YASH
Technologies ®

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User Manual

Resource Management

Powered By – Service Now

Created By – XACT Product Team

Document Control

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Company Name	YASH Technologies
Division Name	YASH Next
Document Name	Resource Management User Guide
Version Date	11/05/2022
Version Number	1
Effective Date	11/05/2022
Next Review Date	

Change Record

Modified Date	Author	Version	Description of change

Contents

XACT Resource Management ~ User Manual

Purpose:

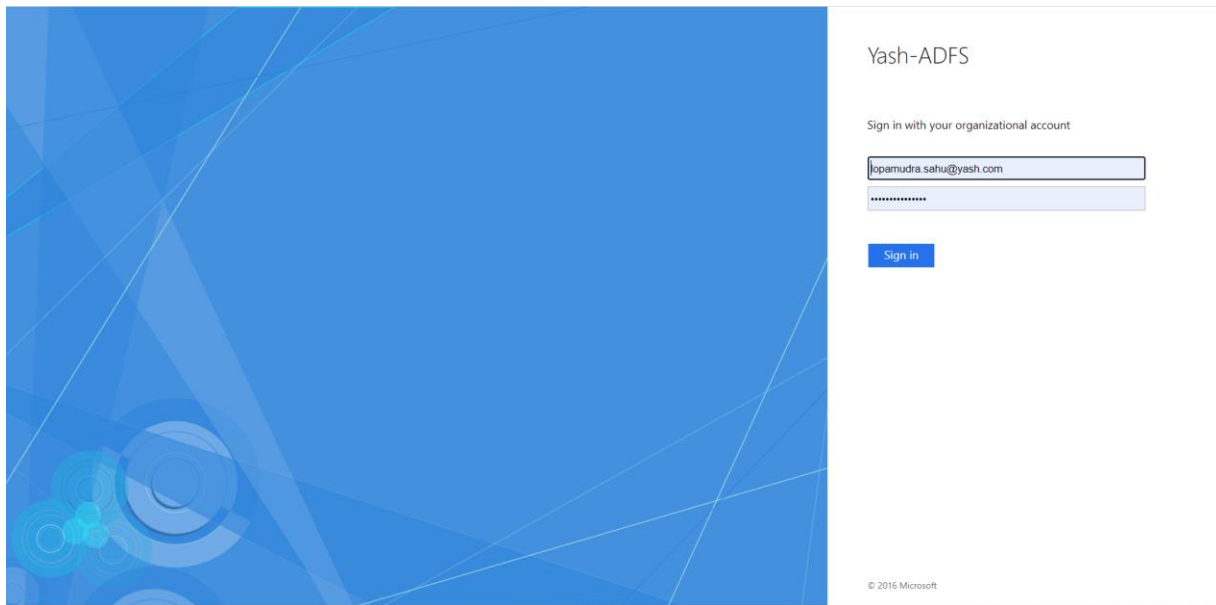To provide a high-level overview of the resource management module for users.

Scope:

This document contains the steps to create a resource plan, view allocations, plan resources on service now.

Roles:

Project Manager, Delivery Manager, Competency Manager

Walkthrough on Service Now:

Production : https://yashinmsp.service-now.com/
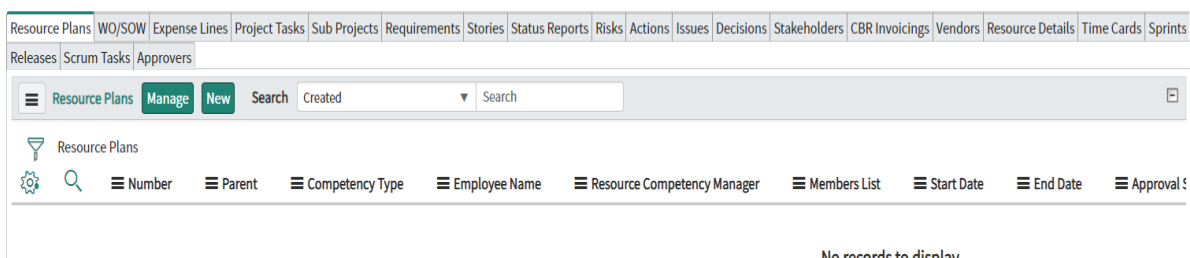

Home page of ServiceNow .
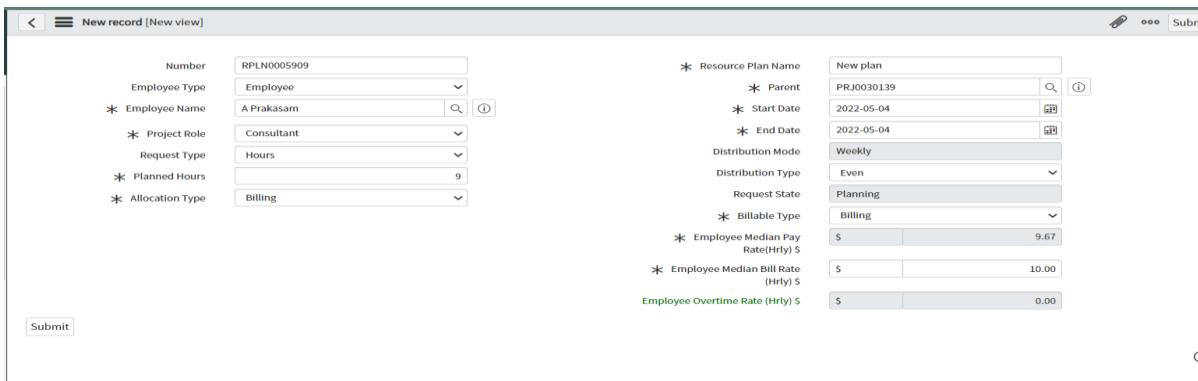
How to Create a Resource Plan

Create a resource plan from the Resource Management application for any task such as Demand, project, project task, incident, problem, or change. Edit and adjust the plan until ready to submit for approval.

As a project Manager for creating a resource plan, create a new Project or verify with any existing or created project
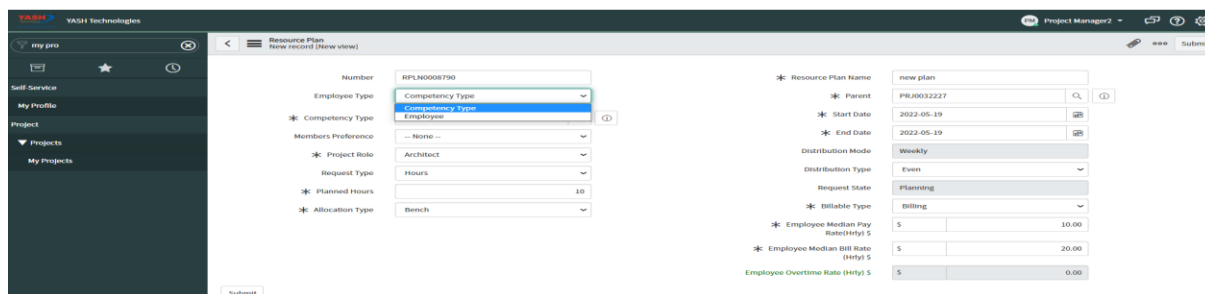
1. Click on **Resource Plan Tab** on the bottom of the screen and Click on new button.

2. Fill in the details for the Resource Plan

3. Fill in the Resource Type as required i.e. Competency Type or Employee

4. For Competency Type Click on the *Navigator* and select from the list as required.

5. Select Members Preference from the drop-down list:
   • **All Members:** To request all members of a group or role, select All members. The requested time gets split among all members of the selected group or role proportionally depending on their capacity. Before making the hard allocation, if all members are not required, the resource manager can select only the desired members of the group or role.
   • **Specific Members:** To request specific members of a group or role, select Specific members, and then select members from the Members list. The requested time gets split among the selected members of the selected group or role proportionally depending on their capacity.
   • **Any Member:** To select any member of a group or role, select Any member. Resources that are most available during the plan duration are requested first. Soft allocation is created only for these resources on confirmation.

6. Select Resource Role which is mandatory selection from the drop down

7. After selecting resource role, Resource Type will populate.
   Note: To specify a request in hours, select Hours. To specify a request in full-time equivalents, select FTE and Man Days and fill the details.

8. Fill in Details like Name, start date and End Date, Allocation Spread (Front Load, Even)
   - **EVEN:** Create resource events for the resource by splitting the hours evenly across all working days for the allocation duration.
   - **Front Load:** Create resource events for the resource by filling up all available slots of the resource from the start date of the allocation.

9. Select Billable Type - Billing, Non – Billing, Overhead, OverTime.

10. Fill in all mandatory and required fields and Click on Submit Button.

11. After Submitting the resource plan form system will display the Request Approval Button to take approval from Delivery manager and the Approval status will display.
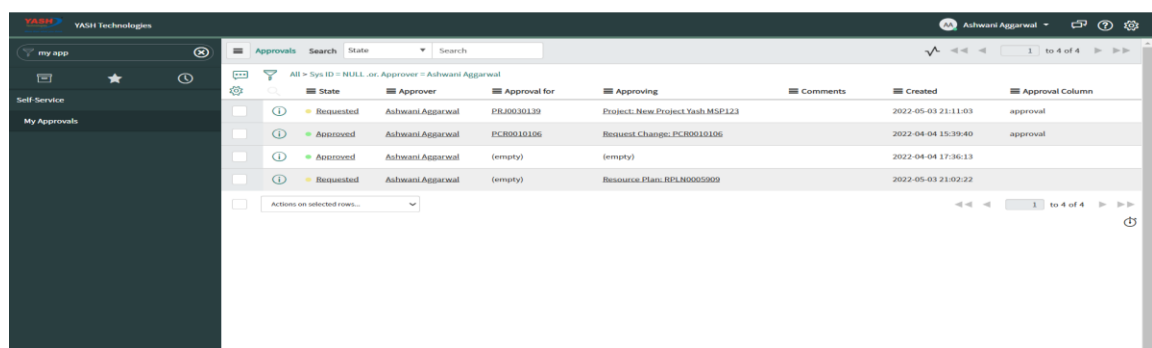
12. If Resource plan will create under Project and sent for approval from Delivery manager then the Email/notification will trigger as below

13. After creation of Resource plan as a project manager it will go to Delivery manager Approval.

Approval from Delivery manager

14. Delivery manager can open Instance . Navigate My Approvals/My pending approvals.

15. Verify the Created Project and Resource plan and Approve it.

16. Email will trigger after approving the created resource plan and project

17. Login as Project manager again and check for created Resource plan for resource Allocation from competency manager.
18. Open the created Resource plan Record verify and click on Resource allocation Button.

19. By clicking on Request Resource Allocation button resource plan request will deliver to Competency Manager.

20. Request Change Button is there to Change/Edit the Resource plan form if needed.

21. Click on Update and verify the list view of Resource plan. Check the Resource competency manager and Login as competency manager.
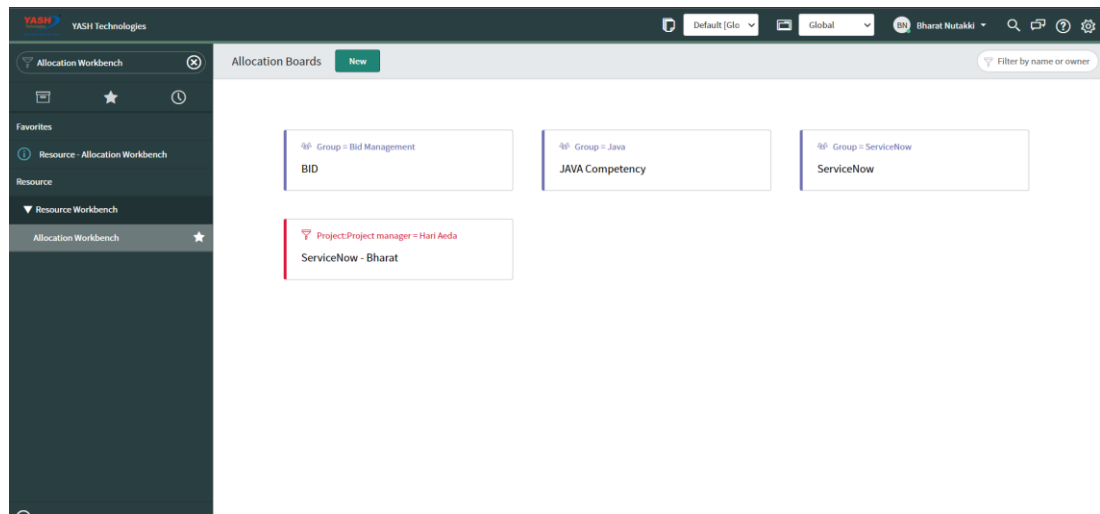

22. Email will trigger for Request resource allocation from Competency manager.
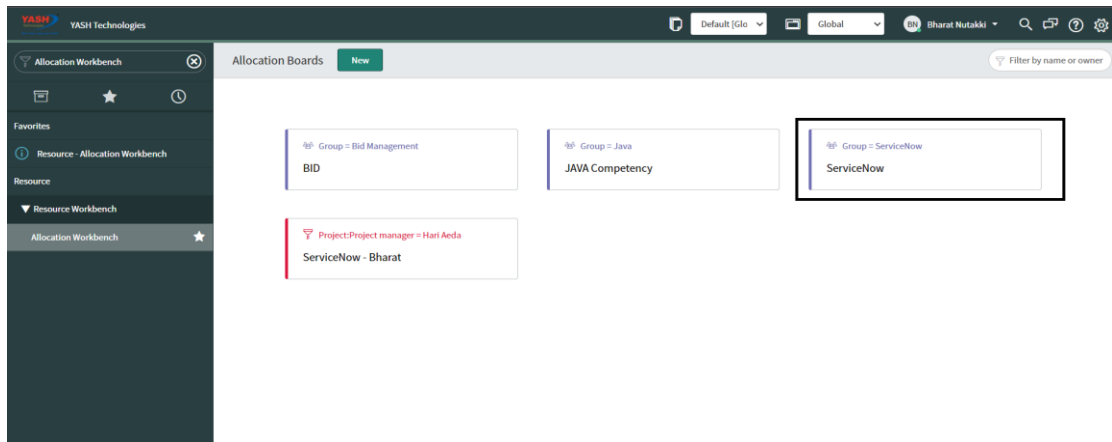
Resource Allocation by Competency manager

23. Open instance as competency manager and navigate to Allocation work bench.

24. Click on Created Allocation Work board or create a new allocation work board.

25. For Creating a new Allocation work board Click on new button and fill all the mandatory fields as below mentioned.

26. If Allocation board is already existing then click on the particular Allocation board. User will be able to see the Allocation work bench screen.

27. Select the requested Project name and click on Competency name.

28. User will be able to see the all resource name with their availability details.

   For resource selection user can click on **Resource finder** UI Action Top-right from the page.

29. Select any resource as per his/her availability time for project and Confirm.

30. After clicking on confirm button resource will be confirmed as Soft lock.
31. Email will trigger after confirming the resource and resource will assign with Soft lock

32. For allocating resource click right side toggle button and click on Change state>Allocate. Resource will be allocated for the particular project successfully and he/she will be assigned as Hard Lock.

33. After Allocating the Resource under project resource will be locked as Hard lock and email will trigger for resource allocation.

Resource Request Hard Locked: RPLN0008792

DW   **Digital Workflows** <yashinmsptest@service-now.com>

To: Integrationptg Notification   Wed 5/18/2022 8:34 PM

Hi Project Manager1,

Your resource request has been allocated (Hard Locked). Click on the link below to view the details.

Resource plan ID: **RPLN0008792**

Project Name: **New MSP Details 123-UAT**

Link: Click here

Regards,

PMO

Unsubscribe | Notification Preferences

Ref:MSG0175621_uT26wYhvYkwWkArHXL7N

| What is this? | What does this mean? | Received, and accepted. |

Are the suggestions above helpful?   Yes   No

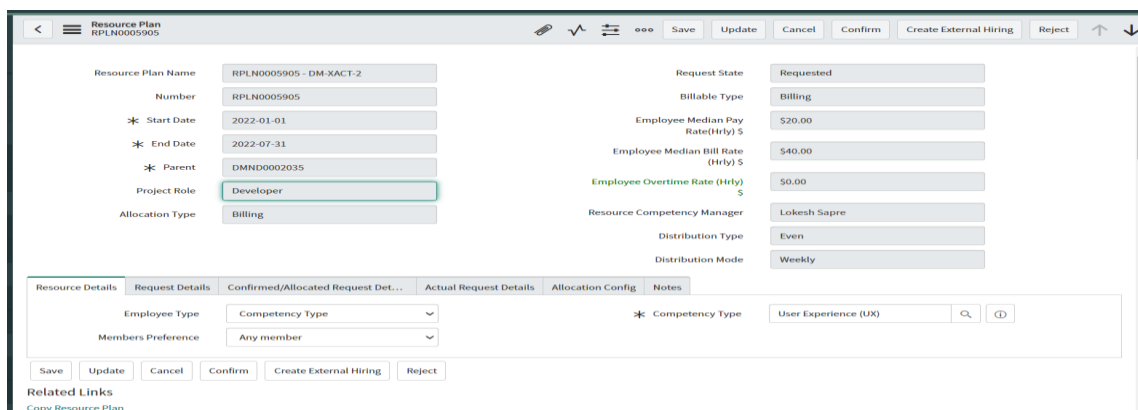← Reply   → Forward

34. If enough Resources are not available in Organization pool or need to add more resource in Particular project then Competency manager can do External Hiring for new resources from out of Organization.
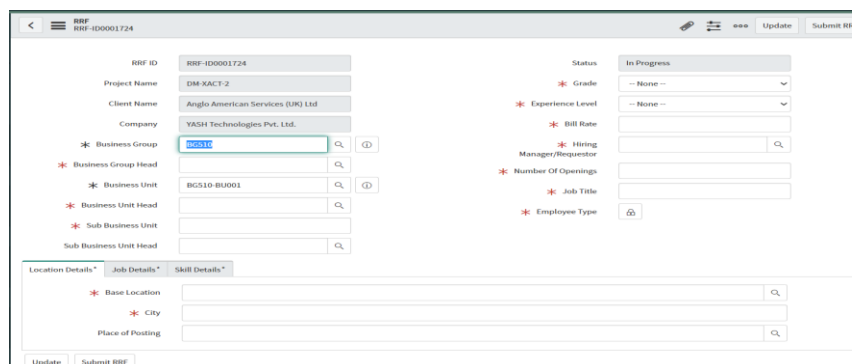
External Hiring Process

Resource Manager has the option of creating external hiring requests from within Service Now against a resource request (from demand or project). This information from SNOW flows to SAP Success Factors Recruiting (RCM) - (Infogram) and the Competency Manager will then have to enter other required fields/manage tracking on RCM module– Infogram.

1. A Project Manager creates a resource plan wherein all the below information is filled w.r.t resource roles, allocation types, pay rates, overtime rate and the allocation spreads. Competency manager creates an external hiring request against this resource plan, if there is no available resource in YASH Competency pool:

2. Click on *Create External Hiring* and the page will be navigated to the **RRF** form which he has to be fill against the details

3. Capture the Grade requirements

4. Capture the experience level

5. Select job category and other details

6. Capture skill requirements from the skill master data available on SNOW
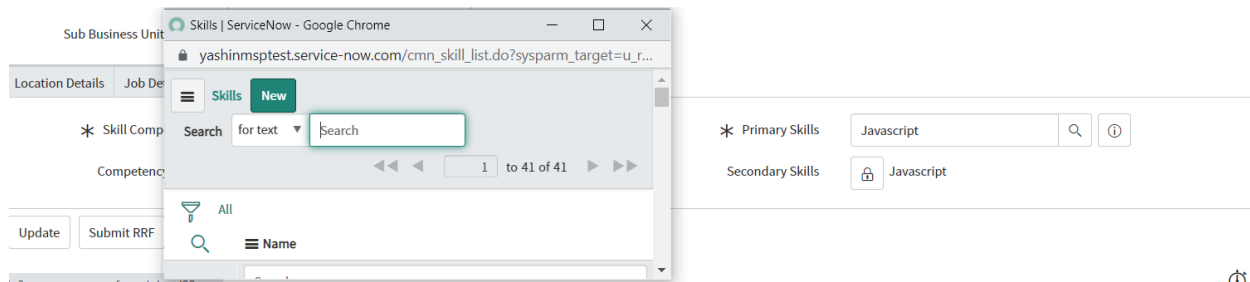
7. Select Secondary Skills
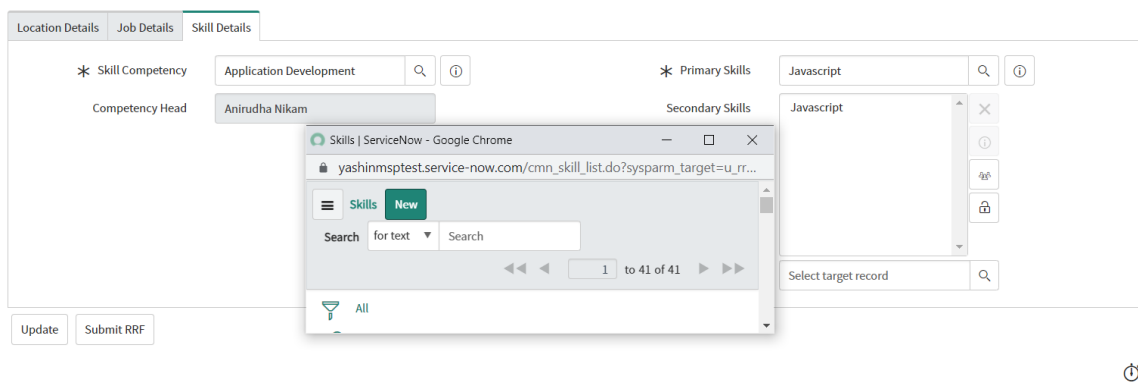
8. Hiring is usually captured for a project, but other options from the list can be selected
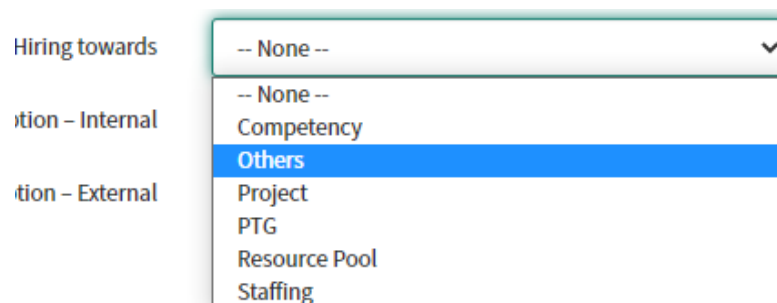
9. Click on *Submit RRF* and the details will flow to the RCM on Infogram.

10. Competency manager can navigate with External Hiring module in SNOW plat form and can verify with created RRF ID.

Competency Manager on RCM Module

Prod users can check the SAP Success Factors of Yash Technology pvt. Ltd.

1. Users can log into the SAP SuccessFactors under Yash Technology pvt. Ltd.

   Navigate to the Recruiting section of Infogram
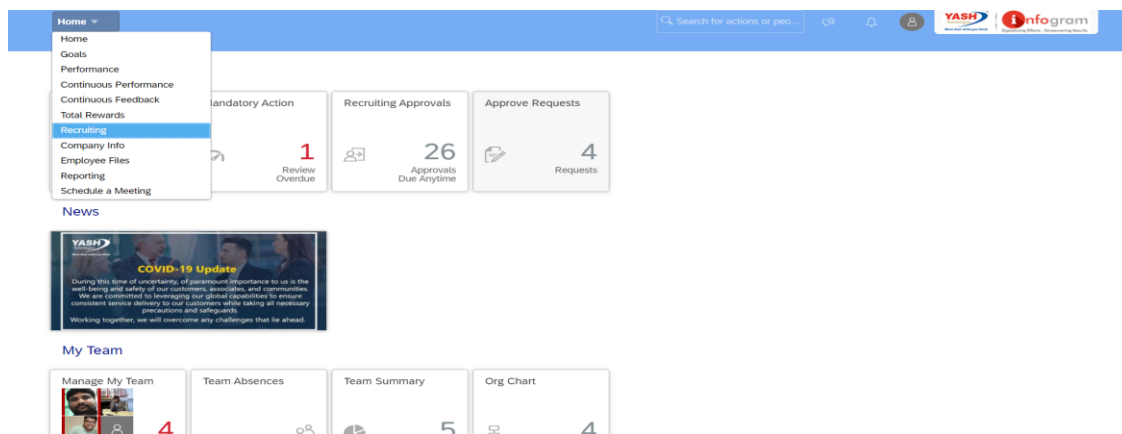
2. Page will be redirected to RRF details created in SNOW on the RCM module

3. RRF's on RCM will be visible to enter further corresponding details

4. Hiring manager also have permission to cancel the Job Requisitions

How to View Capacity Planning: Competency Manager

1. Click on the home page and using the filter navigator, search for Capacity Planning
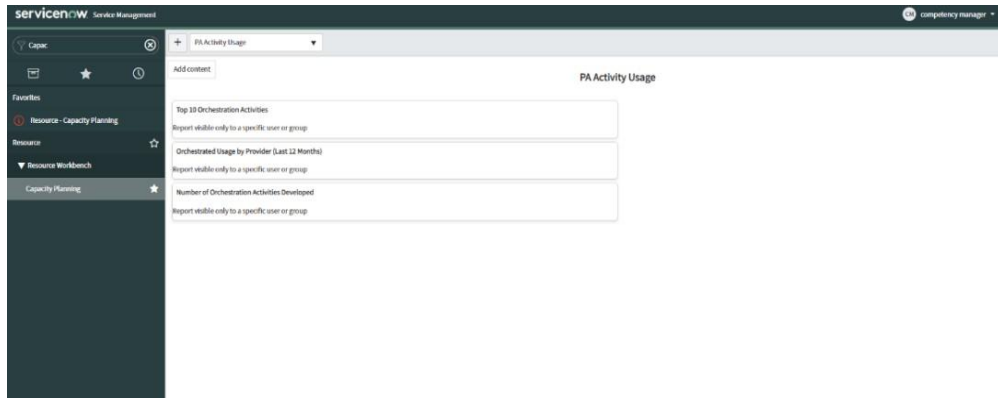
2. Click on *Capacity Planning* and the landing page will load where Resource Forecast will be visible. Click on *Confirm* based on availability.
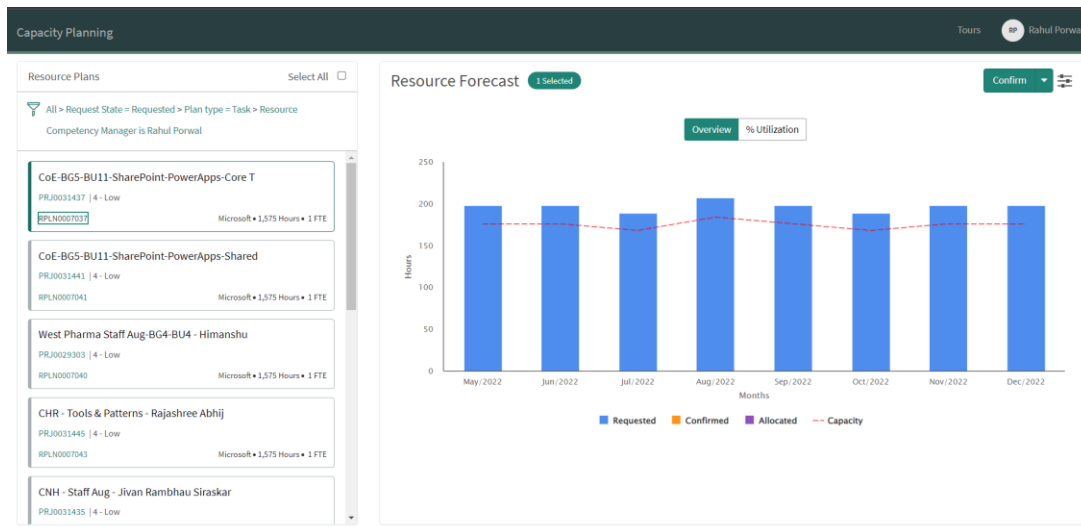
3. Click **Okay** on the pop up screen, based on availability.
   Once approved, the state will change to confirmed
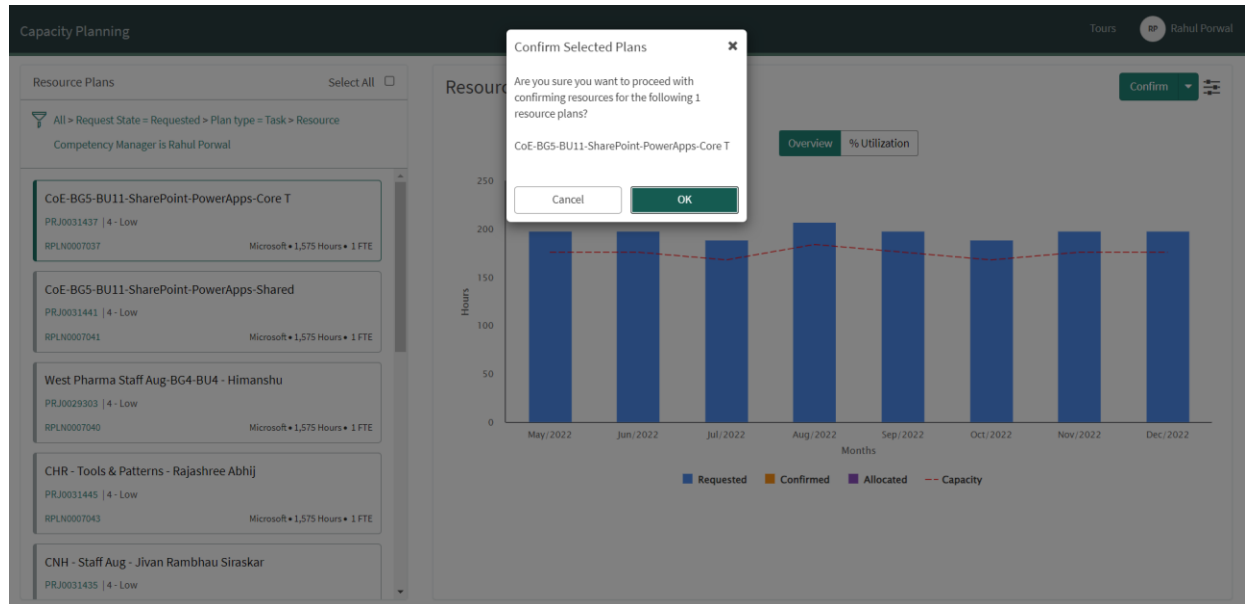
4. Resource plan can confirm by click on OK button.
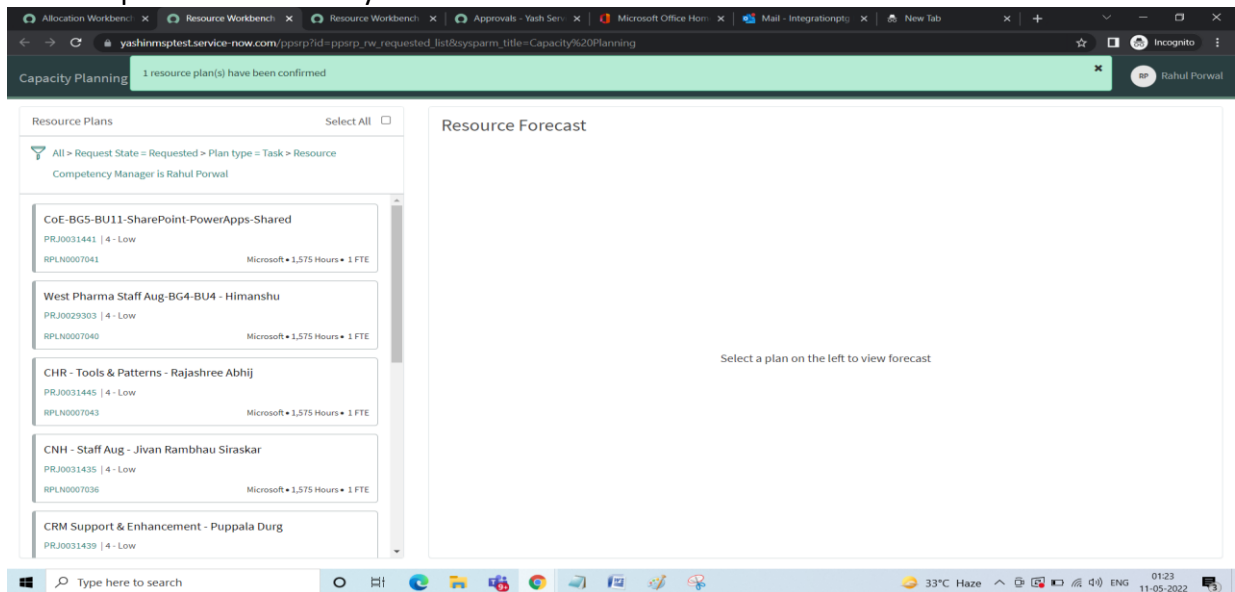
END

Questions and Answers

Q.1. For New resource plan creation which process need to follow?
Ans:- Project manager can navigate Projects>Create a new project/ Take an existing project > Save with appropriate datas> Go to related Tabs under Project>click on Resource plan tab> Click on New Button> User can see new form for Resource plan> he/she can create the Resource plan > Submit the form> Click on Request Approval button.

Q.2. What is the approval process for Resource plan form?
Ans:- Project manager can create new resource plan and click on Request approval button take approval from Delevery manager > Again project manager can open his/her resource plan record and click on Request resource allocation button to allocating resource from Competency manager > Competency manager can allocate resource and it will be as Hardlock.

Q.3. Why employee type drop down has two different options to select Employe type and Competency type.
Ans:- Competency type option is to select any particular competency name under competency name project manager can request for resource.
For selecting Employee type to request any particular resource with his/her details for the project

Q.4. Is it correct to proceed with ZERO value for Planned Hours?
No,Planned hours always greater than ZERO value,but a limited time period

Q.5. Why the investment option is there in Allocation Type Dropdown field.
Ans:- Investment means cotract base employee selection.

Q.6. What is the Parent ID number?
Ans:- Parent ID is nothing but the Project ID under which the resource plan is creating.

Q.7. Why distribution Type dropdown option is there and what is the use of Front load and Even?
Ans:- Need to check

Q.8. What is Employee Median Pay Rate(Hrly) $?
Ans:- This is payroll of employee in organization.

Q.9. What is the Employee Median Bill Rate (Hrly) $
Ans:-

Q.10. Why request Approval button is there in Resource plan form?
Ans:- To take approval from Delivery manager.

Q.11. How Resource Planned Cost is calculating?
Ans:- Planned hours multiply with Resource median Pay rate

Q.12. How delivery manager will approve resource?
Ans:- Navigate My approval/my pending approvals > Verify and open requested record for resource > Approve

Q.13. How competency manager will approve the Resource record
Ans:- Navigate allocation workbench > Open with allocation work board > Verify the project name and resource competency > search with resource finder and select confirm > From right toggle button Click on change state> Allocate.

Q.14. How to request External Hiring as competency manager?
Ans:- Navigate resource requested > Open with Required Project name > Clicck on External Hiring button > Open with RRF form fill mandatory fields and Submit.

Q.15. Is it possible that project manager or delivery manager can allocate resource for project?
Ans:- No only competency manager can allocate the resource .

Q.16. What will be the possible scenario if Project manager wants 10 resource for one project and only 6 resources are available in Organization pool.
Ans:- In this case Competency manager can do External hiring for resource for this project.

Q.17. How project manager will get to inform about approval process?
Ans:- Through Email/notifications

Q.18. What will be the process if Delivery manager will not available to approve the resource request for the particular time period.
Ans:- Escalation/Reminder emails will trigger to user's manager