

# User Manual Resource Management

Powered By – Service Now

Created By – XACT Product Team

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## Document Control

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## XACT Resource Management ~ User Manual

### **Purpose:**

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

### **Scope:**

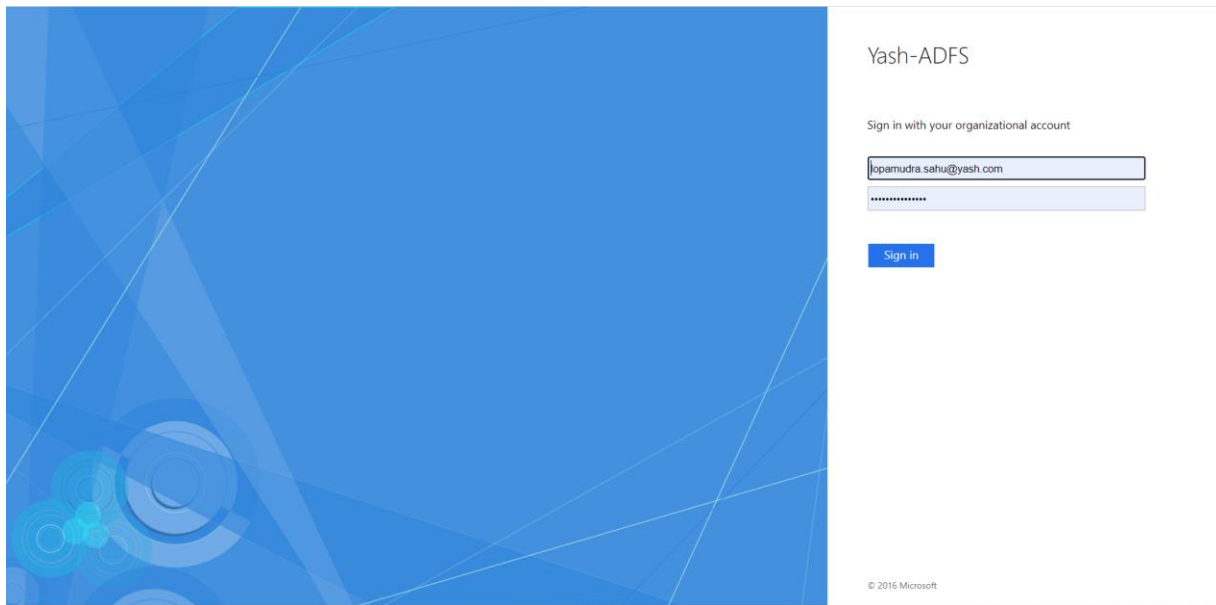
This document contains the steps to create a resource plan, view allocations, plan resources on service now.

### **Roles:**

Project Manager, Delivery Manager, Competency Manager

## Walkthrough on Service Now:

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



Home page of ServiceNow .

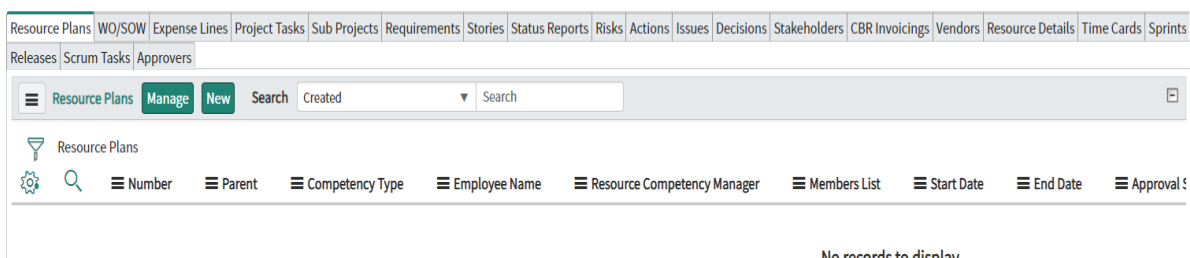
| Number      | Catalog | Item                                   | Approval  | Quantity | Stage        |
|-------------|---------|--|-----------|----------|--------------|
| BITM0067714 | (empty) | Add New Skill                          | Requested | 1        | Progress bar |
| BITM0067580 | (empty) | Add New Skill                          | Requested | 1        | Progress bar |
| BITM0051881 | (empty) | Request Internet access Youtube/ Gmail | Requested | 1        | Progress bar |

## How to Create a Resource Plan

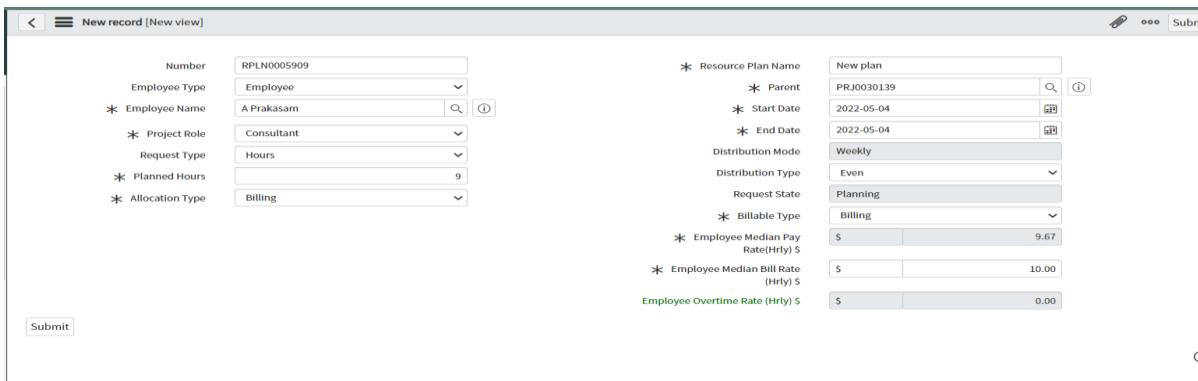
Create a resource plan from the Resource Management application for any task such as Demand, project, project task, incident, problem, or change. Edit and adjust the plan until ready to submit for approval.

As a project Manager for creating a resource plan, create a new Project or verify with any existing or created project

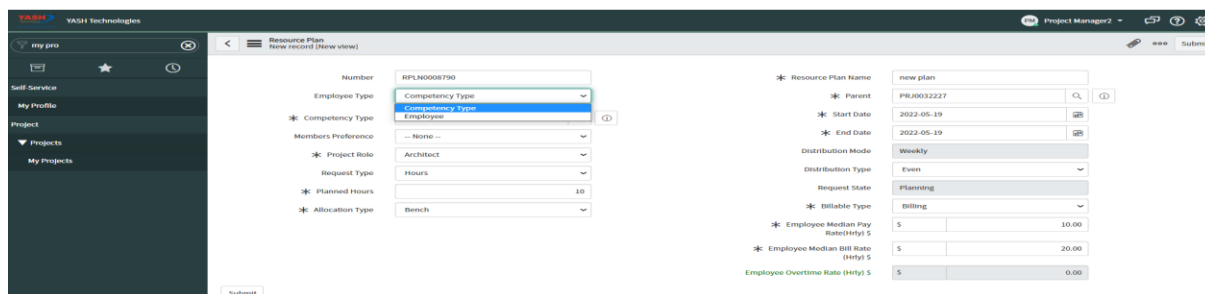
1. Click on **Resource Plan Tab** on the bottom of the screen and Click on new button.



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.

Resource Type: Competency Type

\* Competency Type:

Members Preference:

\* Resource Role:

Request Type:

\* Planned Hours:

ServiceNow

Groups | ServiceNow - Google Chrome

https://yashinmspdev.service-now.com/sys\_user\_group

Groups New Search Name Search

Microsoft

Mobility

Network

NY DB

Program Managers

Reporting & Analytics

ServiceNow

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.

Members Preference:

\* Resource Role:

Request Type:

-- None --

All members

Specific members

Any member

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

\* Project Role

Request Type

Planned Hours

-- None --  
-- None --  
Architect  
Developer  
Tester  
Lead  
Manager  
Trainee

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.

Request Type

\* Planned Hours

hours  
-- None --  
FTE  
Man Days  
hours

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.

servicenow Service Management

Resource Plan New record [New view]

Filter navigator

Self Service

Client Details

Yash Client Entity

Yash Client Group

Customer Service

Demand

Getting Started

Readings

▼ Demands

Workbench

Create New

All

View RAGAC

Project

Resource

Time Sheets

Number RPLN0001854

Resource Type Competency Type

\* Competency Type

Members Preference -- None --

\* Resource Role -- None --

Request Type hours

\* Planned Hours

Name

\* Parent DMN00001271

\* Start Date

\* End Date

Allocation Type Weekly

Allocation Spread Front load

State Planning

\* Billable Type Billing

Resource Rate Override

Resource Pay Rate (hourly) \$ 0.00

Resource Bill Rate Override

Resource Bill Rate \$ 0.00

Resource Overtime Rate Override

Resource Overtime Rate \$ 0.00

Save Submit Create External Hiring



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

\* Billable Type Billing ▼

\* Employee Median Pay Rate(Hrly) \$

\* Employee Median Bill Rate (Hrly) \$

Employee Overtime Rate (Hrly) \$ 0.00

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

Resource Plan  
New record [New view]

Number: RPLN0001812

Resource Type: Competency Type

\* Competency Type: ServiceNow

Members Preference: Any member

Skills: Java, Angular Js, Angular 2x

\* Resource Role: developer

Request Type: hours

\* Planned Hours: 2,400

Name: RPLN0001812:ServiceNow

\* Parent: DMND0001251

\* Start Date: 2021-10-04

\* End Date: 2022-12-31

Allocation Type: Weekly

Allocation Spread: Front load

State: Planning

\* Billable Type: Billing

Resource Rate Override: ☐

Resource Pay Rate(hourly): \$ 20

Resource Bill Rate Override: ☒

Resource Bill Rate: \$ 30

Resource Overtime Rate Override: ☐

Resource Overtime Rate: \$ 0.00

Save Submit

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.

|                    |                 |               |                             |              |              |            |                          |             |         |        |           |              |               |         |                      |            |
|--------------------|-----------------|---------------|-----------------------------|--------------|--------------|------------|--------------------------|-------------|---------|--------|-----------|--------------|---------------|---------|----------------------|------------|
| Resource Plans (1) | WO/SOW          | Expense Lines | Project Tasks               | Sub Projects | Requirements | Stories    | Status Reports           | Risks       | Actions | Issues | Decisions | Stakeholders | CBR Invoicing | Vendors | Resource Details (1) | Time Cards |
| Sprints            | Releases        | Scrum Tasks   | Approvers                   |              |              |            |                          |             |         |        |           |              |               |         |                      |            |
| Resource Plans     | Manage          | New           | Search                      | Created      |              |            |                          |             |         |        |           |              |               |         |                      |            |
| Parent             | Competency Type | Employee Name | Resource Competency Manager | Members List | Start Date   | End Date   | Approval Status          | Planned Hou |         |        |           |              |               |         |                      |            |
| PRJ0030139         | ServiceNow      | (empty)       | Bharat Nutakki              |              | 2022-05-04   | 2022-05-04 | Approval Pending From DM |             |         |        |           |              |               |         |                      |            |
|                    |                 |               |                             |              |              |            | Sum                      |             |         |        |           |              |               |         |                      |            |

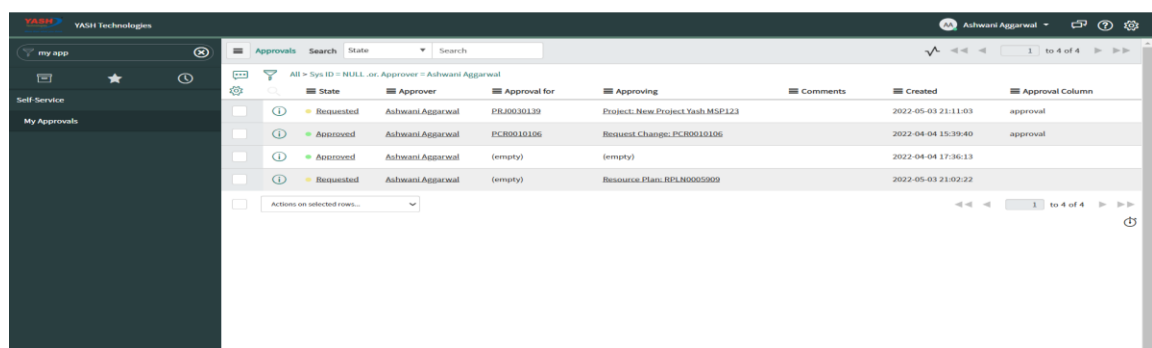
12. If Resource plan will create under Project and sent for approval from Delivery manager then the Email/notification will trigger as below



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

## Resource Plan is Approved: RPLN0008792



Digital Workflows <yashinmsptest@service-now.com>  
To: Integrationptg Notification

Wed 5/18/2022 8:19 PM

Hi Project Manager1,

Your resource plan is approved by Ashish Kabra, request you to please review the below information.

Resource Plan ID: **RPLN0008792**

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

Link : [Click here](#)

Regards,

PMO

[Unsubscribe](#) | [Notification Preferences](#)

Ref:MSG0175616\_XYeH4E8sCy041mb7mraV

[What is this?](#)

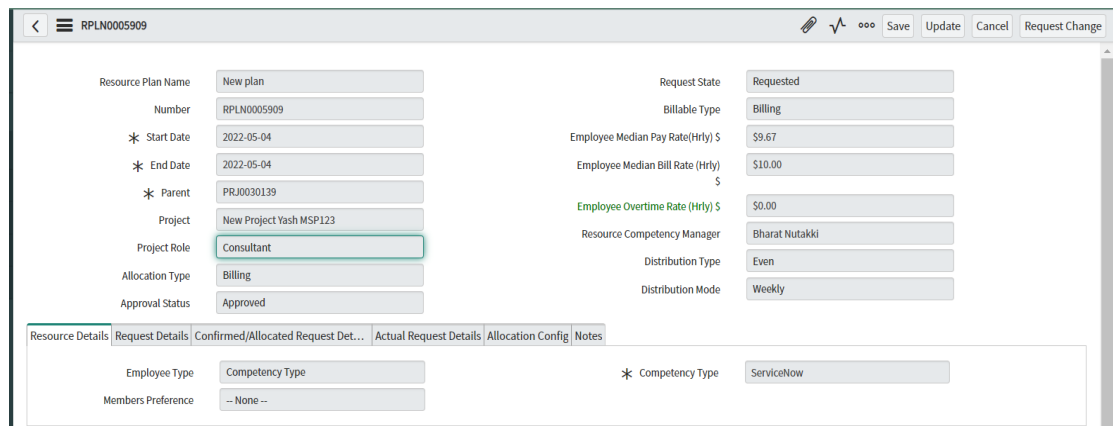
[Do you know what this is?](#)

[Did you get this?](#)

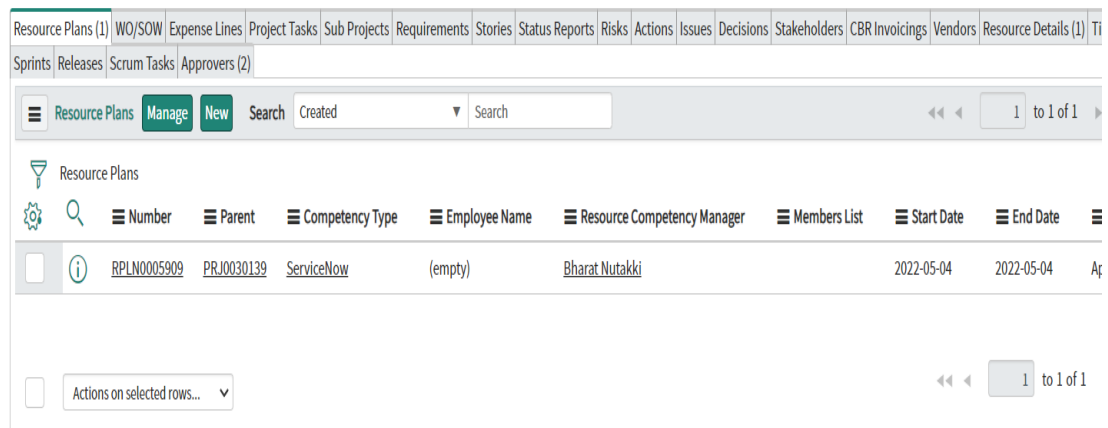
Are the suggestions above helpful? [Yes](#) [No](#)

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.



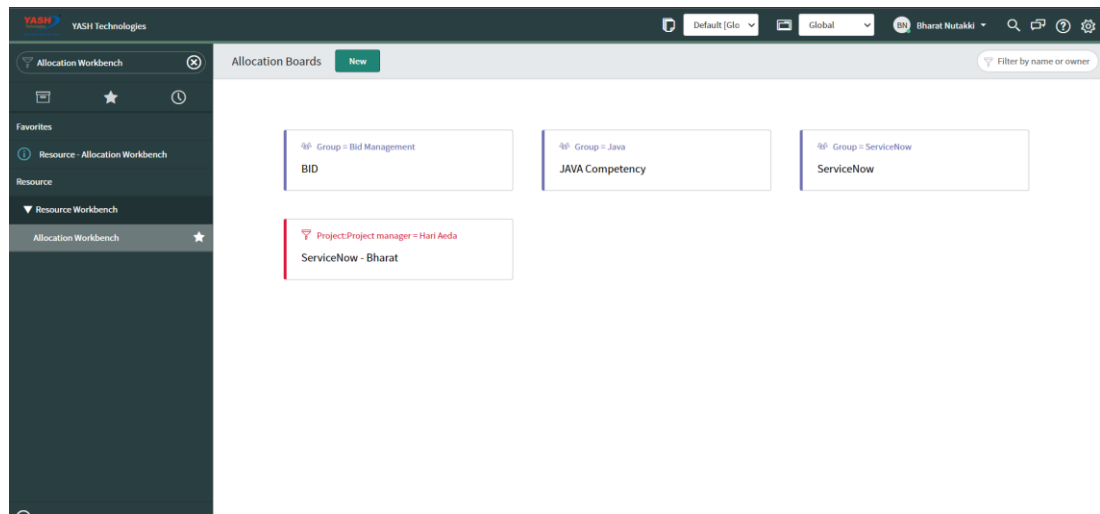
| Resource Plans (1) | WO/SOW     | Expense Lines | Project Tasks | Sub Projects   | Requirements | Stories    | Status Reports | Risks | Actions | Issues | Decisions | Stakeholders | CBR Invoicing | Vendors | Resource Details (1) | TI |
|--------------------|------------|---------------|---------------|----------------|--------------|------------|----------------|-------|---------|--------|-----------|--------------|---------------|---------|----------------------|----|
| RPLN0005909        | PRJ0030139 | ServiceNow    | (empty)       | Bharat Nutakki | 2022-05-04   | 2022-05-04 | Ap             |       |         |        |           |              |               |         |                      |    |

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

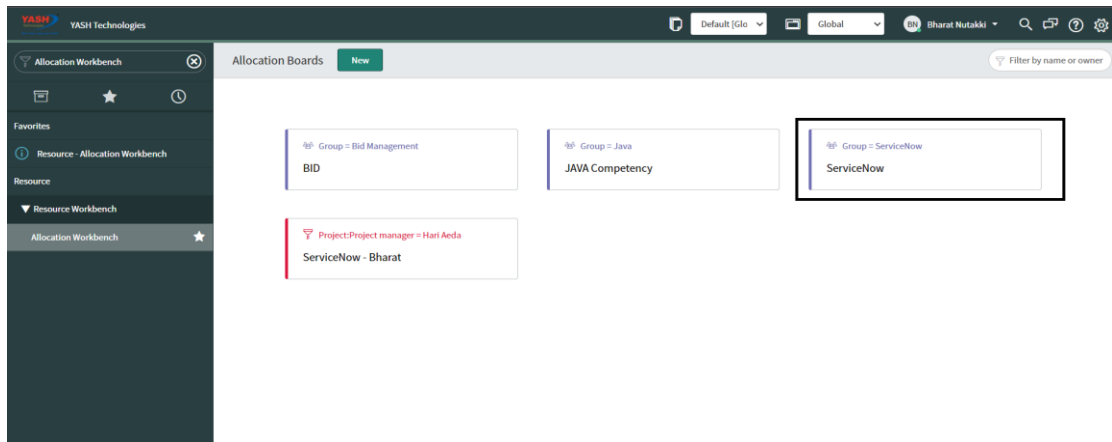


## Resource Allocation by Competency manager

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.

The 'Create new' dialog box is shown over the 'Allocation Boards' interface. It contains the following fields:

- Name**: A text input field with a red asterisk indicating it is mandatory.
- Type**: A dropdown menu currently set to 'Group'.
- Group**: A dropdown menu with the text 'Select a group' and a red asterisk indicating it is mandatory.

Buttons at the bottom right are 'Cancel' and 'Create'.

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.

The 'Allocation workbench' screen displays a list of resources on the left sidebar and a main grid showing availability details. The grid columns represent months from Jan 2022 to Apr 2022, with sub-columns for 'Planned', 'Conf/Alloc', and 'Total'. The resources listed include:

- KT Demand
- New Demo Yash MSP 123455
- New MSP Details 123-UAT
- [C] ServiceNow (10 Hours, Requested)
- New Project Yash MSP123
- P6
- Pri test Proj
- Proj 1
- Project Cycle 22
- SNI ServiceNow Support
- Test - Rishindra302022
- Testing Project
- UAT Testing Yash MSP
- Yash MSP Demo 123455

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.



The screenshot shows the YASH Technologies Resource Allocation Workbench. The main table lists resource allocation requests with columns for months from Jan 2022 to Apr 2022 and a 'Total' column. A 'Confirm' button is highlighted with a red box. Below the table, there is a section for 'Group -> User -> Task' with a table showing confirmed, allocated, and availability for various users.

| Group -> User -> Task | Confirmed | Allocated | Availability |
|-----------------------|-----------|-----------|--------------|
| ServiceNow            | 965       | 1,948     | 2,015        |
| Ayushi Tandon         |           | 52        | 146          |
| Aza Sved Akber Ali    |           | 330       | -132         |

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

**Resource Request Soft Locked: RPLN0008792**

**DW** Digital Workflows <yashinmsptest@service-now.com> To: Integrationptg Notification Wed 5/18/2022 8:32 PM

Hi Project Manager1,

Your Resource Request has been confirmed (Soft locked).  
Click on the link below to view the details.  
Resource plan ID:  
**Project Name: New MSP Details 123-UAT**  
**Link: [Click here](#)**

**Regards,**  
**PMO**

**[Unsubscribe](#) | [Notification Preferences](#)**

Ref:MSG0175620\_P1yITiupYYzXlIFXJerv

[Received, and accepted.](#) [I confirm.](#) [Who is the client?](#)

Are the suggestions above helpful? [Yes](#) [No](#)

[Reply](#) [Forward](#)

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.

The screenshot displays the YASH Technologies Allocation Workbench interface. The top navigation bar includes the YASH logo, user profile (Bharat Nutakki), and various settings. The main area shows a resource allocation grid for May 2022. A context menu is open over the 'Aayushi Tandon' resource, showing options: Cancel, Change State, Allocate, Move Resource Plan, Go to Start Date, and Delete. The 'Allocate' option is highlighted.

| Resource name                     | Planned | State | Jan 2022 | Feb 2022 | Mar 2022 | Apr 2022 | Total |
|-----------------------------------|---------|-------|----------|----------|----------|----------|-------|
| KT Demand                         |         |       |          |          |          |          |       |
| New Demo Yash MSP 123455          |         |       |          |          |          |          |       |
| New MSP Details 123-UAT           |         |       |          |          |          |          |       |
| [C] ServiceNow 10 Hours Confirmed |         |       |          |          |          |          |       |
| Aayushi Tandon                    |         |       |          |          |          |          |       |

| Group → User → Task  | Confirmed | Allocated | Availability |
|----------------------|-----------|-----------|--------------|
| ServiceNow           | 973       | 1,948     | 2,007        |
| ▶ Aayushi Tandon     | 8         | 52        | 118          |
| ▶ Aga Syed Akber Ali |           | 330       | -132         |
| ▶ Alex Ray           | 153       |           | 45           |

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



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](#)

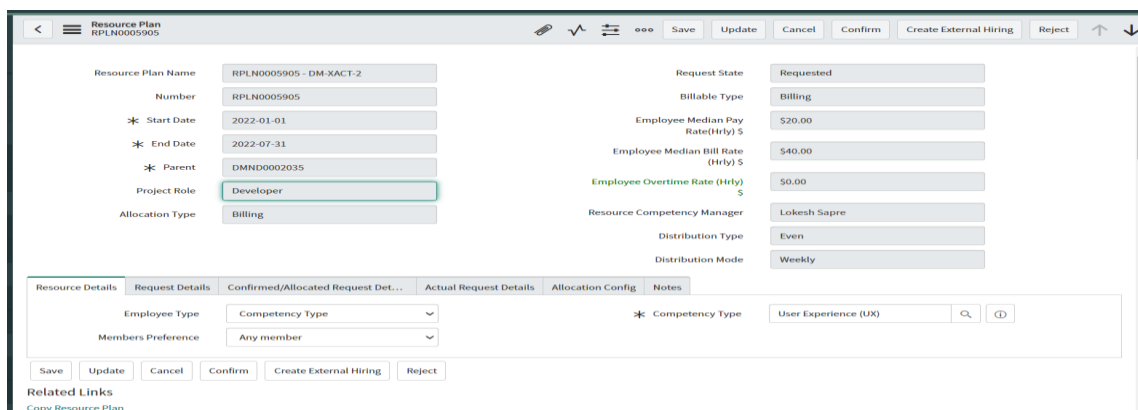
[→ Forward](#)

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

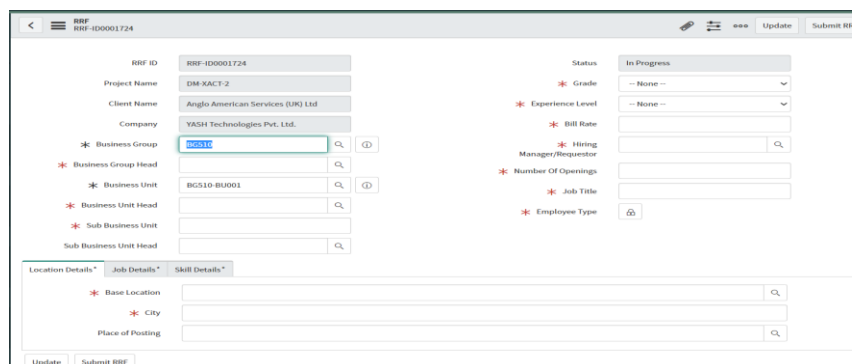
Resource Manager has the option of creating external hiring requests from within Service Now against a resource request (from demand or project). This information from SNOW flows to SAP Success Factors Recruiting (RCM) - (Infogram) and the Competency Manager will then have to enter other required fields/manage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



The screenshot shows the 'Resource Plan' form for RPLN0005905. The form is divided into two main sections: 'Resource Plan Details' and 'Request Details'. The 'Resource Plan Details' section includes fields for Resource Plan Name, Number, Start Date, End Date, Parent, Project Role, and Allocation Type. The 'Request Details' section includes fields for Request State, Billable Type, Employee Median Pay Rate (Hrly), Employee Median Bill Rate (Hrly), Employee Overtime Rate (Hrly), Resource Competency Manager, Distribution Type, and Distribution Mode. Below these sections are tabs for 'Resource Details', 'Request Details', 'Confirmed/Allocated Request Det...', 'Actual Request Details', 'Allocation Config', and 'Notes'. The 'Request Details' tab is active, showing fields for Employee Type, Competency Type, and Members Preference. At the bottom, there are buttons for 'Save', 'Update', 'Cancel', 'Confirm', 'Create External Hiring', and 'Reject'. A 'Related Links' section at the bottom left contains a link to 'Copy Resource Plan'.

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



The screenshot shows the 'RRF' form for RRF-ID0001724. The form is divided into two main sections: 'RRF Details' and 'RRF Configuration'. The 'RRF Details' section includes fields for RRF ID, Project Name, Client Name, Company, Business Group, Business Group Head, Business Unit, Business Unit Head, Sub Business Unit, and Sub Business Unit Head. The 'RRF Configuration' section includes fields for Status, Grade, Experience Level, Bill Rate, Hiring Manager/Requestor, Number Of Openings, Job Title, and Employee Type. Below these sections are tabs for 'Location Details\*', 'Job Details\*', and 'Skill Details\*'. The 'Job Details\*' tab is active, showing fields for Base Location, City, and Place of Posting. At the bottom, there are buttons for 'Update' and 'Submit RRF'.

### 3. Capture the Grade requirements

\* Grade

Experience Level

\* Bill Rate

Manager/Requestor

Number Of Openings

\* Job Title

Employee Type

-- None --

-- None --

Grade AT (AT)

Grade C (C)

Grade E1 (E1)

Grade E2 (E2)

Grade E3 (E3)

Grade E4 (E4)

Grade E5 (E5)

Grade E6 (E6)

Grade M1 (M1)

Grade M2 (M2)

Grade M3 (M3)

Grade T (T)

### 4. Capture the experience level

Experience Level

\* Bill Rate

Manager/Requestor

Number Of Openings

\* Job Title

\* Employee Type

-- None --

-- None --

0-1 Year

1-3 Years

3-5 Years

5-8 Years

8-11 Years

11-14 Years

11-15 Years

14 - 18 Years

18+ Years

### 5. Select job category and other details

Location Details

Job Details\*

Skill Details\*

\* Job Start Date

\* External title

\* Recruiter

\* Job category

-- None --

Audits & Legal

Customer Service

Finance & Accounting

Human Resource

Information Technology

Logistics / Facilities

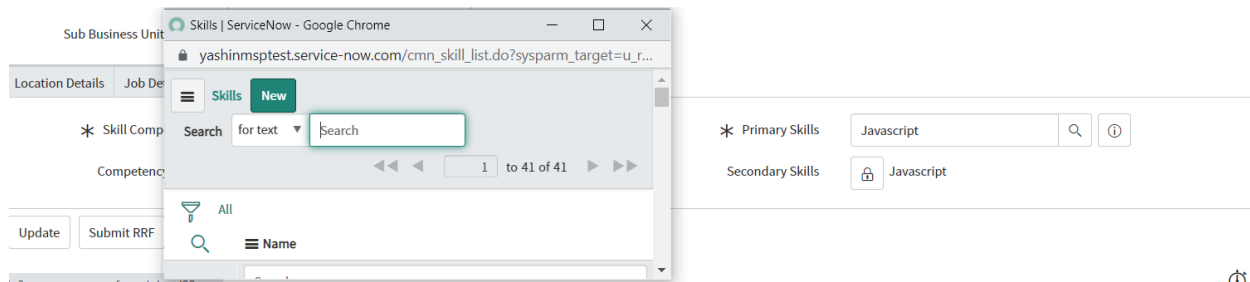
Operations & Administration

Sales & Marketing

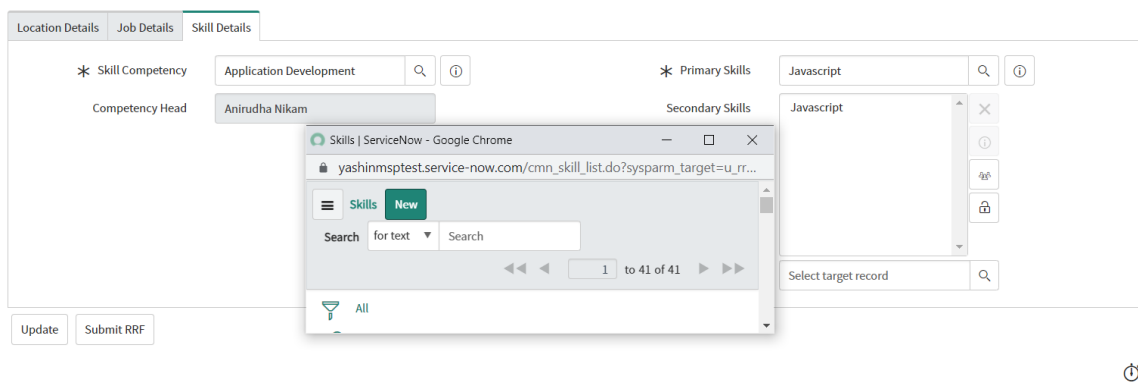
Travel Desk

Operations & Administration

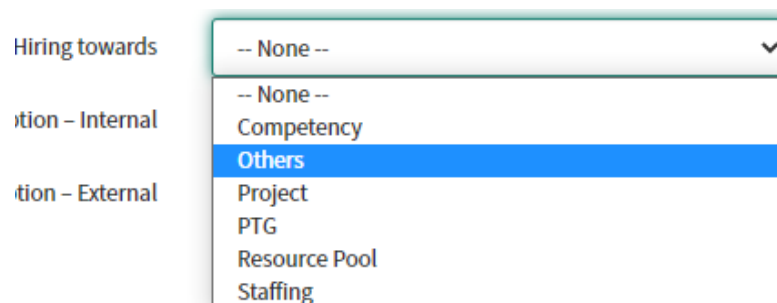
6. Capture skill requirements from the skill master data available on SNOW



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 platform and can verify with created RRF ID.

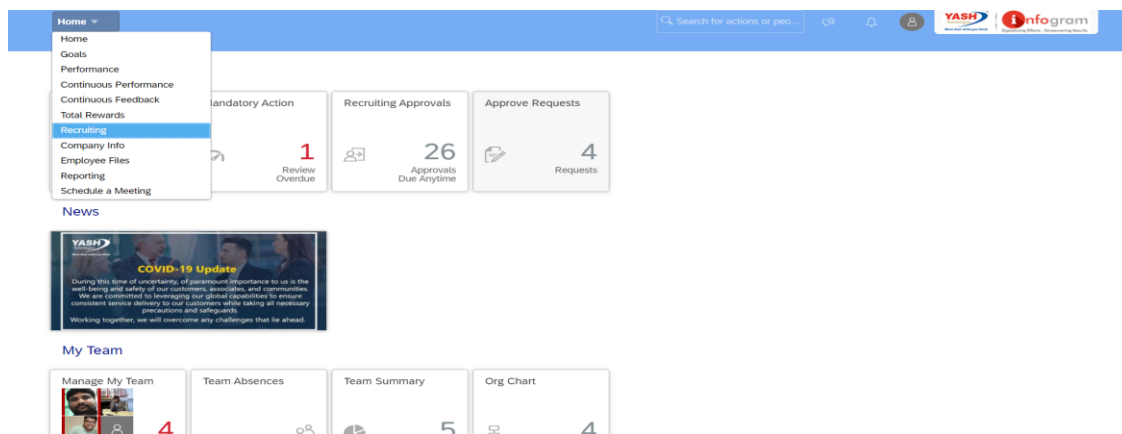


## Competency Manager on RCM Module

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

Recruiting ▾

Job Requisitions Preferences Interview Central Marketing Message Center

Job Requisitions

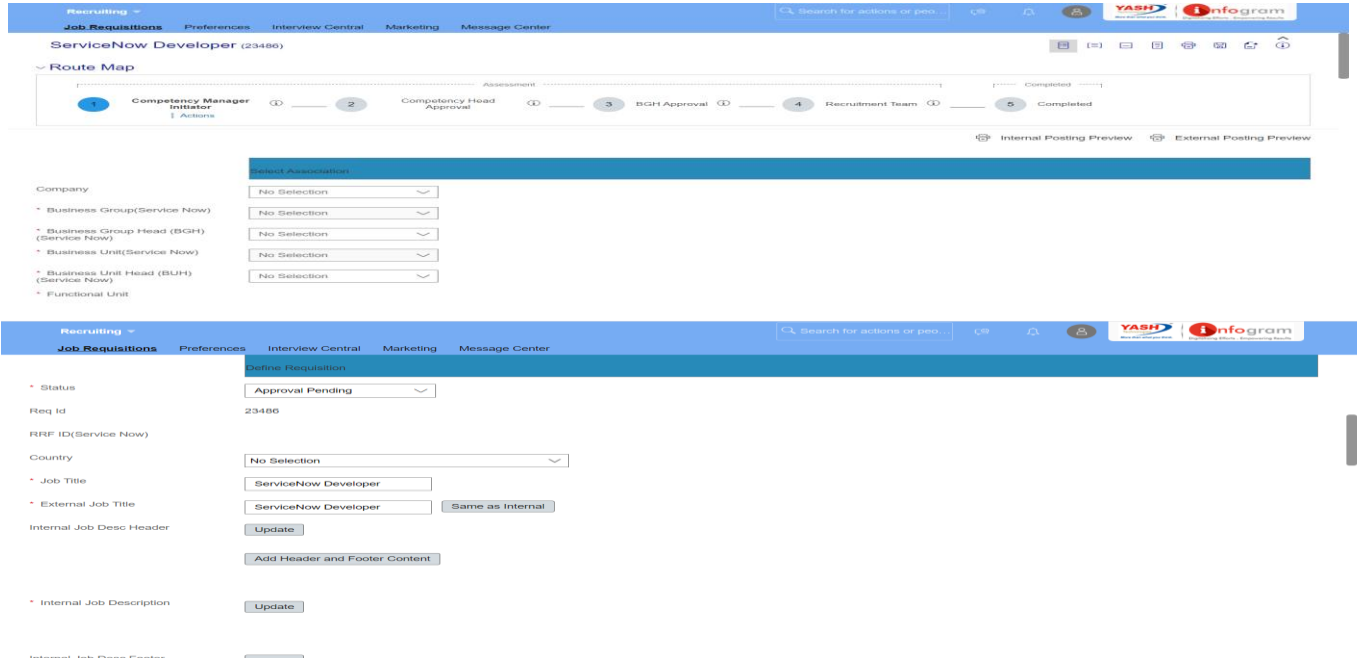
Requisition Statistics

17 Candidates Forwarded 7 New Candidates 0 Current External Requisitions 0 Current Internal Requisitions Average Days Open 100

Items per page 10 Page 1 of 6

| Select All               | Job Title            | Req Id | Hiring Manager | Recruiter     | Currently With | Due        | Candidates | Progress | Updated    | Age(Days) |
|--------------------------|----------------------|--------|----------------|---------------|----------------|------------|------------|----------|------------|-----------|
| <input type="checkbox"/> | Test_Dev_05          | 23490  | Bharat Nutakki | Sonali Biswal | Bharat Nutakki | 05/26/2022 | -          |          | 04/26/2022 | -         |
| <input type="checkbox"/> | Tester               | 23489  | Bharat Nutakki | Sonali Biswal | Bharat Nutakki | 05/26/2022 | -          |          | 04/26/2022 | -         |
| <input type="checkbox"/> | Test_BA              | 23488  | Bharat Nutakki | Sonali Biswal | Bharat Nutakki | 05/26/2022 | -          |          | 04/26/2022 | -         |
| <input type="checkbox"/> | Architest_01         | 23487  | Bharat Nutakki | Sonali Biswal | Bharat Nutakki | 05/26/2022 | -          |          | 04/26/2022 | -         |
| <input type="checkbox"/> | ServiceNow Developer | 23486  | Bharat Nutakki | Sonali Biswal | Bharat Nutakki | 05/26/2022 | -          |          | 04/25/2022 | -         |
| <input type="checkbox"/> | Test_Dev_06          | 23485  | Bharat Nutakki | Sonali Biswal | Bharat Nutakki | 05/25/2022 | -          |          | 04/25/2022 | -         |
| <input type="checkbox"/> | Test_Dev_05          | 23482  | Bharat Nutakki | Sonali Biswal | Bharat Nutakki | 05/25/2022 | -          |          | 04/25/2022 | -         |
| <input type="checkbox"/> | Test_Dev_03          | 23481  | Bharat Nutakki | Sonali Biswal | Bharat Nutakki | 05/25/2022 | -          |          | 04/24/2022 | -         |
| <input type="checkbox"/> | Job_Dev_02           | 23480  | Bharat Nutakki | Sonali Biswal | Bharat Nutakki | 05/25/2022 | -          |          | 04/24/2022 | -         |
| <input type="checkbox"/> | Test_Analyst         | 23466  | Bharat Nutakki | Sonali Biswal | Bharat Nutakki | 05/22/2022 | -          |          | 04/22/2022 | -         |

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



**Recruiting** ▾  
**Job Requisitions** | Preferences | Interview Central | Marketing | Message Center

Search for actions or people

**ServiceNow Developer (23486)**

**Route Map**

1 **Competency Manager Initiator** | 2 **Competency Head Approval** | 3 **BGH Approval** | 4 **Recruitment Team** | 5 **Completed**

Internal Posting Preview | External Posting Preview

**Select Association**

Company: No Selection ▾

\* Business Group(Service Now): No Selection ▾

\* Business Group Head (BGH) (Service Now): No Selection ▾

\* Business Unit(Service Now): No Selection ▾

\* Business Unit Head (BUH) (Service Now): No Selection ▾

\* Functional Unit: No Selection ▾

**Define Requisition**

Status: Approval Pending ▾

Req Id: 23486

RRF ID(Service Now):

Country: No Selection ▾

\* Job Title: ServiceNow Developer

\* External Job Title: ServiceNow Developer | Same as Internal

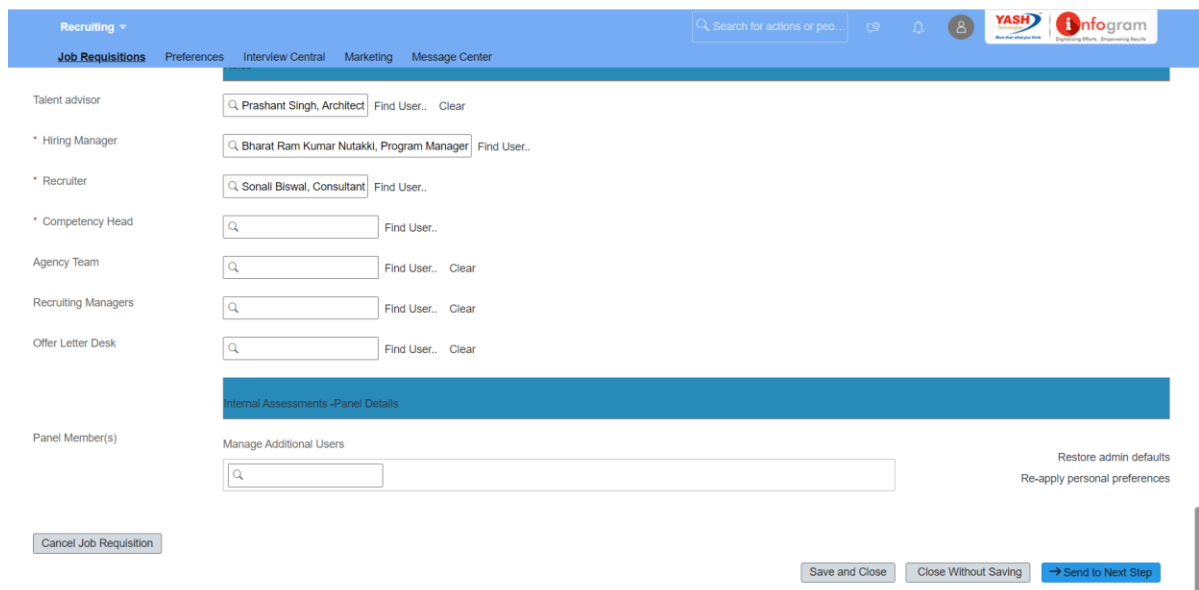
Internal Job Desc Header: Update

Add Header and Footer Content

\* Internal Job Description: Update

Internal Job Desc Header:

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



**Recruiting** ▾  
**Job Requisitions** | Preferences | Interview Central | Marketing | Message Center

Search for actions or people

Talent advisor:  Find User.. Clear

\* Hiring Manager:  Find User..

\* Recruiter:  Find User..

\* Competency Head:  Find User..

Agency Team:  Find User.. Clear

Recruiting Managers:  Find User.. Clear

Offer Letter Desk:  Find User.. Clear

**Internal Assessments -Panel Details**

Panel Member(s):

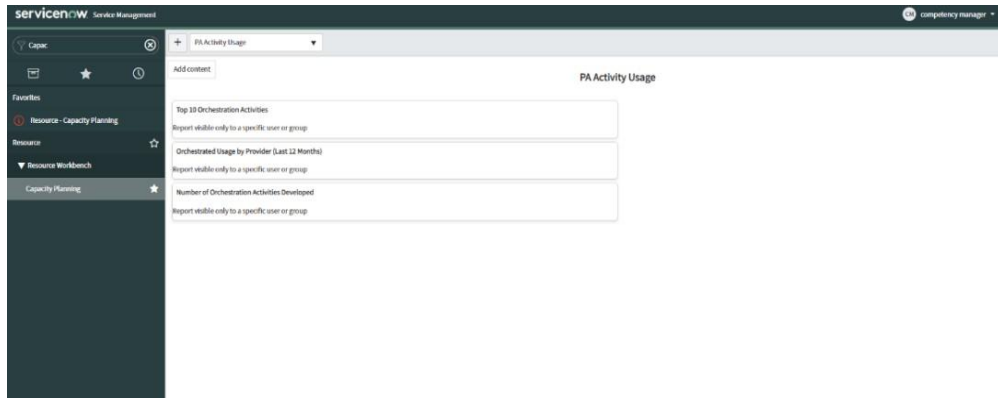
Restore admin defaults  
Re-apply personal preferences

Cancel Job Requisition

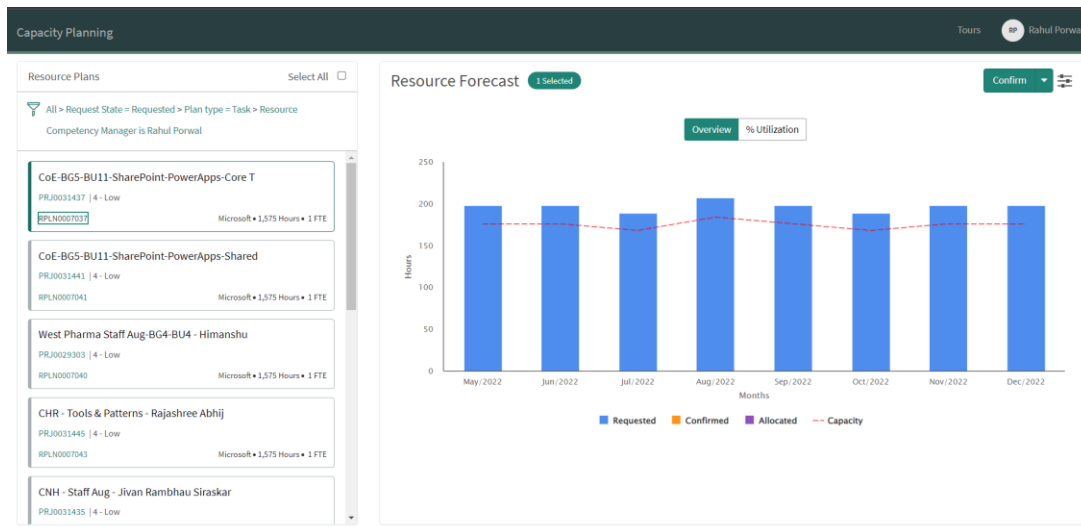
Save and Close | Close Without Saving | **Send to Next Step**

## How to View Capacity Planning: Competency Manager

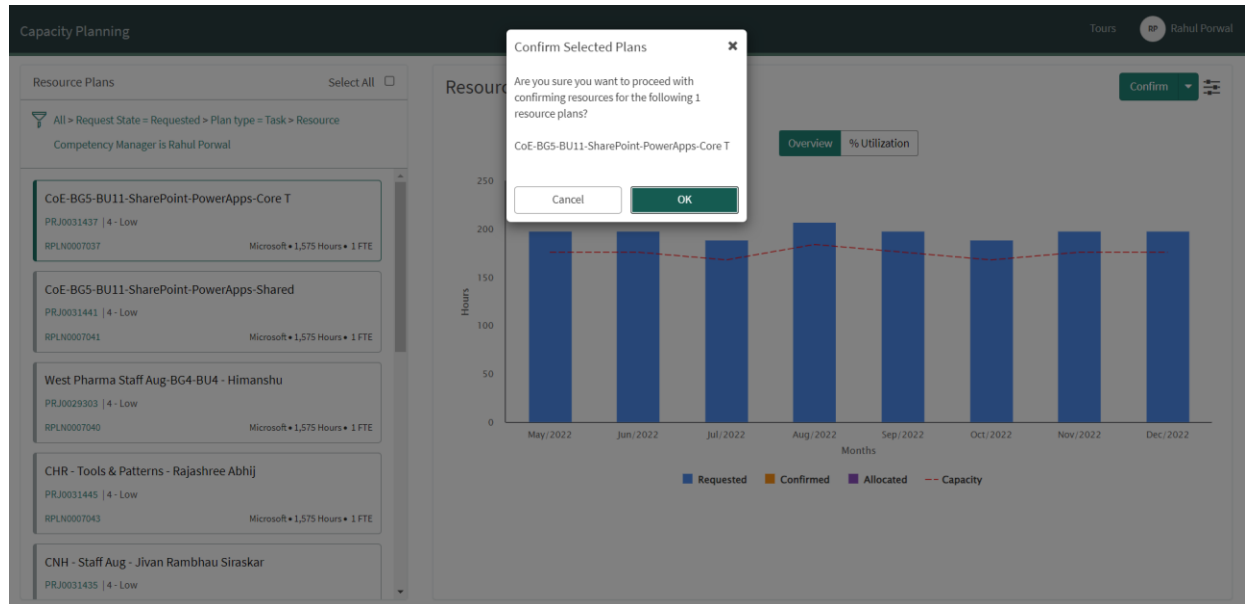
1. Click on the home page and using the filter navigator, search for Capacity Planning



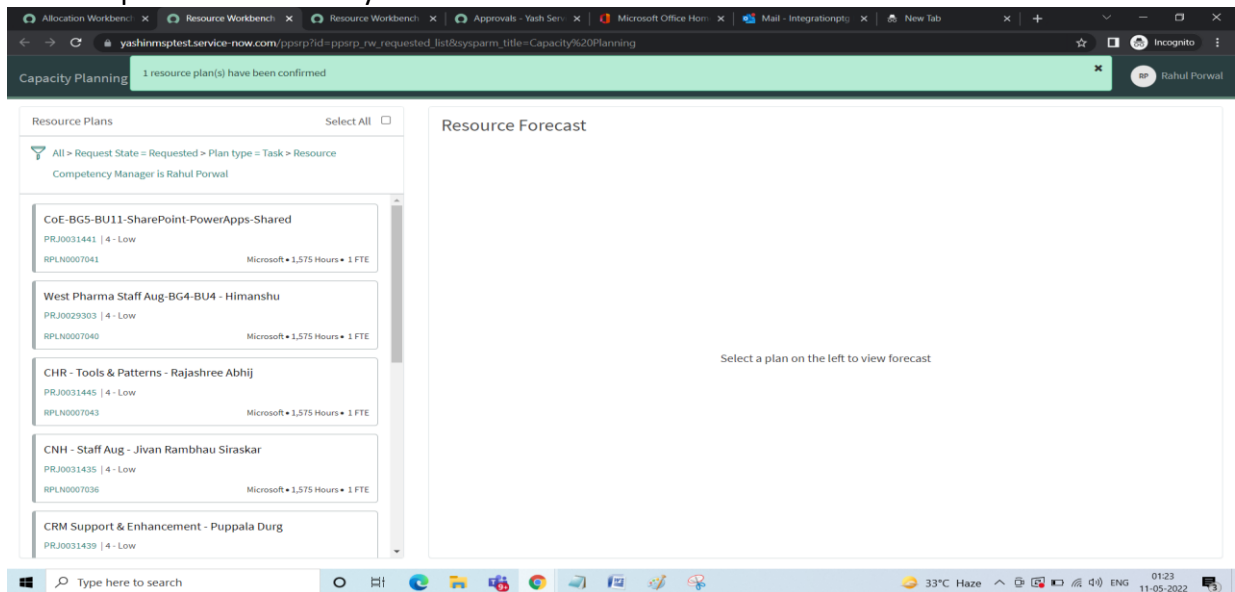
2. Click on **Capacity Planning** and the landing page will load where Resource Forecast will be visible. Click on **Confirm** based on availability.



- Click **Okay** on the pop up screen, based on availability.  
Once approved, the state will change to confirmed



- 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 Delivery 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 Employee 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 contract 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 > Click 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