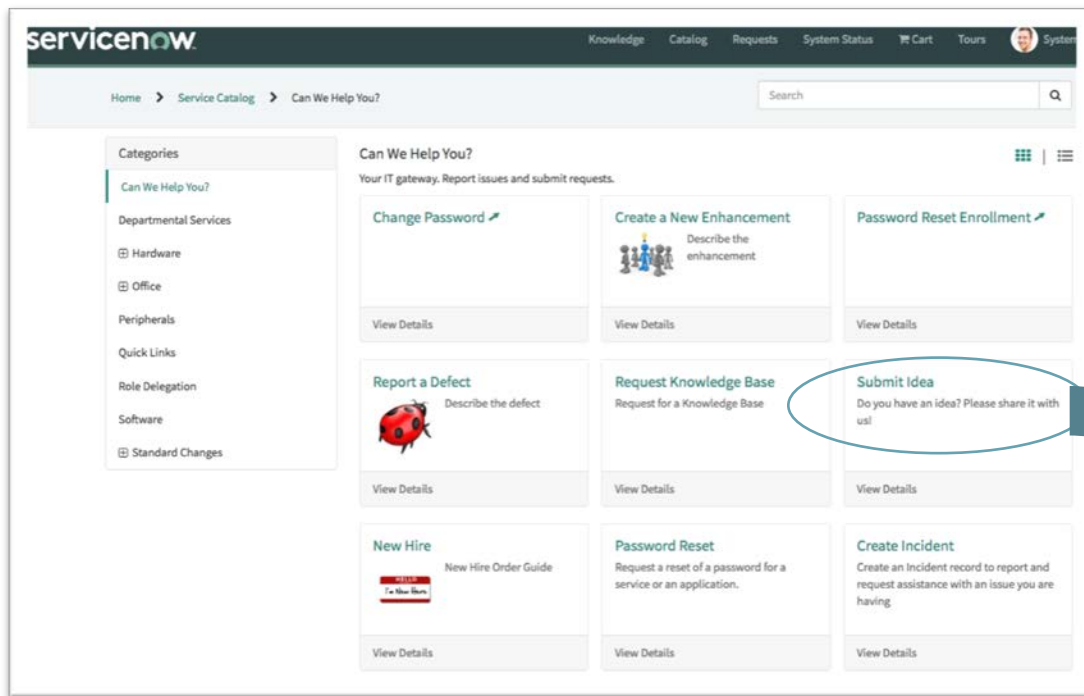
![servicenow logo]

Using the Idea Portal

1. Via the Application Navigator type Idea, click on *"Idea Portal"* then select *"Create an Idea"*.

Appendix C: Demand Management Illustrations

Creating a Demand

1. Service Catalogue - Click on *"Can We Help You?"* and Select *"Create a New Demand"*

Demand Record

Demand Record Financials

Demand Record Assessment Data

Appendix D: Project Management Features

- Project logic: All basic project management concepts (such as planned start and end dates, durations, dependencies, time calculations, and resources). All planned tasks (project, project task, and any planned-type tasks you want to create) automatically inherit this functionality. As a result, all the planned tasks can work together within a project and share identical methods for calculating their dates and durations.

- Parent/child relationships: The parent/child structure for building the project hierarchy (phases and tasks) utilizes the Parent field on the Task table.

- Dependencies: Project management has many-to-many dependency capabilities, which allow for a task to be both predecessor and successor to multiple other tasks.

- Modular templates: The template functionality in the base system allows any existing project in the system to be used as a template. Copy a smaller sub-project from a larger project structure and make it an individual project. This encourages a more modular approach to building projects, since a project usually consists of many smaller templates: one for the generic project structure; one to create the project approval tasks; and one to create the project closure tasks.

- Project management platform integration: The Create Project option enables a user to create a project directly from an incident, problem, or change record. The new project is pre-populated with data from the source task.

- Baselines: A project manager can create a project baseline at any time. This baseline is a real-time data copy of the current project's structure that can be used for comparison reporting later.

- Milestones: Milestones (or gates) are fully supported and are defined as planned tasks with zero duration. Milestones are treated like any other planned task, except that they are, by default, represented by a diamond (fully customizable) on the Gantt chart.

- Risks and Issues: Project risks and issues can be tracked against a project. Since issues are Task table extensions, they can be managed like any other task: assigned, measured with SLAs, or included in notifications.

- Resource allocation: The User Resources related list associate's users with project tasks and assigns them a percentage allocation. This percentage allocation is checked against the project schedule and used to calculate the number of hours the percentage allocation represents. These hours are then used to determine the resource's availability.

- Assignment restrictions: Assignment of tasks within a project can be restricted to users listed in the project's User Resources list.

- RIDAC: Management of risks, issues, decisions, actions and request changes within projects.

Appendix E: Project Task Dependency Types Currently Supported

ServiceNow project portfolio management supports ASAP and Start on Specific Date time constraints. ServiceNow sets the time constraint for tasks imported from Microsoft Project to Start on Specific Date if their Microsoft Project time constraint is different than ASAP.

For example, if Task 1 is a predecessor of Task 2, then Task 2 cannot start until Task 1 finishes. Microsoft Project tasks with other types of dependencies, such as finish-to-finish dependencies, are imported as standalone tasks without any dependencies.

Dependency Type	Description	Currently Supported
Finish to Start	Task 1 is predecessor of Task 2 with a Finish to Start dependency type. Task 2 cannot start until Task 1 finishes	Yes
Finish to Finish	Task 1 is predecessor of Task 2 with a Finish to Finish dependency type. Task 2 cannot finish until Task 1 finishes.	No
Start to Start	Task 1 is predecessor of Task 2 with a Start to Start dependency type. Task 2 cannot start until Task 1 starts.	No
Start to Finish	Task 1 is predecessor of Task 2 with a Start to Finish dependency type. Task 2 cannot finish until Task 1 starts.	No

Appendix F: Investment Portal Timeline View

The Investment Portal views are used to assess the progress of the projects within a portfolio. The Timeline View shows a summary of portfolio projects and milestones. The start and finish date for each project is displayed in relationship to other projects.

Also, the Investment Portal feature allows project, program, and portfolio managers to find their projects based on any filter criteria such as manager, location, priority, risk, program, portfolio etc. and then track schedule of these projects together to keep a close watch on these projects.

For example, as a portfolio manager for IT projects for marketing department, I want to closely track schedule of all the high-risk projects which are going live in next three weeks.
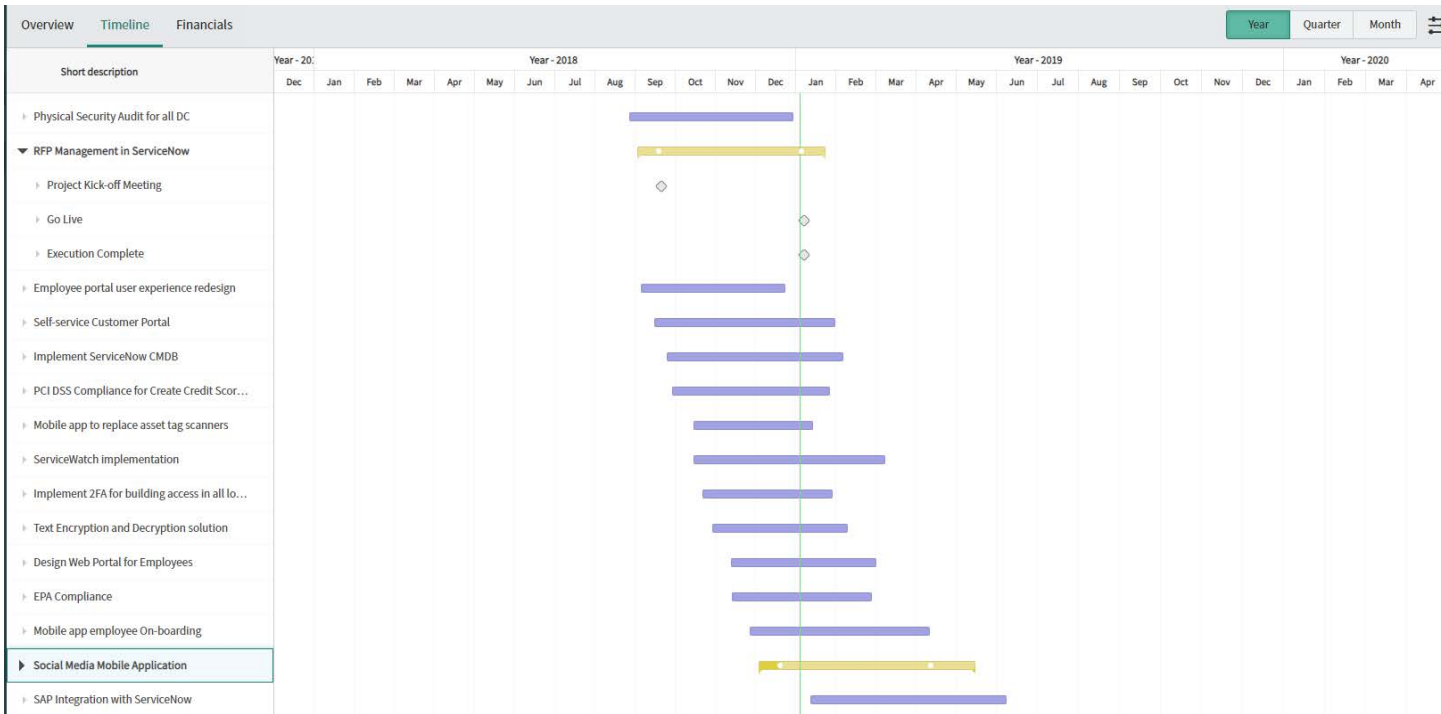
Figure 23: Investment Portal Timeline View

Appendix I: Resource Management Form Fields

Resource Plan form fields

*Indicates fields that are Mandatory

#	Resource Section/Tab	Field Name	Purpose	Stage When Field is Populated	Field Type
1	Header	Name	Descriptive name for the plan. If you do not enter a name, the name becomes the Number + Short description. If the short description for the task is empty, the plan number is used.	Planning	String (130)
2	Header	Start date*	Start date for the resource plan. By default, this field shows the Planned start date of the associated project record or task record. Edit the default date, if necessary.	Planning	Date/Time
3	Header	End date*	End date for the resource plan. By default, the date is derived from the Planned end date of the associated project record or task record. Edit the default date, if necessary.	Planning	Date/Time
4	Header	Number	Unique, auto-generated identification number for the demand	Planning	String (40) - Auto
5	Header	Task*	Task to which the plan applies. If the resource plan was created from a project task, the task number appears here.	Planning	Reference
6	Header	State	The current state in which the resource plan is in its overall flow.	Planning	Integer - Choice
7	Resource Details	Resource type	Category of resource. To select a group, select Group Resource. To select an individual user, select User Resource.	Planning	String (40) - Choice
8	Resource Details	Group resource*	Only shown when Resource type is Group resource. Identifies either the group from which individuals are being requested, or the group being requested.	Planning	Reference
9	Resource Details	Members preference	Only shown when Resource type is Group resource. Allows the resource requested to input their requirement for the group	Planning	String (40) - Choice

#	Resource Section/ Tab	Field Name	Purpose	Stage When Field is Populated	Field Type
			selected. Choices include All members, Specific members or Any members.		
10	Resource Details	Role	Only shown when Resource type is Group resource and Members preference is Any member or All members. Allows the requester to identify the role of the resource they require from the group selected previous.	Planning	Reference
11	Resource Details	Skills	Only shown when Resource type is Group resource and Members preference is Any member or All members. Allows the requester to identify the skills of the resource they require from the group selected previous.	Planning	List
12	Request Details	Request type	The requester can set the unit used in the Planned hours field. Choices include Hours, FTE and Person days.	Planning	String (40) - Choice
13	Request Details	Planned hours/FTE/Person days*	The number of hours, FTE or Person days that are being requested.	Planning	Decimal
14	Request Details	Allocated hours	Allocated hours rolled up from hard resource allocations.	Allocated	Decimal
15	Request Details	Actual hours	Actual hours rolled up from timecard entries.	Allocated, Complete	Decimal
16	Request Details	Planned cost	Amount in Planned hours multiplied by the hourly rate of the specified user or group resource. This amount is a first-draft estimate of the resource plan cost.	Planning	Currency
17	Request Details	Allocated cost	Number of allocated hours multiplied by the labor rate card of the allocated user resources. Used to give a more accurate estimation of the cost of the plan that is allocated.	Allocated	Currency
18	Request Details	Actual cost	Based on the same timecards used for the Actual hours, the actual cost is calculated using the labor rate of each user and the hours the user worked. Used to inform resource requesters and	Allocated, Complete	Currency

#	Resource Section/ Tab	Field Name	Purpose	Stage When Field is Populated	Field Type
			resource managers of actual costs based on the actual hours that user resources added on their approved timecards.		
19	Allocation Config	Allocation type	Type of resource distribution across the project that determines the type of allocation records. The value in this field determines how the planned hours are distributed across resource plan duration among requested resources. Choices include Weekly, Monthly and Plan Duration.	Planning	String (40) - Choice
20	Allocation Config	Allocation spread	Type of hard allocation. The value in this field determines the manner in which the allocated hours are spread while creating hard allocations. Choices include Even and Front load.	Planning	String (40) - Choice
21	Notes	Notes	Additional correspondence and notes about the resource plan.	Any stage	Journal

Requested Allocations fields

*Indicates fields that are Mandatory

#	Resource Section/ Tab	Field Name	Purpose	Stage When Field is Populated	Field Type
1	List	Start date*	Start date for the requested allocation record.	Requested	Date
2	List	End date*	End date for the requested allocation record.	Requested	Date
3	List	Person days	Number of person days for the requested allocation record.	Requested	Decimal
4	List	FTE	Number of units for the full-time equivalent selection for the requested allocation record.	Requested	Decimal
5	List	Resource plan*	A link to the Resource plan from which the requested allocations were generated.	Requested	Reference
6	List	Requested hours	The number of hours to allocate to the requested allocation record. By default, the planned hours on the resource plan form are proportionally distributed among all the requested allocations.	Requested	Decimal
7	List	Requested cost	This is the estimated cost of the resource; it is calculated using the Requested hours field and the applicable hourly rate.	Requested	Currency

Resource Allocations fields

*Indicates fields that are Mandatory

#	Resource Section/ Tab	Field Name	Purpose	Stage When Field is Populated	Field Type
1	List	Number	Unique, auto-generated identification number for the demand.	Confirmed	String (40) - Auto
2	List	Resource*	The named resource being assigned to the resource allocation.	Confirmed; Allocated	Reference
3	List	Resource plan*	A link to the Resource plan from which the resource allocations were generated.	Confirmed	Reference
4	List	Start date*	The start date for the assigned resource. The start and end dates must fall within the dates of the resource plan.	Confirmed	Date
5	List	End date*	The end date for the assigned resource.	Confirmed	Date
6	List	Person Days	The resource allocation expressed in terms of person days.	Confirmed	Decimal
7	List	FTE	The resource allocation expressed in terms of FTE.	Confirmed	Decimal
8	List	Requested hours*	The number of hours being requested for allocation.	Confirmed	Decimal
9	List	Allocated hours	The number of hours being allocated for the resource.	Allocated	Decimal
10	List	Booking type	Displays whether the resource allocation is a soft booking or a hard booking.	Confirmed; Allocated	Integer - Choice

Appendix J: Resource Management Walkthrough

Creating and Submit a Resource Plan

1. Select a New from either a Demand, Project, Enhancement from the Resource Plan Related list within the record –
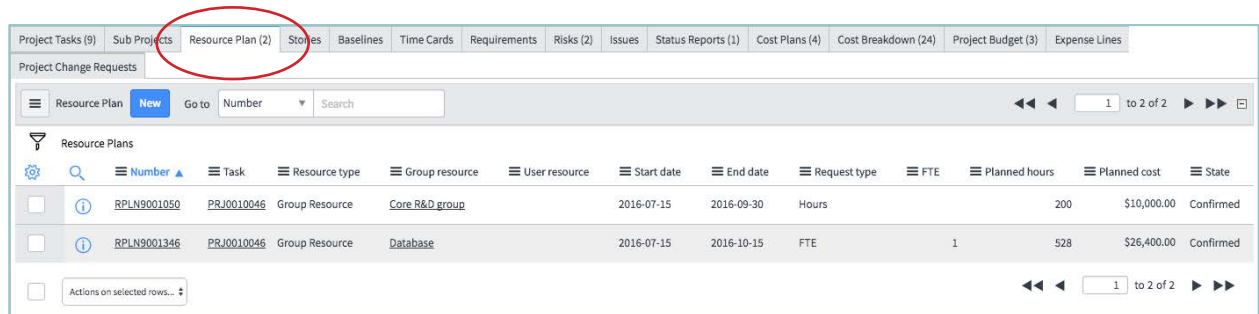
Or using the Create New module under the Resource application in the navigator -
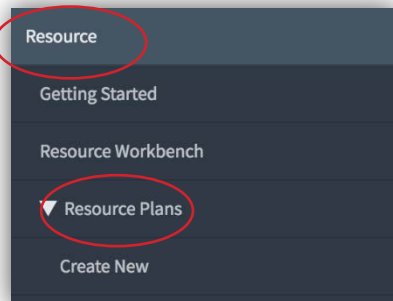
2. Select if the resource request is for a group or user (specific individual) -

3. If the resource request is for a group –

4. If the resource request is for a user -

5. Fill in the remainder of the resource plan based on the resourcing requirements and click Submit or Save if the resource plan is not finalized, or Request to move the plan into the Fulfil Resource Request process (requested state) -

Fulfil Resource Request

1. The resource manager can confirm if there are resources available for the request directly within the workbench from the capacity planning view. In this example, the selected request is going to result in a 125% utilization of the requested resource -
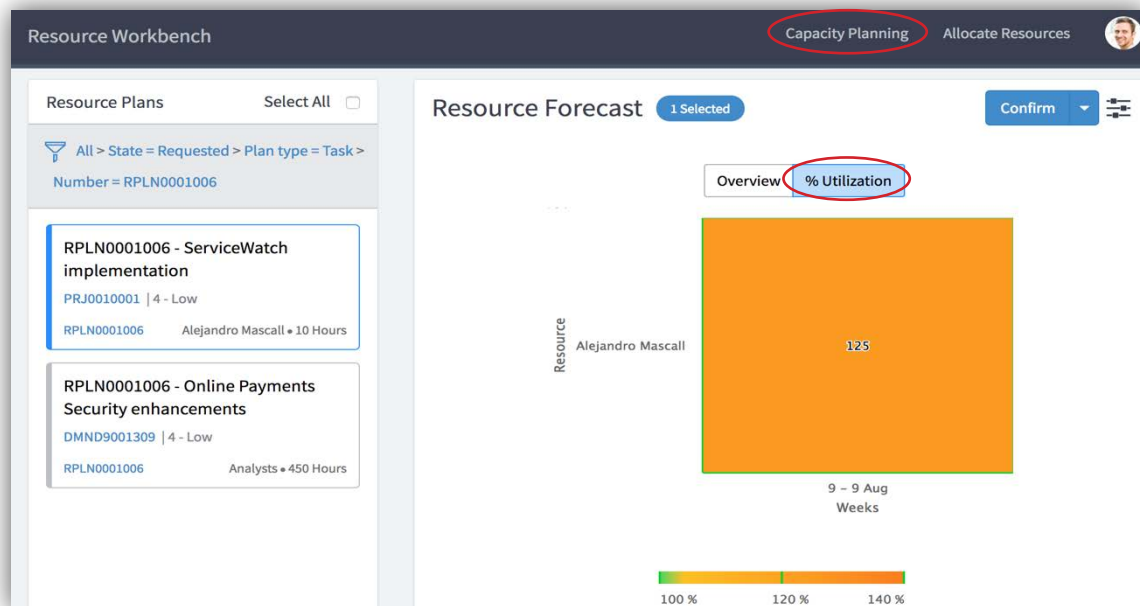
The resource manager can also view resource availability from the Allocate Resources view -

2. If there are not enough resources to meet the request, the resource manager can reject the request directly from the workbench by selecting the arrow next to Confirm, then Reject –
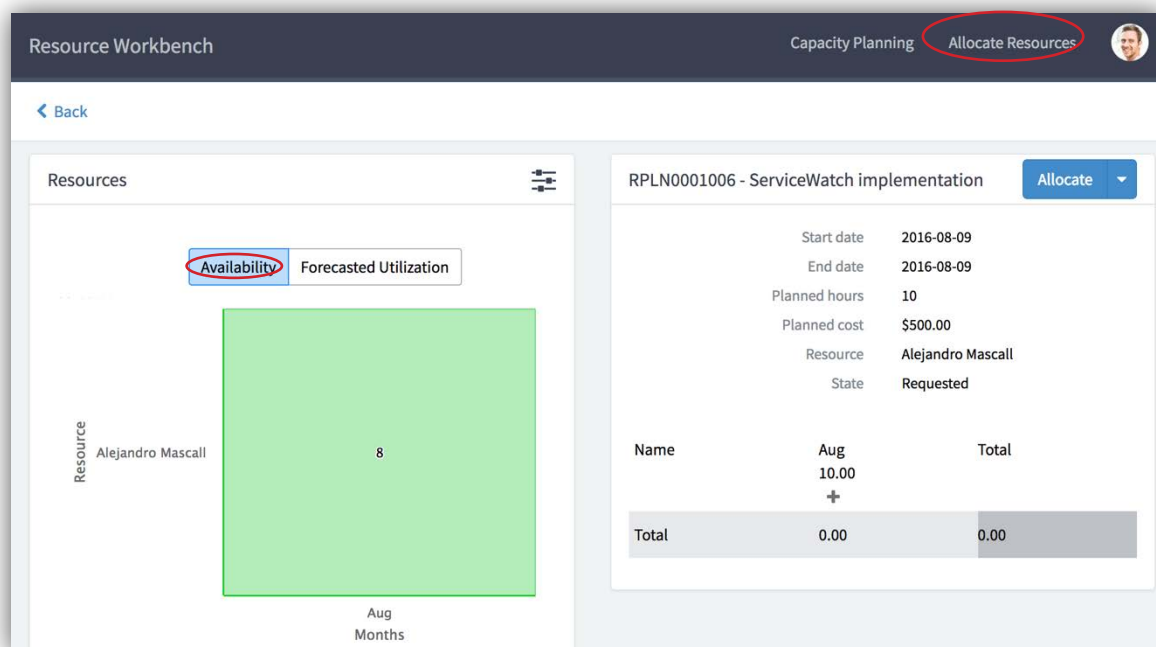
3. If there are enough resources, the Resource Manager can either Confirm (creates soft bookings) or Confirm and Allocate (creates hard bookings) the resource request –

4. If the resource plan was initially Confirmed, the resource manager can come back to the workbench and Allocate at any time -

Maintain Resource Plan

1. If a resource plan needs to be extended, the resource requester can change the End date using the Extend Resource Plan button and have the updated allocations re-calculated –

2. A resource manager can edit or cancel a resource plan –

3. To complete a resource plan, a resource manager can navigate to the resource plan and mark it as complete –