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User Manual

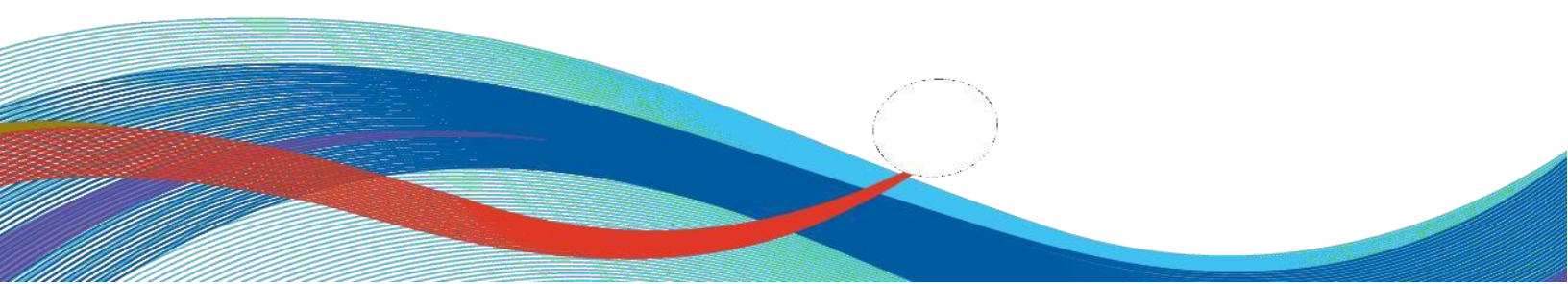
Demand Management

Powered By – Service Now

Created By – XACT Product Team

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XACT Demand Management ~ User Manual

Purpose:

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

Scope:

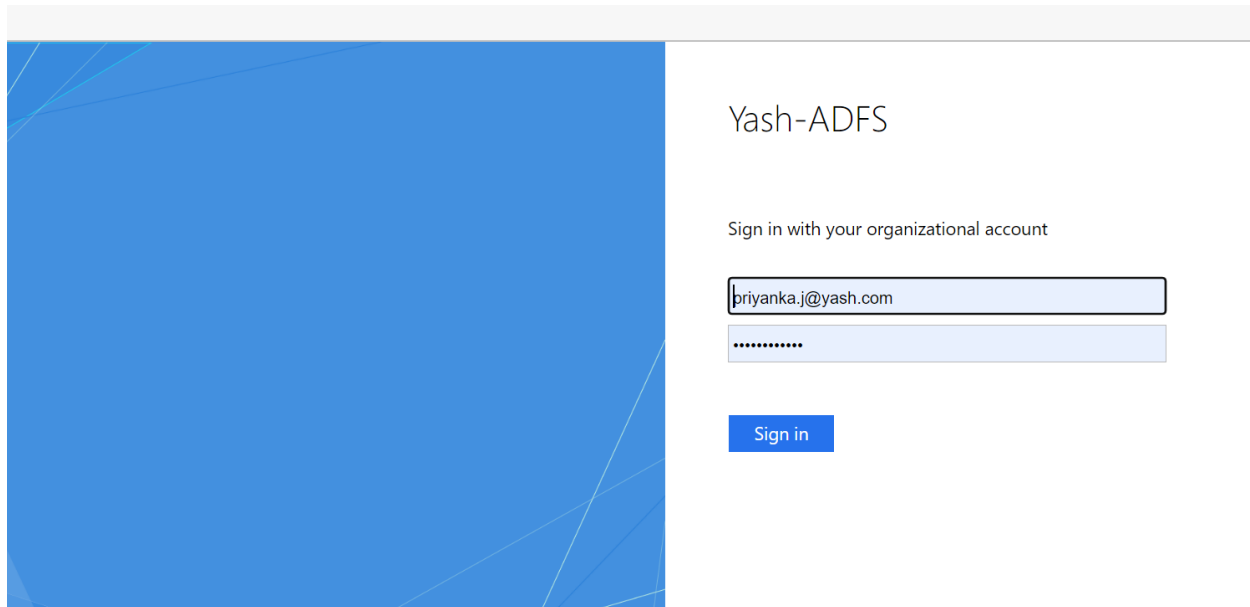
This document contains the steps to create the demand and update details of demand on service now.

Roles:

Delivery manager, Demand manager

Walkthrough on Service Now

Prod link: <https://yashinmsp.service-now.com/>

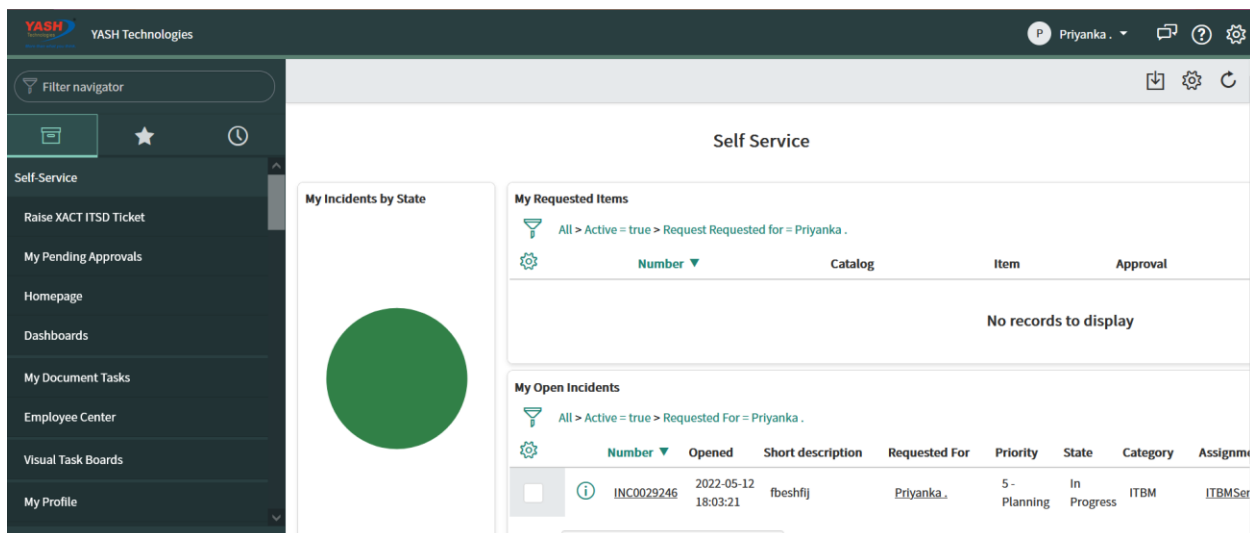


Yash-ADFS

Sign in with your organizational account

[Sign in](#)

Landing Page should show below screen as per your role.



Self Service

My Incidents by State

My Requested Items

All > Active = true > Request Requested for = Priyanka .

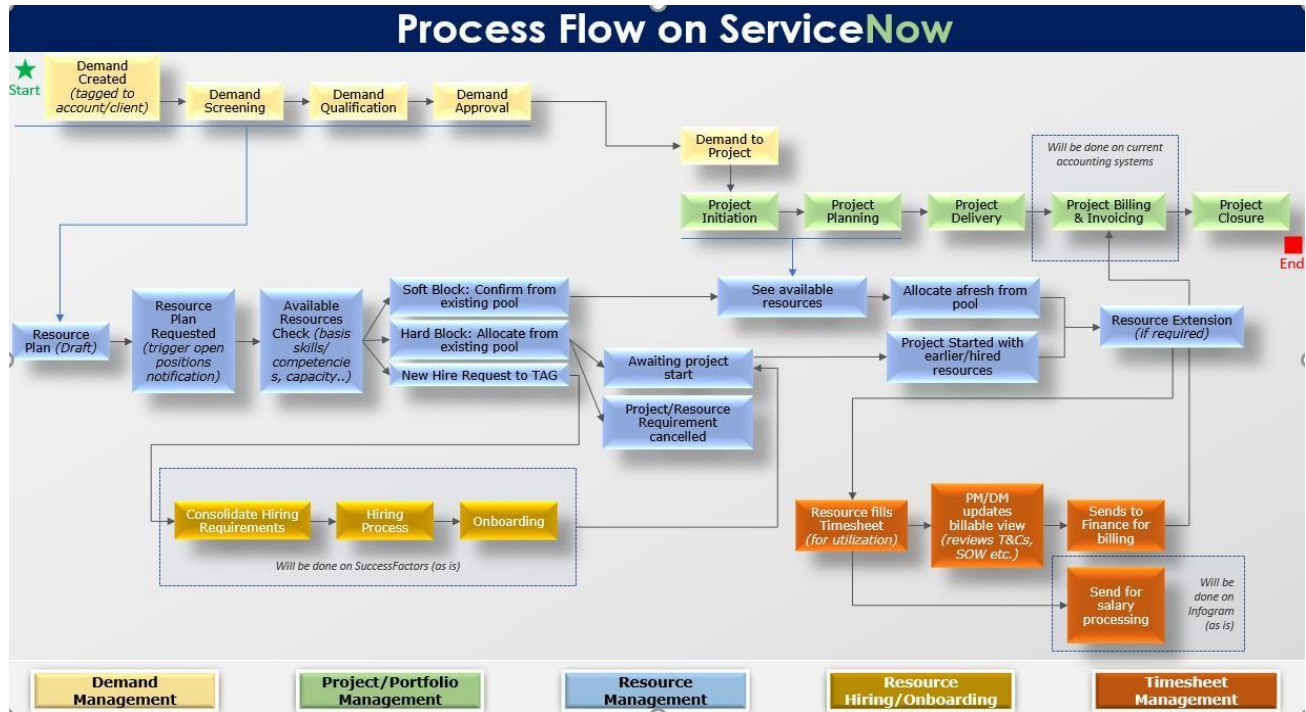
Number	Catalog	Item	Approval
No records to display			

My Open Incidents

All > Active = true > Requested For = Priyanka .

Number	Opened	Short description	Requested For	Priority	State	Category	Assignme
INC0029246	2022-05-12 18:03:21	fbesbfij	Priyanka .	5 - Planning	In Progress	ITBM	ITBMSer

ServiceNow Process Flow Overview:



Demand Management:

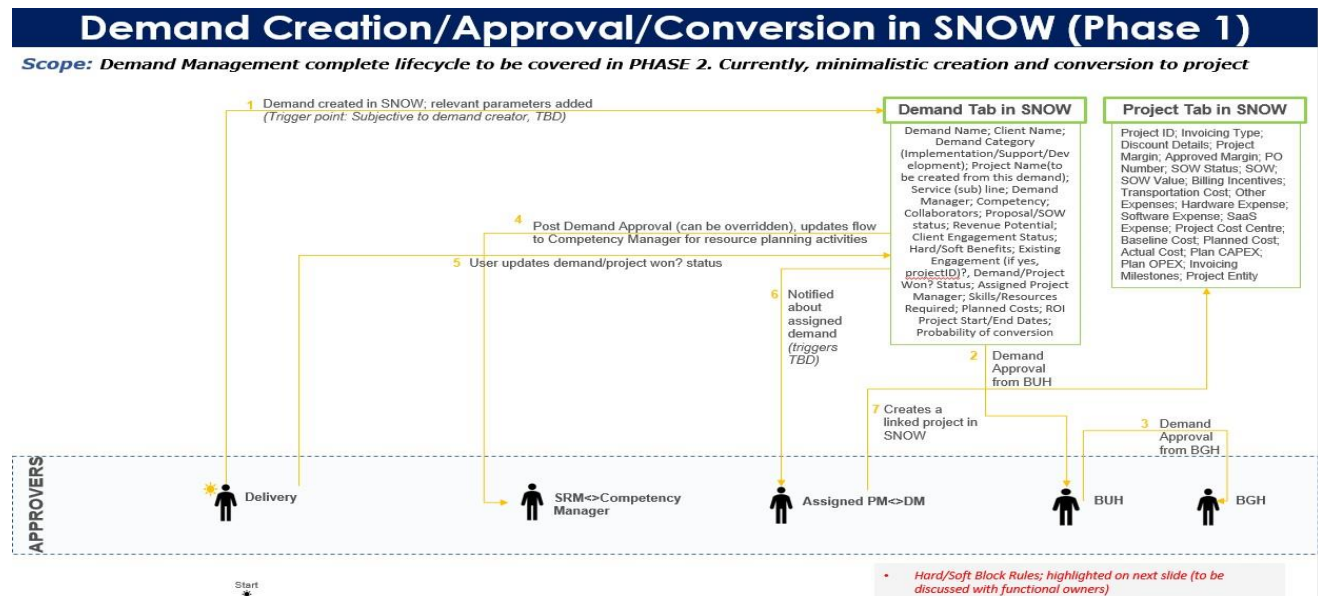
The Demand Management application consists of tools that help in capturing, centralizing and assessing strategic and operational demands. It also provides a single location for managing all demand information.

As a demand manager, assess the ideas submitted through the Idea Portal or ideation module and promote the feasible ideas to demands, this tool allows the demand manager to track the progress of an accepted idea as it moves through the demand life cycle (idea to a demand, to a project, enhancement, change or defect).

A typical workflow for a demand manager is as follows:

- Work on a demand to assess the feasibility, effort, and cost of the demand and create a business case for approval of the demand.

Demand Management Process Flow



Creating a Demand (Demand/Delivery Manager):

Before you begin

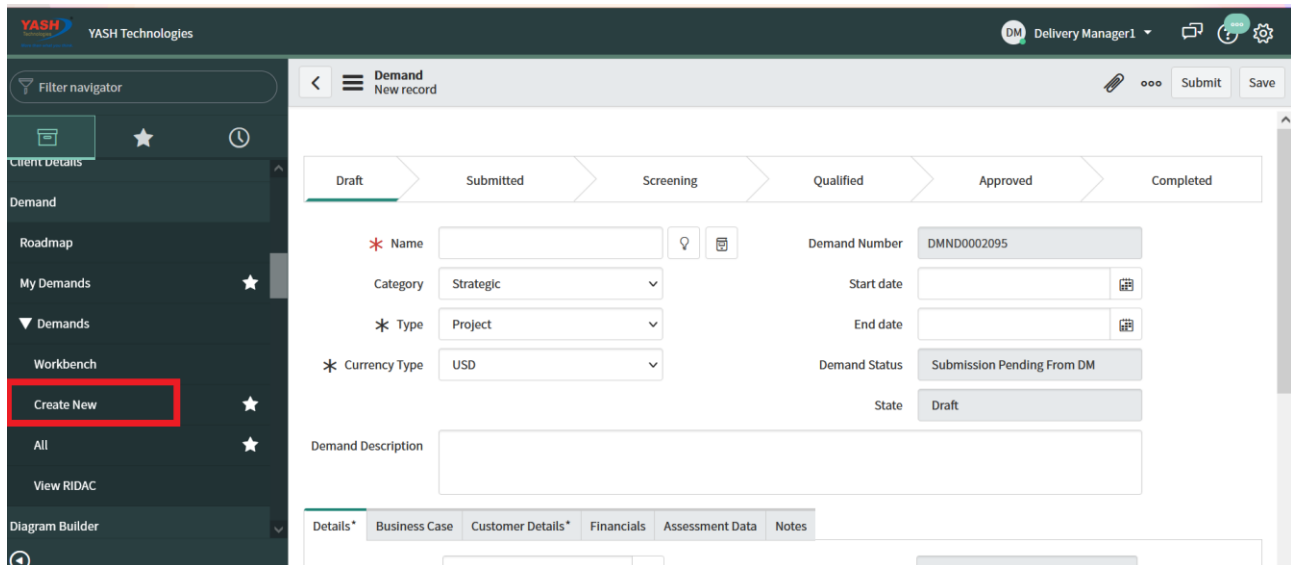
Role required: Delivery Manager

Create demand to capture your strategic and operational demands.

Procedure

The demand manager can also create a demand from the demand workbench. Demands created from the demand workbench are created in a qualified state.

1. On the left-hand side navigator, navigate to Demand and click on **Create New**.



The screenshot displays the YASH Technologies Demand Manager interface. On the left-hand side, a dark-themed sidebar contains a 'Filter navigator' at the top. Below it, a list of navigation items is shown: 'Client Details', 'Demand', 'Roadmap', 'My Demands', 'Demands', 'Workbench', 'Create New' (highlighted with a red rectangle), 'All', 'View RIDAC', and 'Diagram Builder'. The main content area is titled 'Demand New record' and features a breadcrumb trail: 'Draft' > 'Submitted' > 'Screening' > 'Qualified' > 'Approved' > 'Completed'. The 'Draft' step is currently active. The form includes several input fields: 'Name' (with a red asterisk), 'Category' (set to 'Strategic'), 'Type' (set to 'Project'), 'Currency Type' (set to 'USD'), 'Demand Number' (DMND0002095), 'Start date', 'End date', 'Demand Status' (Submission Pending From DM), and 'State' (Draft). A 'Demand Description' text area is also present. At the bottom, a tabbed interface shows 'Details*' as the active tab, with other tabs including 'Business Case', 'Customer Details*', 'Financials', 'Assessment Data', and 'Notes'.

- On the **Demand Form**, fill in the fields enter all the information in the mandatory fields.

YASH Technologies Demand New record

Progress: Draft > Submitted > Screening > Qualified > Approved > Completed

Mandatory Fields:

- Name:
- Category:
- Type:
- Currency Type:
- Demand Number:
- Start date:
- End date:
- Demand Status:
- State:
- Service Line:
- Sub-Service Type:
- Demand manager:
- Project Manager:
- GEOS:

Details Business Case Customer Details Financials Assessment Data Notes

BG	BG2
BU	BG2-BU9
BGH/SSGH	BG User1
BUH/SSUH	BU User1

Submit Save

- Fill in the details like Name, Category, Type, Currency Type, Start date, End date and Demand Description.

a. Enter unique text or use the look-up table to find the relevant value from the list.

YASH Technologies Demand New record

Progress: Draft > Submitted > Screening > Qualified > Approved > Completed

Mandatory Fields:

- Name:
- Category:
- Type:
- Currency Type:
- Demand Number:
- Start date:
- End date:
- Demand Status:
- State:
- Service Line:
- Sub-Service Type:
- Demand manager:
- Project Manager:
- GEOS:

Details Business Case Customer Details Financials Assessment Data Notes

BG	BG2
BU	BG2-BU9
BGH/SSGH	BG User1
BUH/SSUH	BU User1

Submit Save

- Under **Details** tab provide information of Portfolio/Service line, Program/Sub-Service line, Demand manager, Program manager, GEOS(Region). BG, BU, BGH/SSGH, BUH/SSUH values are automatically populated according to the Demand manager selected.

b. Type for suggestion-based search or Select the appropriate value from the look-up list for Service line, Sub Service type and Project manager.

Field	Value
Service Line	
Sub-Service Type	
Demand manager	Delivery Manager1
Project Manager	
GEOS	-- None --

BG	BG2
BU	BG2-BU9
BGH/SSGH	BG User1
BUH/SSUH	BU User1

- Under **Business Case** record business arguments that support the demand.

- Under Customer Details, enter the Customer Name by typing for suggestion-based search or use the look-up table to find the relevant value from the list.

Details* Business Case Customer Details* Financials Assessment Data Notes

* Customer Name

Customer Manager

Customer Location

Country

Zip / Postal Code

Customer Group

Customer Code

City

State / Province

Customer Industry

SEZ

YASH Technologies

Demand New record

Demand Description

Details* Business Case Customer Details* Financials Assessment Data Notes

* Customer Name

Customer Manager

Customer Location

Country

Zip / Postal Code

Customer Group

Contacts | ServiceNow — Mozilla Firefox

https://yashinmsptest.service-now.com/customer_contact_list.do?sysparm_target=dmn_demand.u_client_nar

Contacts Search Customer Name

1 to 100 of 654

Customer Name	Customer Group	Customer Email Id	Business phone	Active
Anglo American Services (UK) Ltd	(empty)			true
Arlon Graphics, LLC	(empty)			true
Assam Bio Refinery Private Limited	Others			true
Assam Medical College	Others			true
Asset Reconstruction Company (India) Ltd	Others			true
ATC Tires Pvt. Ltd.	Others			true
Atos Services (M) Sdn Bhd	Atos Services			true
Aurangabad Electricals Ltd	Others			true
Auto Europe	Others			true

- Under Financials, Total Demand Value and Total Planned Resource cost are auto populated.

Details Business Case Customer Details Financials Assessment Data Notes

Total Demand Value

Other Planned Cost \$

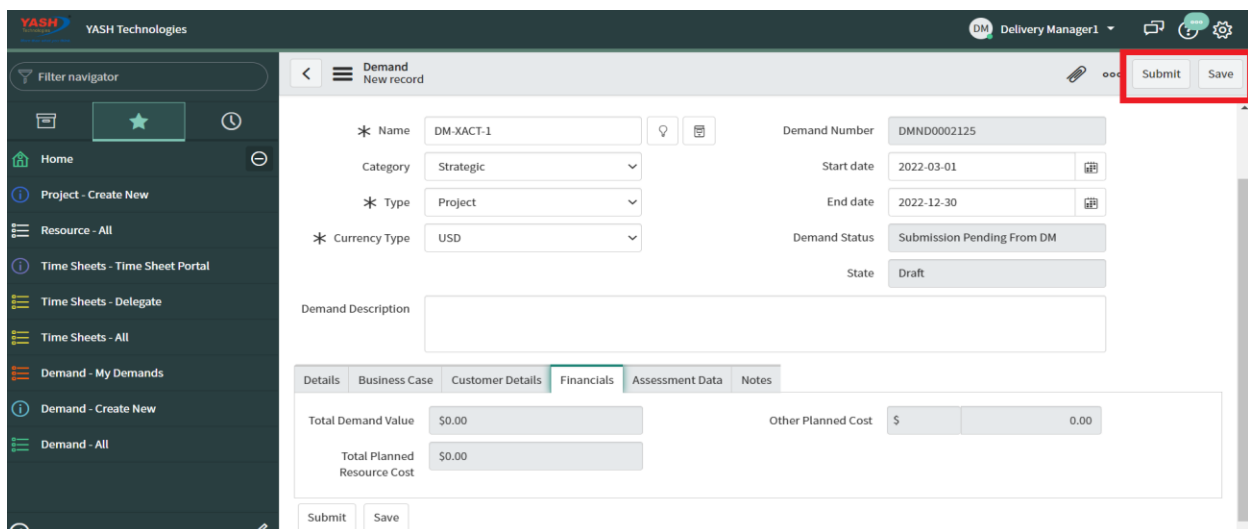
Total Planned Resource Cost

8. Fill in the details and provide notes.

Details	Business Case	Customer Details	Financials	Assessment Data	Notes
Impact	3 - Moderate		T-Shirt size S - Small		
Risk	5		Score 0		
Value	5		Assessment Required <input checked="" type="checkbox"/>		

Details	Business Case	Customer Details	Financials	Assessment Data	Notes
Work notes	Working on demand module creation..				

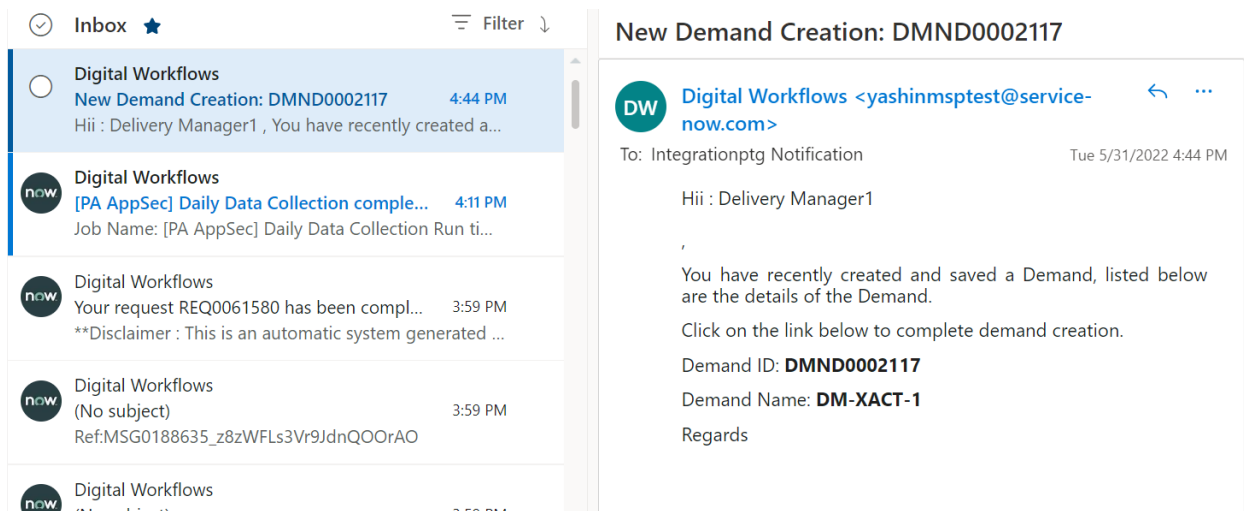
9. After filling the required fields, click on **Save** to create the demand record in the system.



The screenshot shows the YASH Technologies Demand Manager interface. On the left is a sidebar with a filter navigator and a list of options including Home, Project - Create New, Resource - All, Time Sheets - Time Sheet Portal, Time Sheets - Delegate, Time Sheets - All, Demand - My Demands, Demand - Create New, and Demand - All. The main area displays a 'Demand New record' form. The form includes fields for Name (DM-XACT-1), Category (Strategic), Type (Project), Currency Type (USD), Demand Number (DMND0002125), Start date (2022-03-01), End date (2022-12-30), Demand Status (Submission Pending From DM), and State (Draft). Below these is a 'Demand Description' field. At the bottom, there is a 'Financials' tab with fields for Total Demand Value (\$0.00), Total Planned Resource Cost (\$0.00), and Other Planned Cost (\$ 0.00). The 'Submit' and 'Save' buttons are highlighted with a red box.

10. Click on **Submit Demand** (This demand will be with demand manager) for demand to get qualified.

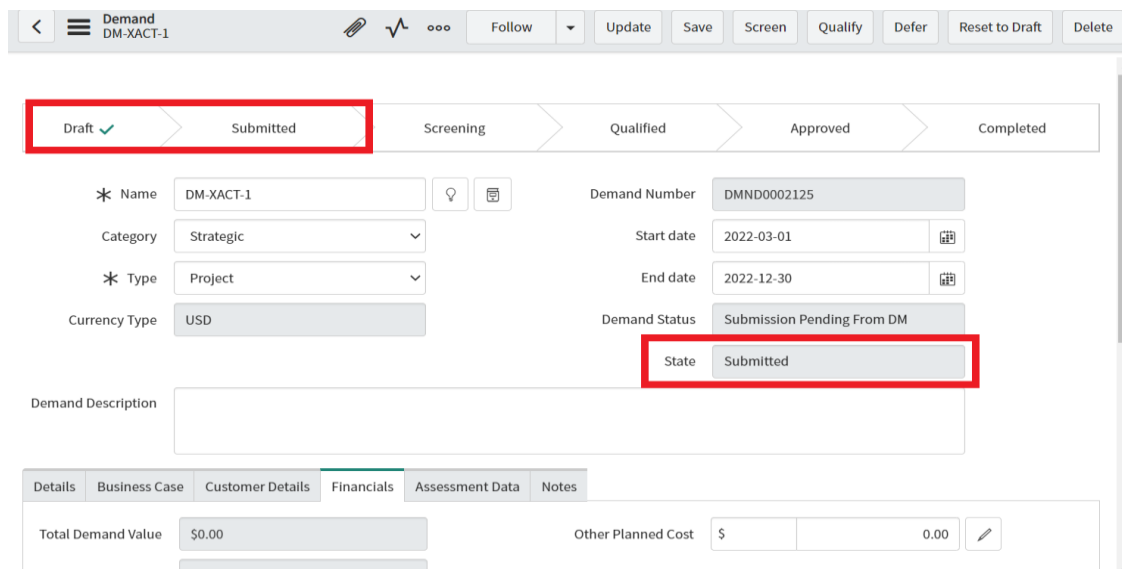
11. Once the demand is submitted, user receives an email notification.



The screenshot shows an email inbox on the left with several messages from 'Digital Workflows'. The selected email is titled 'New Demand Creation: DMND0002117'. The email body contains the following information:

- To:** Integrationptg Notification
- Date:** Tue 5/31/2022 4:44 PM
- Recipient:** Hii : Delivery Manager1
- Content:**
 - You have recently created and saved a Demand, listed below are the details of the Demand.
 - Click on the link below to complete demand creation.
 - Demand ID:** **DMND0002117**
 - Demand Name:** **DM-XACT-1**
- Closing:** Regards

12. When creating a demand, the state will be in Draft. Once the demand is submitted, state moves to Submitted.



The screenshot shows the 'Demand DM-XACT-1' form. At the top, there is a progress bar with stages: Draft (checked), Submitted (highlighted with a red box), Screening, Qualified, Approved, and Completed. Below the progress bar, the form fields are as follows:

- Name:** DM-XACT-1
- Category:** Strategic
- Type:** Project
- Currency Type:** USD
- Demand Number:** DMND0002125
- Start date:** 2022-03-01
- End date:** 2022-12-30
- Demand Status:** Submission Pending From DM
- State:** Submitted (highlighted with a red box)

Below the form fields, there is a 'Demand Description' text area. At the bottom, there is a table with tabs: Details, Business Case, Customer Details, Financials, Assessment Data, and Notes. The 'Financials' tab is active, showing:

Total Demand Value	\$0.00	Other Planned Cost	\$ 0.00
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How to Create A Resource Plan

The demand manager can create a resource plan from the resource management application for tasks such as demand, project, project task, incident, problem or change. This can also be edited and adjusted until ready to submit for approval.

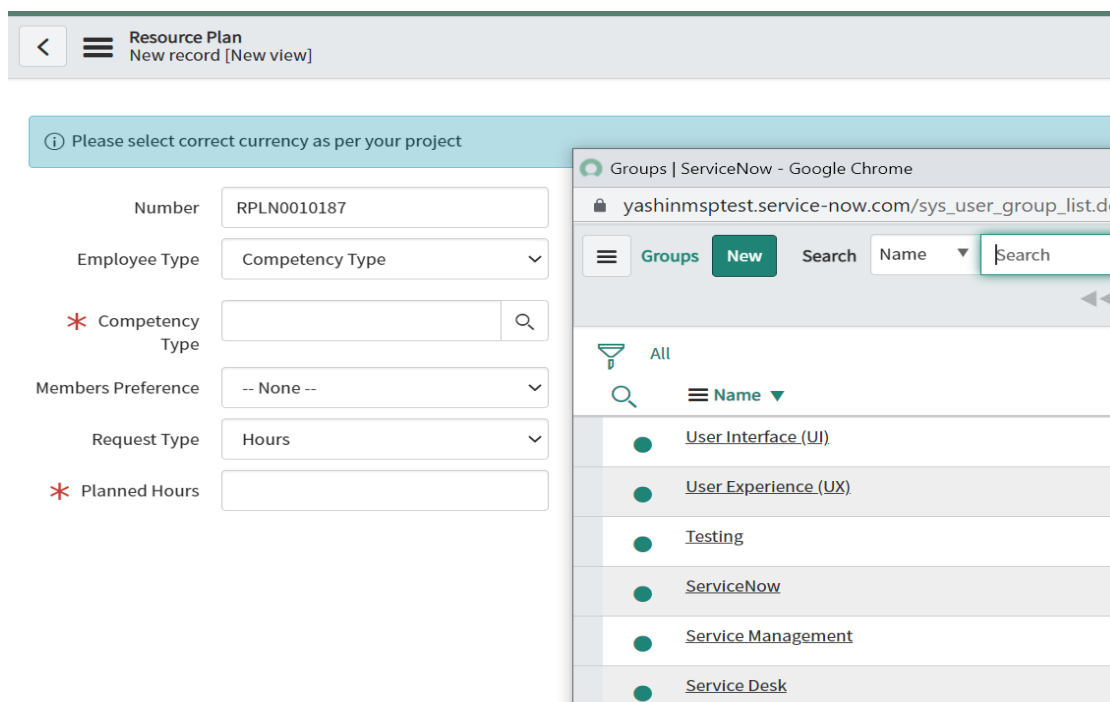
1. Click on **New** button under **Resource Plan** tab on the bottom of the screen.

The screenshot shows the YASH Technologies Demand Manager interface. The top navigation bar includes the YASH logo, user name 'Delivery Manager1', and various action buttons like 'Follow', 'Update', 'Save', 'Submit demand', and 'Delete'. The main content area displays a form for creating a demand, with fields for 'Demand manager' (Delivery Manager1), 'Project Manager', 'GEOS' (INDIA), and user selection (BG User1, BU User1). Below the form are buttons for 'Update', 'Save', 'Submit demand' (highlighted with a red circle), and 'Delete'. A tabbed interface at the bottom shows 'Resource Plans' (highlighted with a red box), 'Stakeholders', 'Requirements', 'Risks', 'Issues', 'Decisions', 'Actions', and 'Approvers'. Under the 'Resource Plans' tab, there are buttons for 'Manage' and 'New' (highlighted with a red circle), along with a search bar. The table below shows 'No records to display'.

2. Fill in the details in the Resource Plan form.

The screenshot shows the YASH Technologies Resource Plan form. The top navigation bar includes the YASH logo, user name 'Delivery Manager1', and a 'Submit' button. The main content area displays a form for creating a new resource plan. The form includes fields for 'Number' (RPLN0010187), 'Employee Type' (Competency Type), 'Competency Type' (with a red asterisk), 'Members Preference' (None), 'Request Type' (Hours), and 'Planned Hours' (with a red asterisk). On the right side, there are fields for 'Resource Plan Name', 'Parent' (DMND0002125), 'Start Date' (2022-03-01), 'End Date' (2022-12-30), 'Distribution Mode' (Weekly), 'Distribution Type' (Even), 'Request State' (Planning), 'Billable Type' (Billing), 'Employee Median Pay Rate (Hrly)' (\$ 0.00), 'Employee Median Bill Rate (Hrly)' (\$ 0.00), and 'Employee Overtime Rate (Hrly)' (\$ 0.00). A message at the top of the form states: 'Please select correct currency as per your project'.

3. For the Competency Type, click on the navigator and a list will appear, select the skill type from the list as required.



The screenshot shows the 'Resource Plan' form in ServiceNow. The form includes fields for 'Number' (RPLN0010187), 'Employee Type' (Competency Type), 'Competency Type' (with a search icon), 'Members Preference' (-- None --), 'Request Type' (Hours), and 'Planned Hours'. A message at the top of the form states: 'Please select correct currency as per your project'. To the right, the 'Groups' navigator is open, showing a list of groups: 'User Interface (UI)', 'User Experience (UX)', 'Testing', 'ServiceNow', 'Service Management', and 'Service Desk'. The 'Groups' tab is selected, and the 'New' button is visible.

4. Select Members Preference from the drop-down list:
 - a. **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.
 - b. **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 all members of the selected group or role proportionally depending on their capacity.
 - c. **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.

Type

Members Preference -- None --

Request Type

* Planned Hours

-- None --

All members

Specific members

Any member

5. Select Resource Type from the dropdown.

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

* FTE

FTE

Hours

Man Days

FTE

6. Fill in the details like Resource Plan Name, Start Date, End Date, Distribution type (Even, Front Lane).

- **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.

7. Select the Billable type from the dropdown.

* Billable Type

Billing

Billing

Non-Billing

Overhead

OverTime

* Employee Median Pay Rate(Hrly) \$

* Employee Median Bill Rate

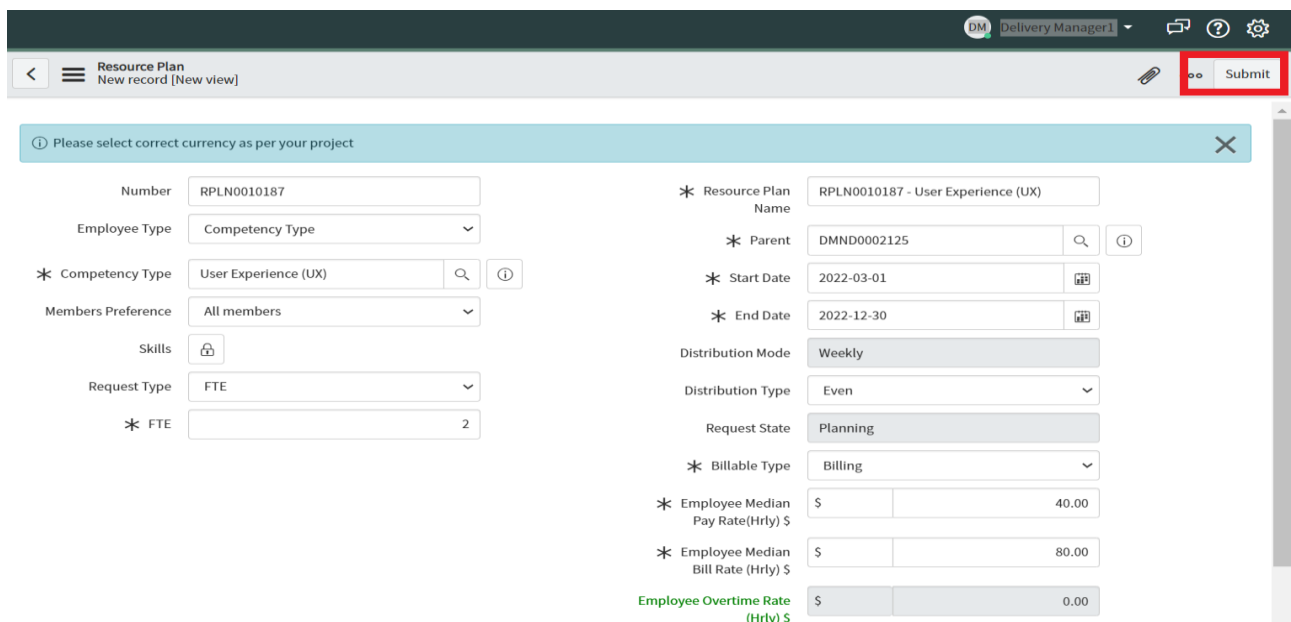
\$

0.00

8. Enter the amount in Employee Median Pay rate and Employee Median Bill Rate.

* Billable Type	Billing	▼
* Employee Median Pay Rate(Hrly) \$	\$	40.00
* Employee Median Bill Rate (Hrly) \$	\$	80.00
Employee Overtime Rate (Hrly) \$	\$	0.00

9. After filling the mandatory fields, click on **Submit** button.



DM Delivery Manager1

< Resource Plan New record [New view]

Submit

Please select correct currency as per your project

Number RPLN0010187

Employee Type Competency Type

* Competency Type User Experience (UX)

Members Preference All members

Skills

Request Type FTE

* FTE 2

* Resource Plan Name RPLN0010187 - User Experience (UX)

* Parent DMND0002125

* Start Date 2022-03-01

* End Date 2022-12-30

Distribution Mode Weekly

Distribution Type Even

Request State Planning

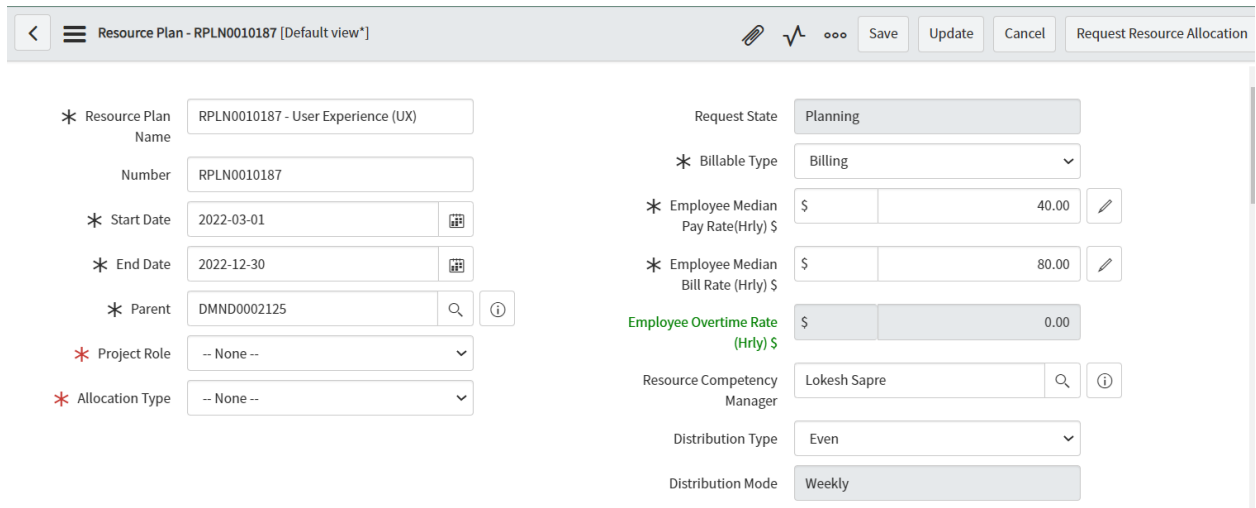
* Billable Type Billing

* Employee Median Pay Rate(Hrly) \$ 40.00

* Employee Median Bill Rate (Hrly) \$ 80.00

Employee Overtime Rate (Hrly) \$ 0.00

10. Once the Resource plan is submitted, some more fields are populated which are mandatory to fill.



The screenshot shows a web application interface for a Resource Plan. The title bar indicates 'Resource Plan - RPLN0010187 [Default view*]'. The form is divided into two main sections. The left section contains fields for:

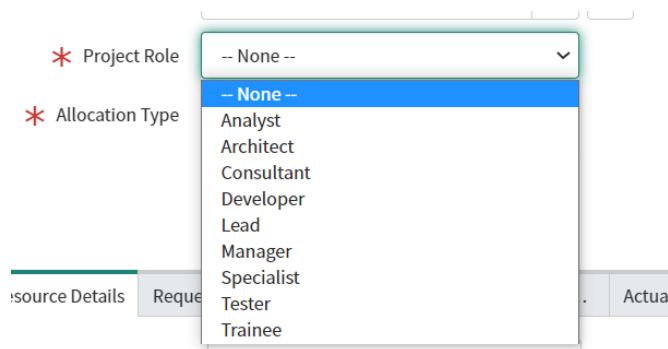
- Resource Plan Name:** RPLN0010187 - User Experience (UX)
- Number:** RPLN0010187
- Start Date:** 2022-03-01
- End Date:** 2022-12-30
- Parent:** DMND0002125
- Project Role:** -- None --
- Allocation Type:** -- None --

 The right section contains fields for:

- Request State:** Planning
- Billable Type:** Billing
- Employee Median Pay Rate (Hrly):** \$ 40.00
- Employee Median Bill Rate (Hrly):** \$ 80.00
- Employee Overtime Rate (Hrly):** \$ 0.00
- Resource Competency Manager:** Lokesh Sapre
- Distribution Type:** Even
- Distribution Mode:** Weekly

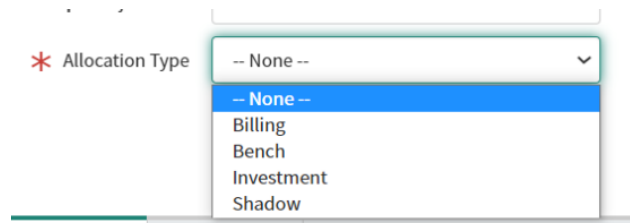
 At the top right, there are buttons for 'Save', 'Update', 'Cancel', and 'Request Resource Allocation'.

11. Select the Project Role from the dropdown.



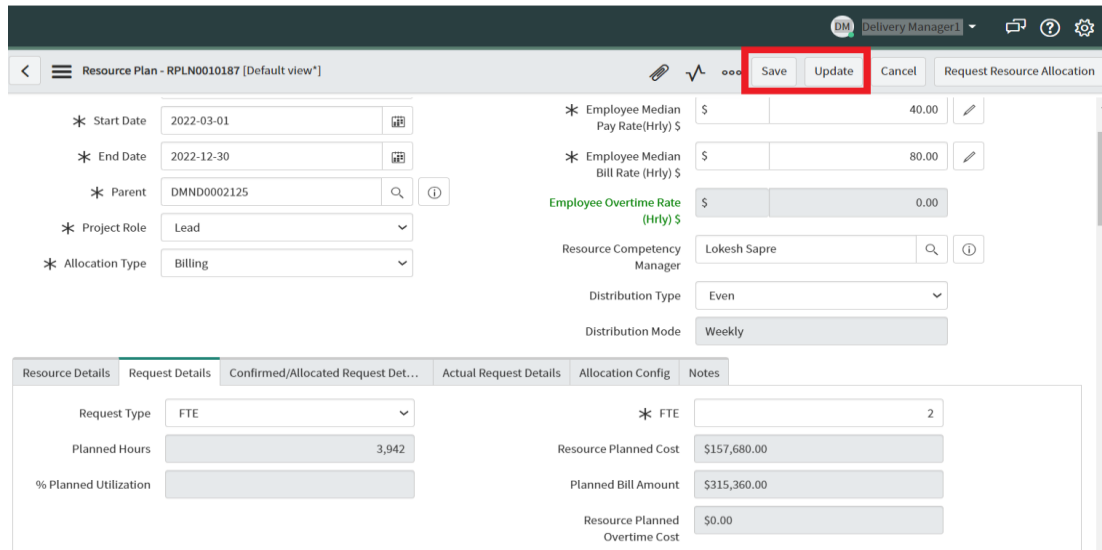
This screenshot shows a close-up of the 'Project Role' dropdown menu. The menu is open, displaying a list of roles: Analyst, Architect, Consultant, Developer, Lead, Manager, Specialist, Tester, and Trainee. The 'Project Role' label is visible to the left of the dropdown.

12. Select the Allocation type from the dropdown.



This screenshot shows a close-up of the 'Allocation Type' dropdown menu. The menu is open, displaying a list of allocation types: Billing, Bench, Investment, and Shadow. The 'Allocation Type' label is visible to the left of the dropdown.

13. After values are filled, click on Save/Update.



Resource Plan - RPLN0010187 [Default view]

Buttons: Save, Update, Cancel, Request Resource Allocation

Fields:

- * Start Date: 2022-03-01
- * End Date: 2022-12-30
- * Parent: DMND0002125
- * Project Role: Lead
- * Allocation Type: Billing
- * Employee Median Pay Rate(Hrly) \$: 40.00
- * Employee Median Bill Rate (Hrly) \$: 80.00
- Employee Overtime Rate (Hrly) \$: 0.00
- Resource Competency Manager: Lokesh Sapre
- Distribution Type: Even
- Distribution Mode: Weekly

Tabs: Resource Details, Request Details, Confirmed/Allocated Request Det..., Actual Request Details, Allocation Config, Notes

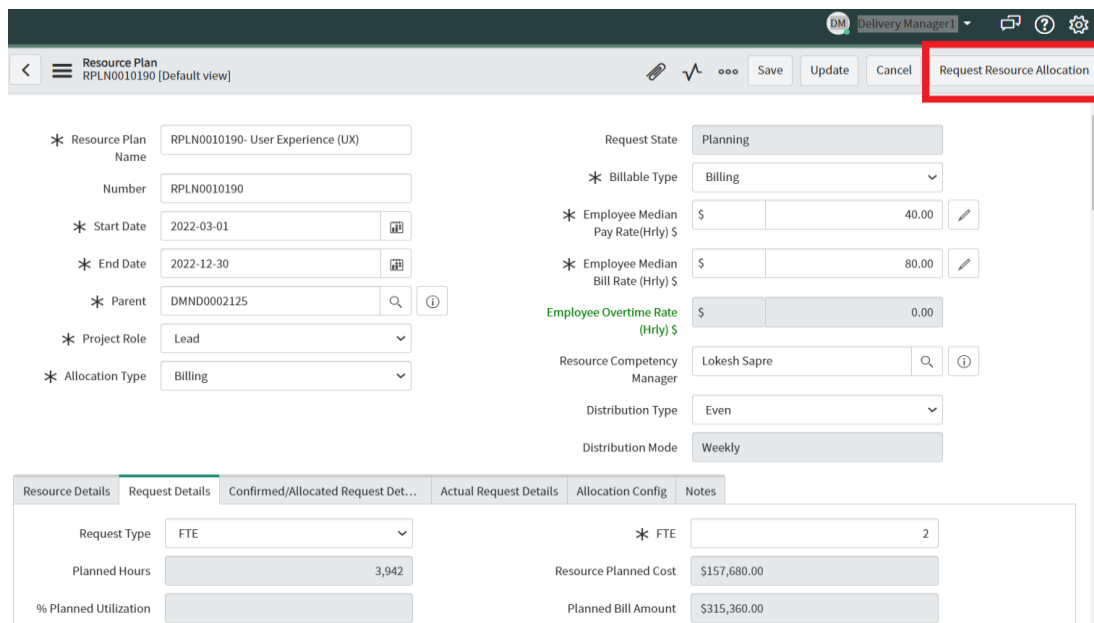
Request Details:

- Request Type: FTE
- Planned Hours: 3,942
- % Planned Utilization:

Allocation Config:

- * FTE: 2
- Resource Planned Cost: \$157,680.00
- Planned Bill Amount: \$315,360.00
- Resource Planned Overtime Cost: \$0.00

14. To request for resource, click on Request Resource Allocation.



Resource Plan - RPLN0010190 [Default view]

Buttons: Save, Update, Cancel, Request Resource Allocation

Fields:

- * Resource Plan Name: RPLN0010190- User Experience (UX)
- Number: RPLN0010190
- * Start Date: 2022-03-01
- * End Date: 2022-12-30
- * Parent: DMND0002125
- * Project Role: Lead
- * Allocation Type: Billing
- Request State: Planning
- * Billable Type: Billing
- * Employee Median Pay Rate(Hrly) \$: 40.00
- * Employee Median Bill Rate (Hrly) \$: 80.00
- Employee Overtime Rate (Hrly) \$: 0.00
- Resource Competency Manager: Lokesh Sapre
- Distribution Type: Even
- Distribution Mode: Weekly

Tabs: Resource Details, Request Details, Confirmed/Allocated Request Det..., Actual Request Details, Allocation Config, Notes

Request Details:

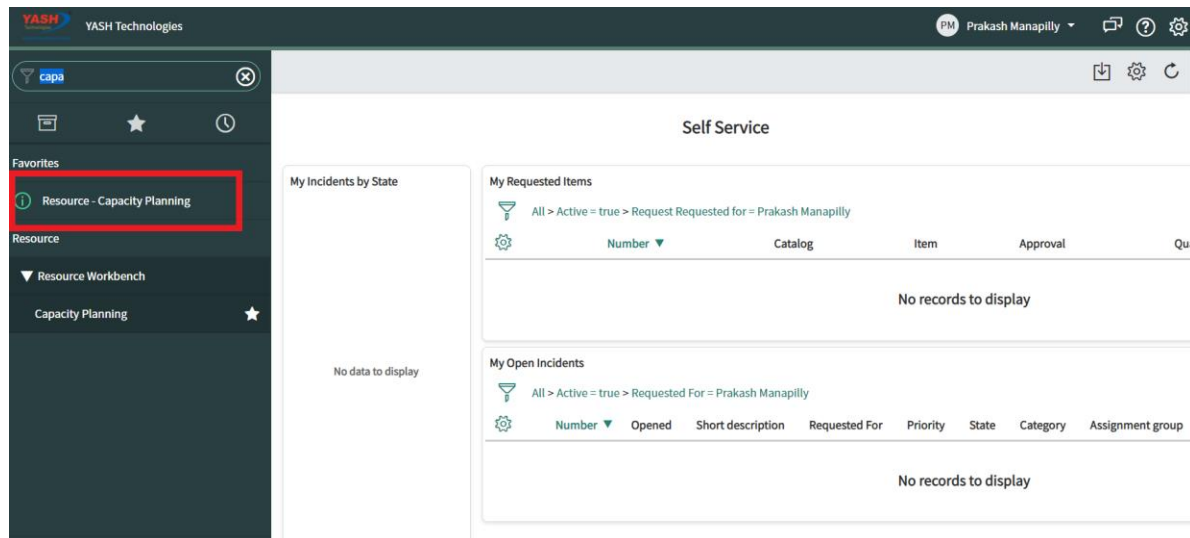
- Request Type: FTE
- Planned Hours: 3,942
- % Planned Utilization:

Allocation Config:

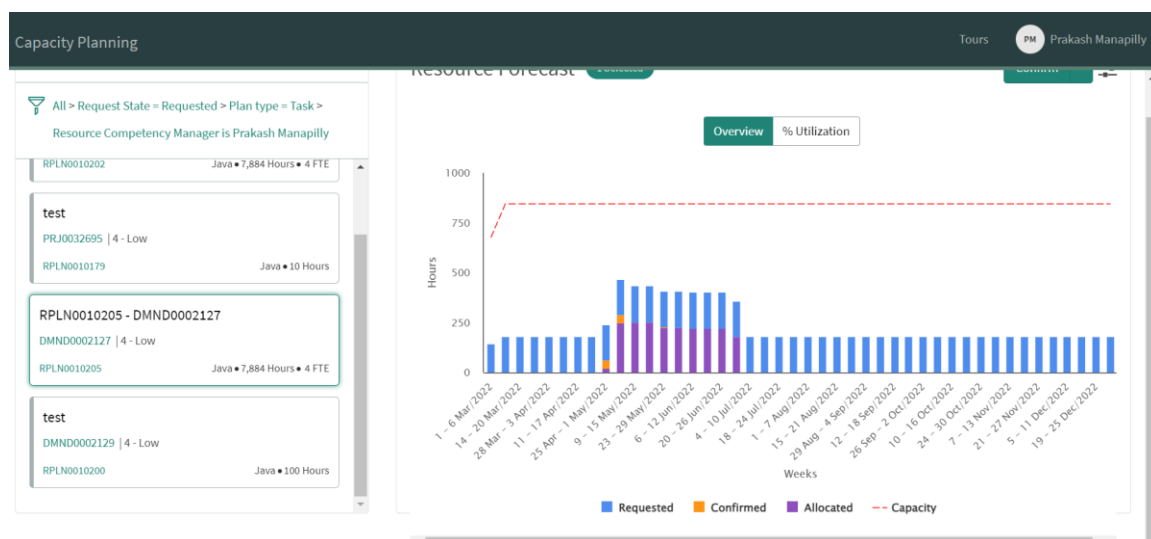
- * FTE: 2
- Resource Planned Cost: \$157,680.00
- Planned Bill Amount: \$315,360.00

How to View Capacity Planning: Competency Manager

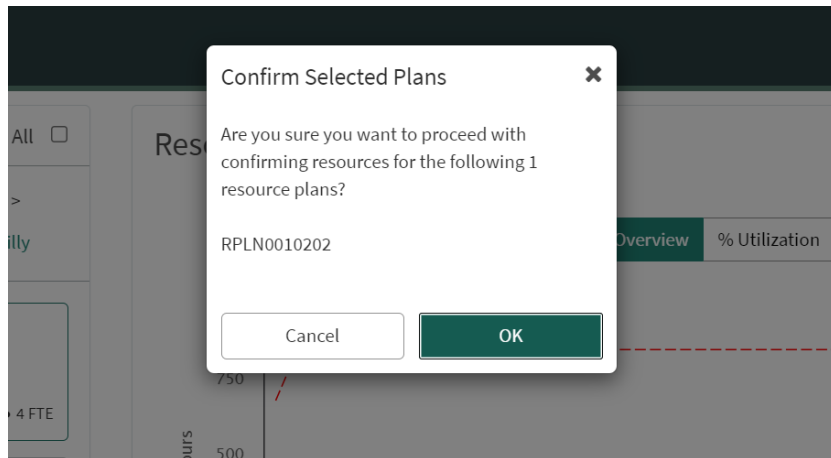
- Once the resource plan is requested for resource allocation > Competency Manager receives an email notification. Click on the home page and using the filter navigator, search for Capacity Planning



- Click on **Capacity Planning** and the landing page will reload to the Resource Forecast page. Click on **confirm** based on availability.



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



18. Once requested, the Resource plan details are locked and it will be sent to respective competency manager for Soft or Hard blocking of resources.

Delivery Manager1

Resource Plan
RPLN0010190

Save Update Cancel Request Change

Resource Plan Name: RPLN0010190- User Experience (UX)
 Number: RPLN0010190
 * Start Date: 2022-03-01
 * End Date: 2022-12-30
 * Parent: DMND0002125
 Project Role: Lead
 Allocation Type: Billing

Request State: Requested
 Billable Type: Billing
 Employee Median Pay Rate(Hrly) \$: \$40.00
 Employee Median Bill Rate (Hrly) \$: \$80.00
 Employee Overtime Rate (Hrly) \$: \$0.00
 Resource Competency Manager: Lokesh Sapre
 Distribution Type: Even
 Distribution Mode: Weekly

Resource Details Request Details Confirmed/Allocated Request Det... Actual Request Details Allocation Config Notes

Request Type: FTE * FTE: 2
 Planned Hours: 3,942
 Resource Planned Cost: \$157,680.00
 % Planned Utilization: Planned Bill Amount: \$315,360.00

19. Click on Update button and redirected to Demand list view.

DM Delivery Manager1

Resource Plan RPLN0010190

Save Update Cancel Request Change

Resource Plan Name: RPLN0010190- User Experience (UX)

Number: RPLN0010190

* Start Date: 2022-03-01

* End Date: 2022-12-30

* Parent: DMND0002125

Project Role: Lead

Allocation Type: Billing

Request State: Requested

Billable Type: Billing

Employee Median Pay Rate(Hrly) \$: \$40.00

Employee Median Bill Rate (Hrly) \$: \$80.00

Employee Overtime Rate (Hrly) \$: \$0.00

Resource Competency Manager: Lokesh Sapre

Distribution Type: Even

Distribution Mode: Weekly

Resource Details Request Details Confirmed/Allocated Request Det... Actual Request Details Allocation Config Notes

Employee Type Competency Type

* Competency Type: User Experience (UX)

DM Delivery Manager1

Demands New

1 to 1 of 1

	Demand Number	Name	Demand manager	Approval	Start date	End date	BG	BU	BGH/SSGH	BUH/SSU
	DMND0002125	DM-XACT-1	Delivery Manager1	Not Yet Requested	2022-03-01	2022-12-30	BG2	BG2-BU9	BG User1	BU User1

Actions on selected rows...

Related Links

[Demand Workbench](#)

[Timeline Visualization](#)

20. Click on the Existing Demand number and will be redirected to the Demand Page. Click on Screen and Qualify button to request for approval from Business Unit and Business Group.

The screenshot shows the 'Demand Manager' interface for a demand named 'DM-XACT-1'. The demand is in the 'Submitted' state. The 'Screen' and 'Qualify' buttons are highlighted with a red box. The demand details include:

- Name: DM-XACT-1
- Category: Strategic
- Type: Project
- Currency Type: USD
- Demand Number: DMND0002125
- Start date: 2022-03-01
- End date: 2022-12-30
- Demand Status: Submission Pending From DM
- State: Submitted

The 'Details' tab is selected, showing the following information:

- Service Line: AMS
- Sub-Service Type: AMS - Advisory and Consulting
- Submitted by: Delivery Manager1
- BG: BG2
- BU: BG2-BU9
- BGH/SSGH: BG User1

21. Once clicked on Screen, the state is moved to screening.

The screenshot shows the 'Demand Manager' interface for the same demand 'DM-XACT-1'. The demand is now in the 'Screening' state. The 'Screening' tab is highlighted with a red box. The 'State' field is also highlighted with a red box and shows 'Screening'. The demand details remain the same as in the previous screenshot.

22. Once clicked on Qualify button, the state is moved to Qualified and the Request Approval button will be visible. Click on **Request Approval** button.

The screenshot shows the 'Demand Manager' interface for a demand named 'DM-XACT-1'. The top navigation bar includes buttons for 'Follow', 'Update', 'Save', 'Request Approval' (highlighted with a red box), 'Defer', 'Reset to Draft', and 'Delete'. Below this, a progress bar shows the state 'Qualified' (highlighted with a red box) as the current step, with previous steps 'Draft', 'Submitted', and 'Screening' marked as complete. The form fields include: Name (DM-XACT-1), Category (Strategic), Type (Project), Currency Type (USD), Demand Number (DMND0002125), Start date (2022-03-01), End date (2022-12-30), Demand Status (Submission Pending From DM), and State (Qualified, highlighted with a red box). The Demand Description field is empty.

23. Once the Demand is Requested for Approval, In the Approvers tab, the list of approver names is appeared and state of the demand as Requested.

The screenshot shows the 'Demand Manager' interface for a demand named 'DM-XACT-1'. The top navigation bar includes buttons for 'Follow', 'Update', 'Save', 'Request Approval', 'Defer', 'Reset to Draft', and 'Delete'. Below this, a progress bar shows the state 'Approved' (highlighted with a red box) as the current step, with previous steps 'Draft', 'Submitted', 'Screening', and 'Qualified' marked as complete. The form fields include: Name (DM-XACT-1), Category (Strategic), Type (Project), Currency Type (USD), Demand Number (DMND0002125), Start date (2022-03-01), End date (2022-12-30), Demand Status (Approval Pending From BUH, highlighted with a red box), and State (Qualified). Below the form, the 'Approvers' tab is selected, showing a table of approvers. The table has columns for State, Approver, Approving, Comments, Created, and Approval Column. The first row shows the state 'Requested', the approver 'BU User1', the demand 'DM-XACT-1', and the creation time '2022-05-31 18:37:10'. The table is paginated to show 1 of 1 rows.

State	Approver	Approving	Comments	Created	Approval Column
Requested	BU User1	Demand: DM-XACT-1		2022-05-31 18:37:10	approval

BUH & BGH Approval

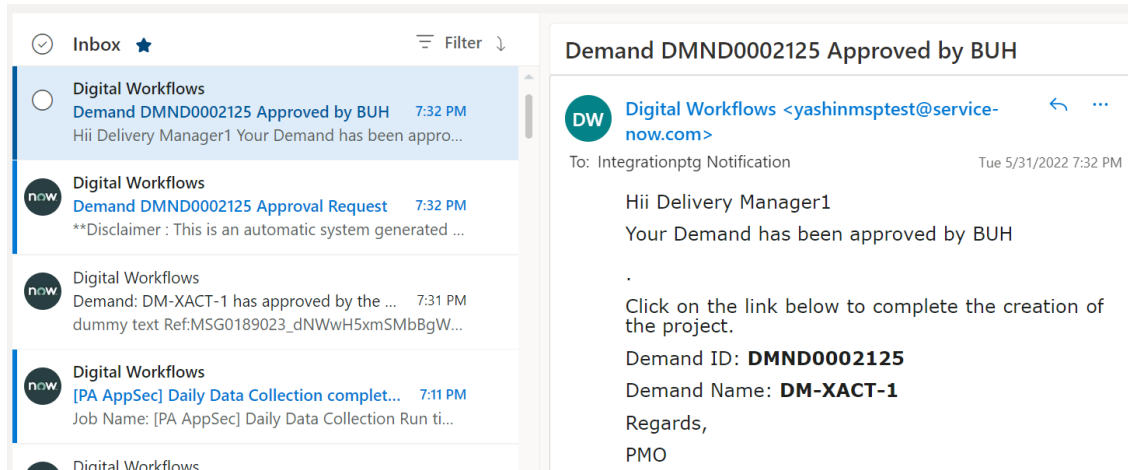
24. Once the Demand is Requested for approval, BUH receives an Email notification.

The screenshot shows an email inbox on the left with several messages from 'Digital Workflows'. The selected email is titled 'Demand DMND0002125 Approval Request' and is dated 6:38 PM. The email body contains a disclaimer, a short description 'DM-XACT-1', a priority of '4 - Low', and a request for approval. It includes two links: 'Click here to approve DMND0002125' and 'Click here to reject DMND0002125'.

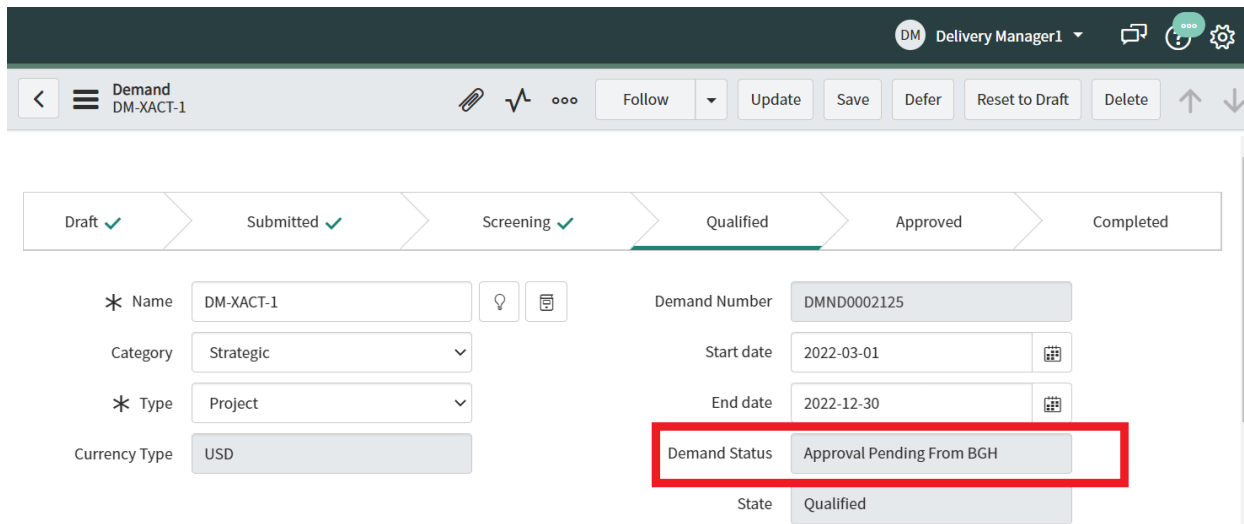
25. Click on the link provided in the Email, redirected to ServiceNow portal and from the drop down select **Approved**, then click on **Approve** from the ribbon.

The screenshot shows the ServiceNow portal interface. On the left is a sidebar with navigation options like 'Self-Service', 'Raise XACT ITSD Ticket', 'TimeSheet User Manual', 'My Pending Approvals', 'Homepage', 'Dashboards', 'My Document Tasks', 'Employee Center', 'Visual Task Boards', and 'My Profile'. The main area displays the 'Approval' process for 'Demand: DM-XACT-1'. The 'Approver' is 'BU User1' and the 'State' is 'Requested'. A dropdown menu is open, showing options: 'Not Yet Requested', 'Requested' (highlighted), 'Approved', 'Rejected', 'Cancelled', 'No Longer Required', 'More Information Required', and 'Duplicate'. At the bottom, there are buttons for 'Update', 'Approve', 'Reject', and 'Request More Information'.

26. Once the Demand is approved by BUH, Demand manager receives an email notification as below:



27. When the BUH approves the Demand, it will automatically redirect to BGH for approval and demand status changes as below:



Approvers

Search

Created

Search

1 to 2 of 2

Approval for = DMND0002125

		State	Approver	Approving	Comments	Created	Approval Column
<div></div>	<div></div>	<div></div> Requested	<div></div> BG User1	<div></div> Demand: DM-XACT-1		<div></div> 2022-05-31 19:31:48	<div></div> approval
<div></div>	<div></div>	<div></div> Approved	<div></div> BU User1	<div></div> Demand: DM-XACT-1	<div></div> 2022-05-31 19:31:46 - BU User1 (Comment	<div></div> 2022-05-31 18:37:10	<div></div> approval

Actions on selected rows...

1 to 2 of 2

28. Once the Demand is approved by BUH, BGH receives an email notification.

Inbox

- Digital Workflows
Demand DMND0002125 Approved by BUH
Hii Delivery Manager1 Your Demand has been approved by BUH . Cli... 7:32 PM
- Digital Workflows
Demand DMND0002125 Approval Request
**Disclaimer : This is an automatic system generated e-mail, please d... 7:32 PM
- Digital Workflows
Demand: DM-XACT-1 has approved by the BUH
dummy text Ref:MSG0189023_dNWwH5xmSMbBgW3PIREn 7:31 PM
- Digital Workflows
[PA AppSec] Daily Data Collection completed with warning 7:11 PM
Job Name: [PA AppSec] Daily Data Collection Run time: 7 Seconds Ins...
- Digital Workflows
Project PRJ0032941 Approval Request 6:51 PM
**Disclaimer : This is an automatic system generated e-mail, please d...
- Digital Workflows
Project Field change notification 6:51 PM
Hello, On 2022-05-31 18:49:51 IST a change has been made to Pri Pr...
- Digital Workflows
Project Field change notification 6:51 PM
Hello, On 2022-05-31 18:49:51 IST a change has been made to Pri Pr...
- Digital Workflows
Project Field change notification 6:51 PM

Demand DMND0002125 Approval Request

DW Digital Workflows <yashinmsptest@service-now.com>
To: Integrationptg Notification
Tue 5/31/2022 7:32 PM

****Disclaimer : This is an automatic system generated e-mail, please do not reply to this notification.****

Short Description: DM-XACT-1
Priority: 4 - Low

Requested for:
Description:

Comments:

[Click here to approve DMND0002125](#)

[Click here to reject DMND0002125](#)

Approval Activity:
BU User1 - Approved

[Click here to view Approval Request: LINK](#)
[Click here to view Demand: LINK](#)

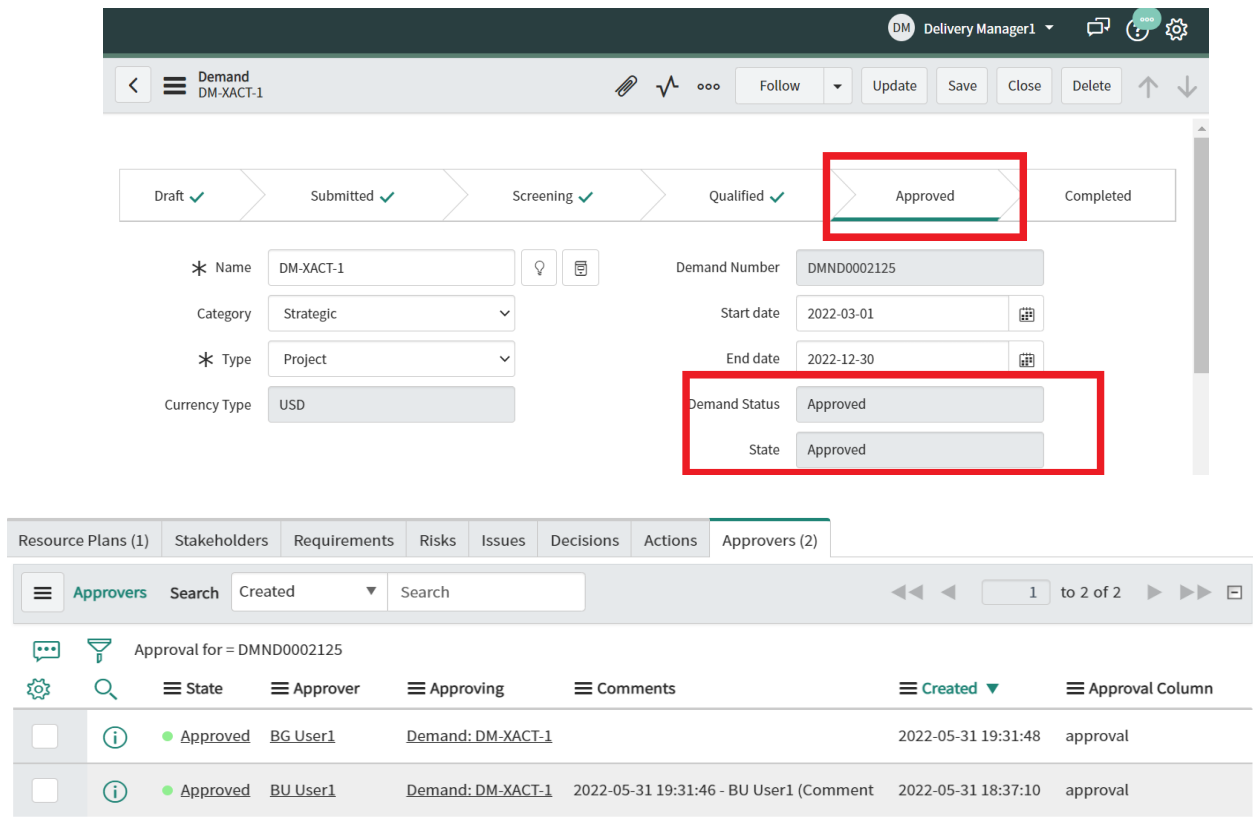
29. Click on the link provided in the email and redirected to ServiceNow Portal and from the drop down select approved, then click on Approve from the ribbon.

The screenshot shows the ServiceNow portal interface for an approval process. The top ribbon contains buttons for 'Update', 'Approve', 'Reject', and 'Request More Information'. The 'Approve' button is highlighted with a red box. The main form area shows the 'Approval' form for Demand DM-XACT-1. The 'State' dropdown menu is open, showing options: Requested, Not Yet Requested, Requested, Approved (highlighted), Rejected, Cancelled, No Longer Required, More Information Required, and Duplicate. The 'Approve' button is highlighted in the top ribbon.

30. Once the Demand is approved by BGH, Demand manager receives an email notification as below:

The screenshot shows an email notification from Digital Workflows. The subject is "Demand DMND0002125 Approved by BGH". The body text says: "Hii Delivery Manager1, Your demand has been approved by BGH. Click on the link below to complete the creation of the project. Demand ID: **DMND0002125** Demand Name: **DM-XACT-1** Regards, PMO".

31. Once the Approval process is done, Demand manager can view the Demand and State is moved to Approved.

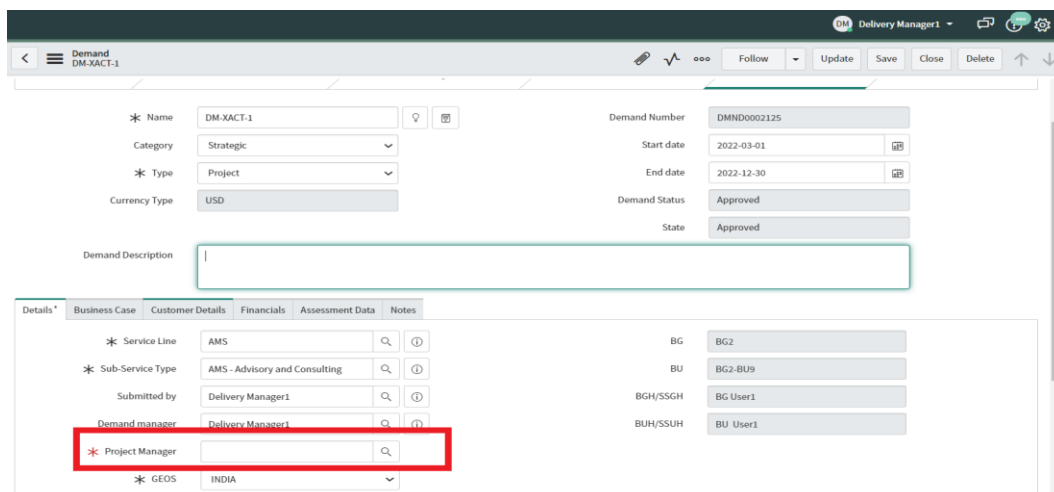


The screenshot shows the 'Demand Manager' interface for a demand named 'DM-XACT-1'. The demand is in the 'Approved' state, which is highlighted with a red box. The 'Demand Status' and 'State' are also set to 'Approved', also highlighted with a red box. The demand number is 'DMND0002125', and the start and end dates are '2022-03-01' and '2022-12-30' respectively. The category is 'Strategic' and the type is 'Project'. The currency type is 'USD'.

Below the demand details, there is a tab for 'Approvers (2)'. The table shows two approvers:

State	Approver	Approving	Comments	Created	Approval Column
Approved	BG User1	Demand: DM-XACT-1		2022-05-31 19:31:48	approval
Approved	BU User1	Demand: DM-XACT-1	2022-05-31 19:31:46 - BU User1 (Comment	2022-05-31 18:37:10	approval

32. Demand Manager can select the Project manager name from the look-up list and click on **Save**.



The screenshot shows the 'Demand Manager' interface for a demand named 'DM-XACT-1'. The demand is in the 'Approved' state. The 'Demand Description' field is empty. Below the demand details, there is a tab for 'Details'. The 'Project Manager' field is highlighted with a red box, and it shows a look-up list with the name 'Delivery Manager1' selected.

The 'Details' tab shows the following information:

- Service Line: AMS
- Sub-Service Type: AMS - Advisory and Consulting
- Submitted by: Delivery Manager1
- Demand manager: Delivery Manager1
- Project Manager: Delivery Manager1
- GEOS: INDIA

On the right side, there is a list of users:

- BG: BG2
- BU: BG2-BU9
- BGH/SSGH: BG User1
- BUH/SSUH: BU User1

33. Project creation link will only appear once demand is approved. Click on Create Project to convert the Demand into Project.

* Project Manager

Project Manager1

Q

i

* GEOS

INDIA

▼

Update

Save

Close

Delete

Related Links

[Create Project](#)

34. Once the Demand is converted, a project ID is shown as ribbon on top of the screen.

DM Delivery Manager1

Follow

Update

Save

Delete

Demand Dm-xact-123

Project PRJ0032957 has been created.

Draft ✓

Submitted ✓

Screening ✓

Qualified ✓

Approved ✓

Completed

* Name

Dm-xact-123

Demand Number

DMND0002125

Category

Strategic

Start date

2022-03-01

Type

Project

End date

2022-12-30

Currency Type

USD

Demand Status

Approved

Project

Dm-xact-123

State

Completed

35. Once converted to Project, Project manager receives an email notification.

Inbox ★

Filter

Digital Workflows

[PA AppSec] Daily Data Collection comple... 8:11 PM

Job Name: [PA AppSec] Daily Data Collection Run ti...

Digital Workflows

New Project Creation: PRJ0032957 8:06 PM

Hi Project Manager1, You have recently created and ...

Digital Workflows

Demand DMND0002125 Approved by BGH 7:55 PM

Hii Delivery Manager1, Your demand has been appro...

Digital Workflows

Demand: DM-XACT-1 has approved by the ... 7:55 PM

dummy text Ref:MSG0189028_14iFwR6mJCPKJsU9B...

Digital Workflows

New Project Creation: PRJ0032957

Digital Workflows <yashinmsptest@service-now.com>

To: Integrationptg Notification

Tue 5/31/2022 8:06 PM

Hi Project Manager1,

You have recently created and saved a project, listed below are the details of the project.

Click on the link below to complete project creation.

Project ID: **PRJ0032957**

Project Name: **Dm-xact-123**

Project Link: [Click Here](#)

Regards,

PMO

Q & A

1. What is Demand module?

Ans: Demand module provides ample amount of time for resource planning when a new project is created.

2. Can a Project Manager/Business heads create a demand?

Ans: Only Delivery/Demand Manager has access to create a demand.

3. What if the created demand is not qualified?

Ans: It will be closed or cancelled.

4. Can a demand be submitted without creating a resource plan?

Ans: Without creating the resource plan demand cannot be submitted for approval process.

5. What is the probability of conversion of demand to project?

Ans:

6. What if the resource plan is created and resource allocation is pending?

Ans: When a demand is converted into project, resource allocation is done based on the availability of the resource.

7. If there is an existing project created, can we create a demand for that project?

Ans: If the project is already created then there is no requirement to create a demand to that.

8. What is Service Line and Sub-Service Line type?

Ans: Service-line is a portfolio that defines the category of a project which belongs to the line type.

- Sub-Service line is a program that defines the sub category of Service-line.

9. What is the approval process for Demand?

Ans: Demand needs approval from Business Unit head and Business Group head.

10. Dates provided in the demand are fixed?

Ans: Dates are assumption, depending upon the Project and SOW approval the time frame can be changed.