www.yash.com

User Manual

Demand Management

Powered By – Service Now

Created By – XACT Product Team

Document Control

Author	XACT Product Team
Company Name	YASH Technologies
Division Name	YASH Next
Document Name	Demand Management User Guide
Version Date	19/05/2022
Version Number	1
Effective Date	19/05/2022
Next Review Date	

Change Record

Modified Date	Author	Version	Description of change

Contents

XACT Demand Management ~ User Manual

Purpose:

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

Scope:

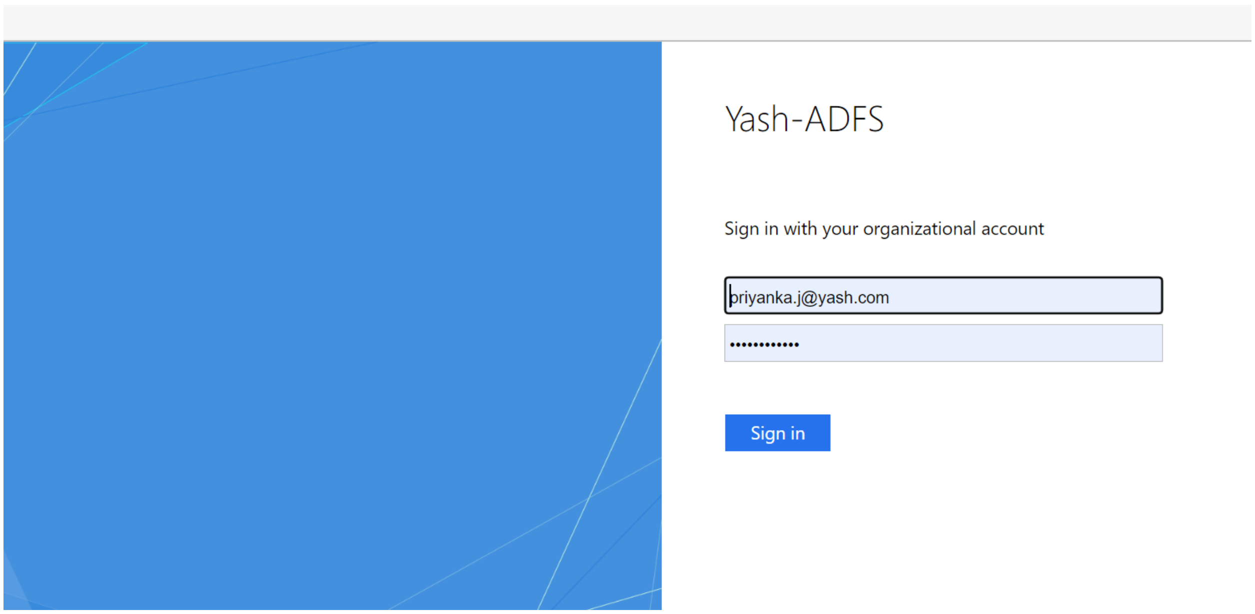
This document contains the steps to create the demand and update details of demand on service now.

Roles:

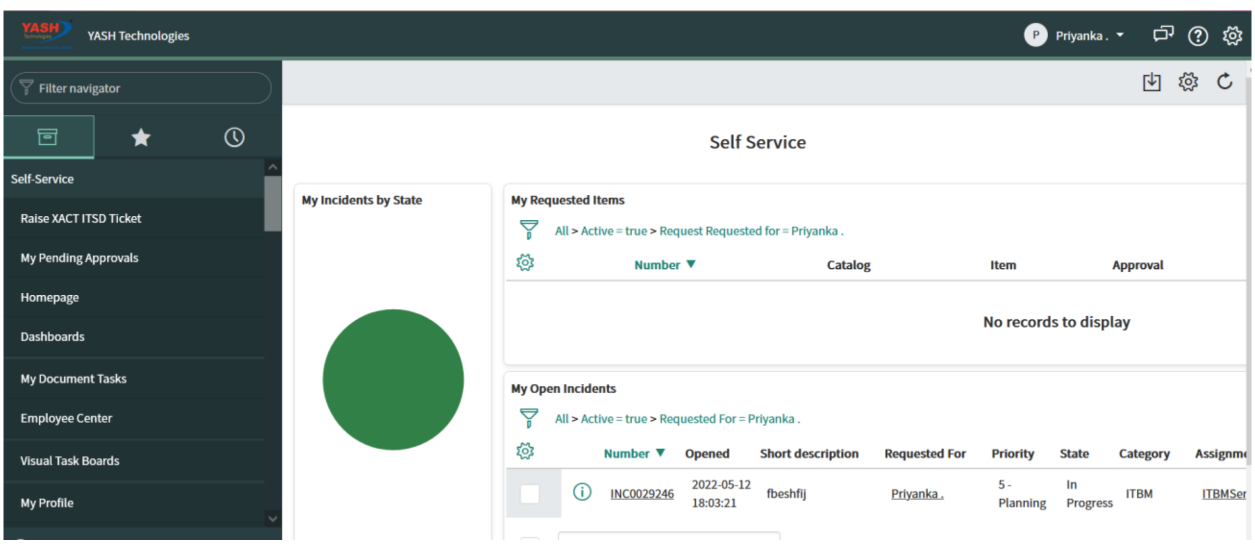
Delivery manager, Demand manager

Walkthrough on Service Now

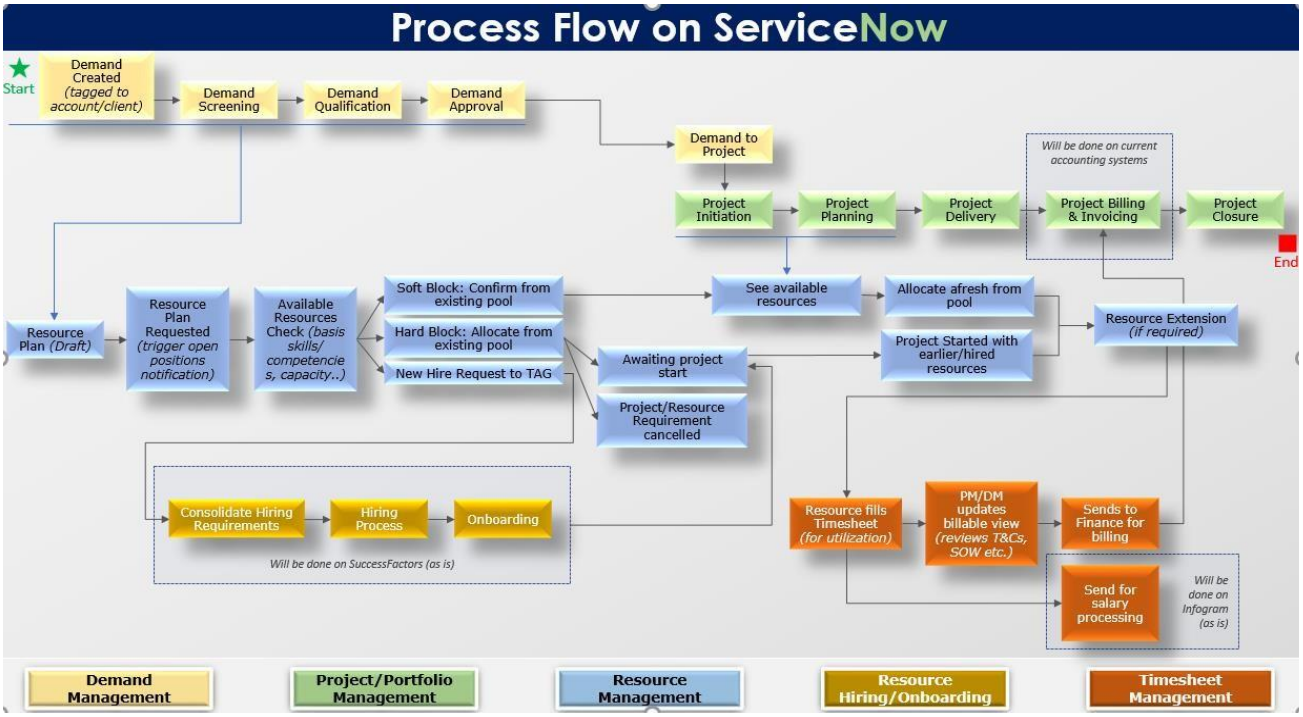
Prod link: https://yashinmsp.service-now.com/



Landing Page should show below screen as per your role.



ServiceNow Process Flow Overview:



Demand Management:

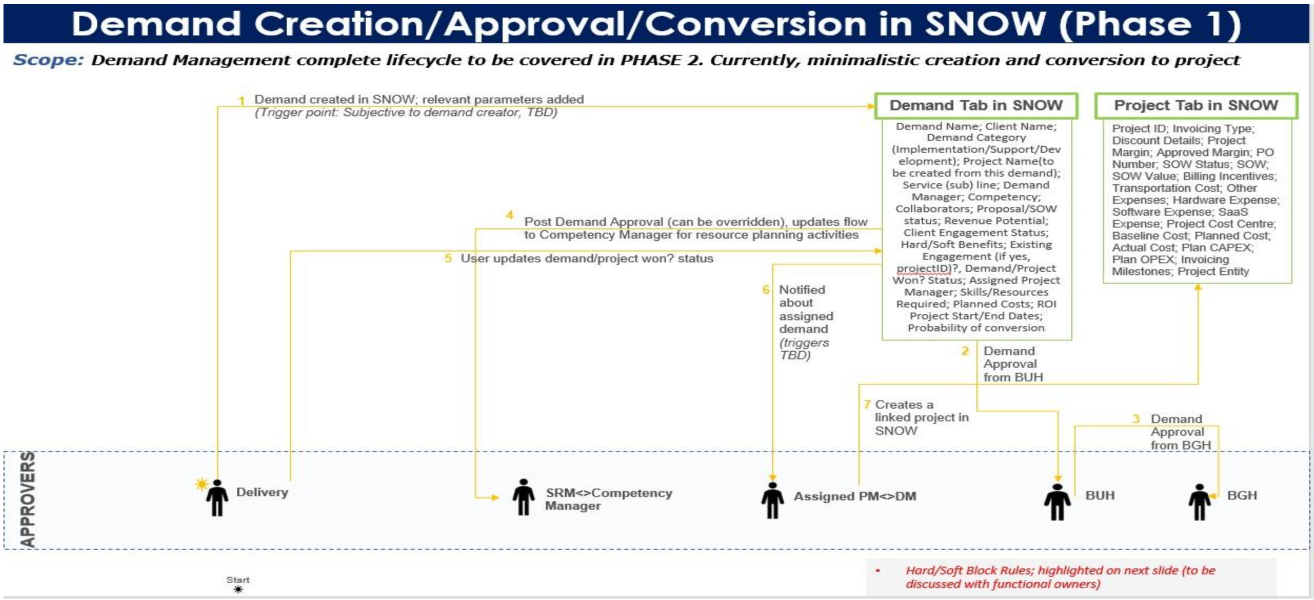
The Demand Management application consists of tools that help in capturing, centralizing and assessing strategic and operational demands. It also provides a single location for managing all demand information.

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

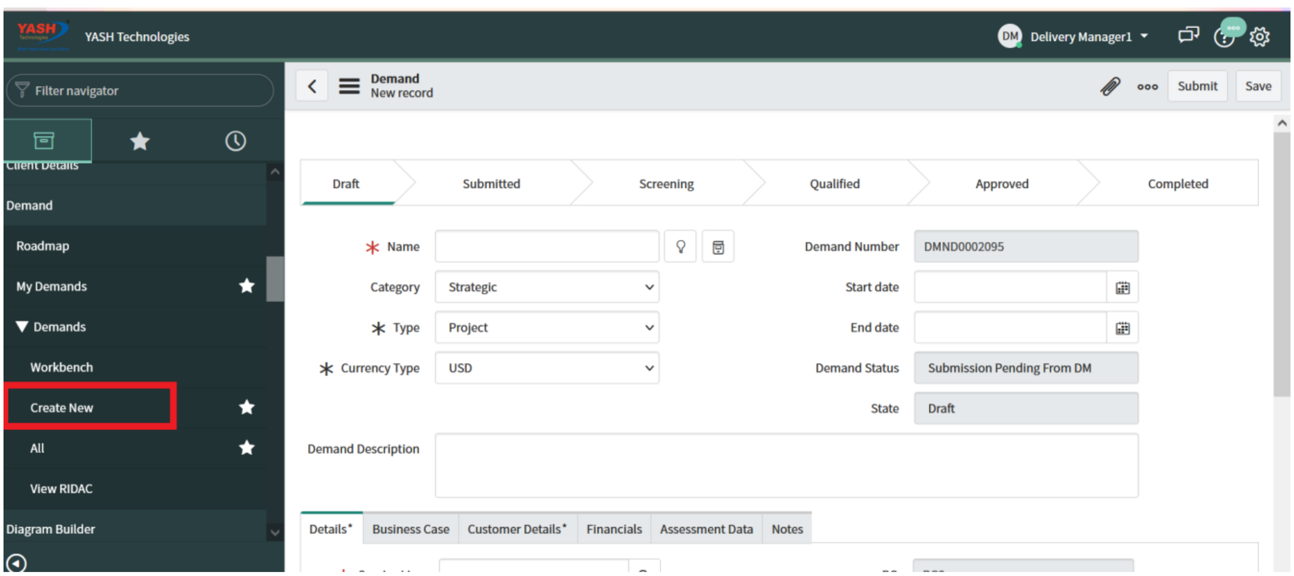
Role required: Delivery Manager

Create demand to capture your strategic and operational demands.

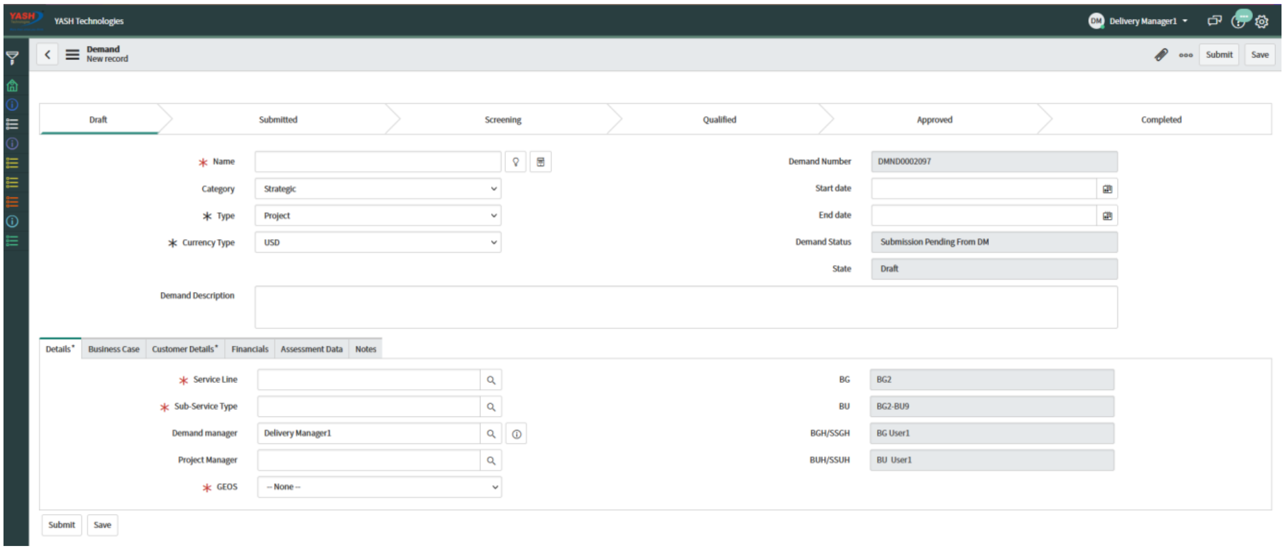
Procedure

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

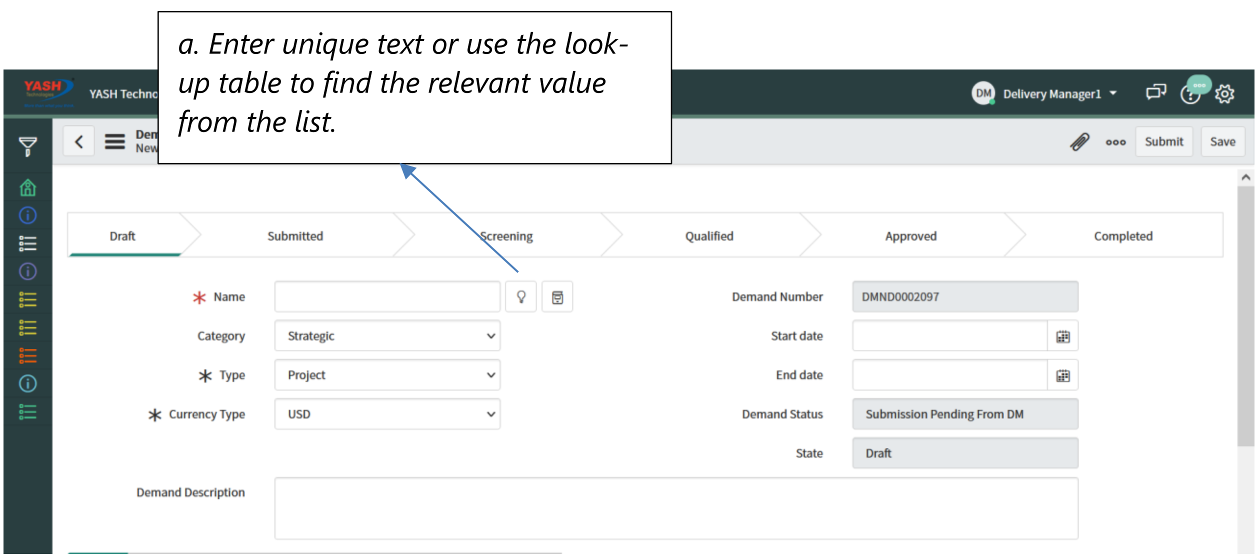
1. On the left-hand side navigator, navigate to Demand and click on ***Create New.***



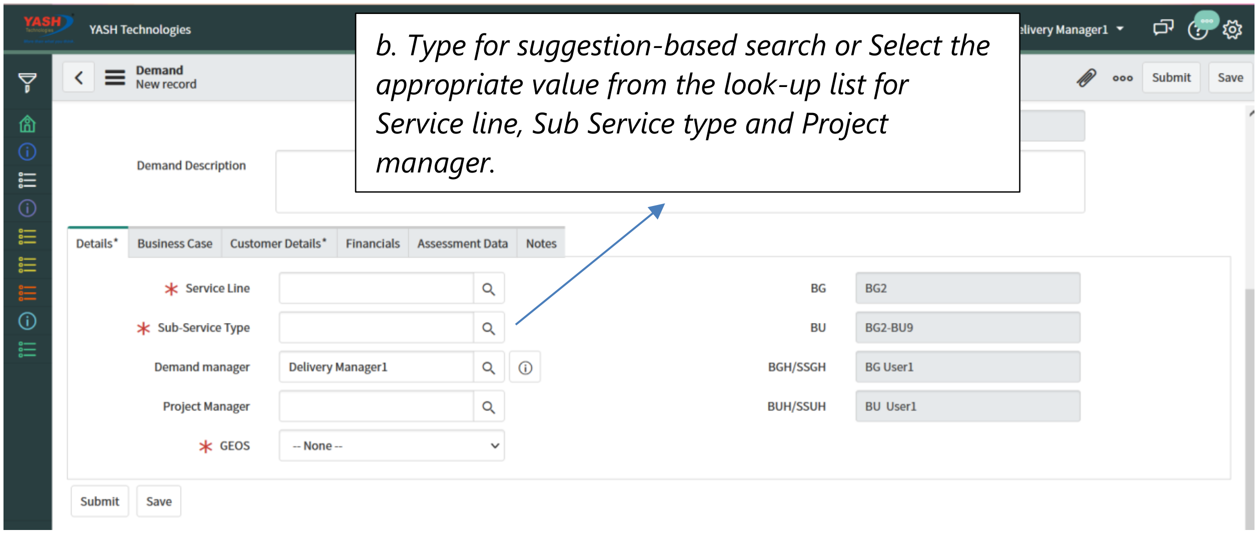
2. On the **Demand Form**, fill in the fields enter all the information in the mandatory fields.



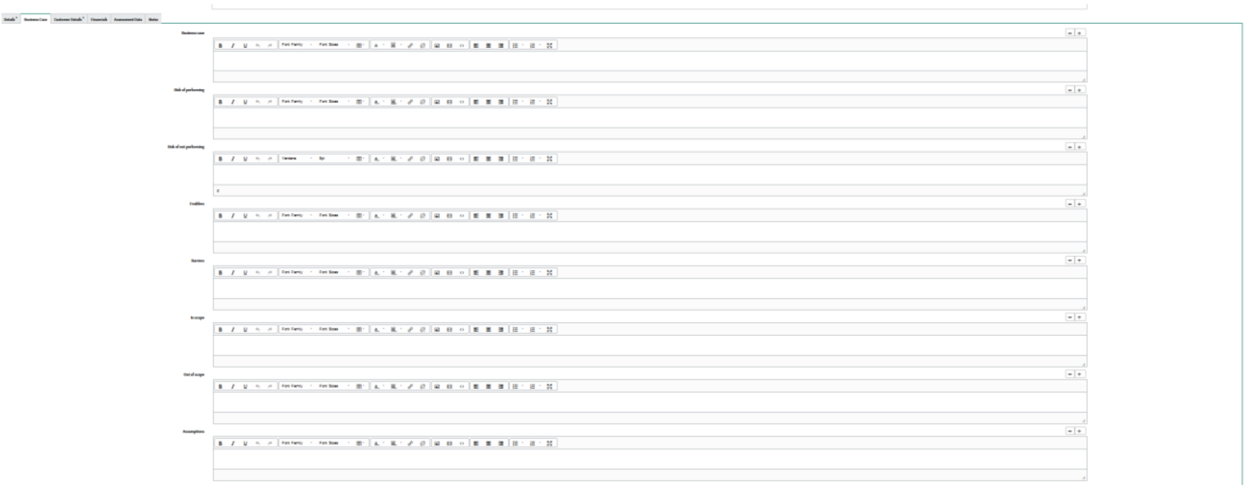
3. Fill in the details like Name, Category, Type, Currency Type, Start date, End date and Demand Description.



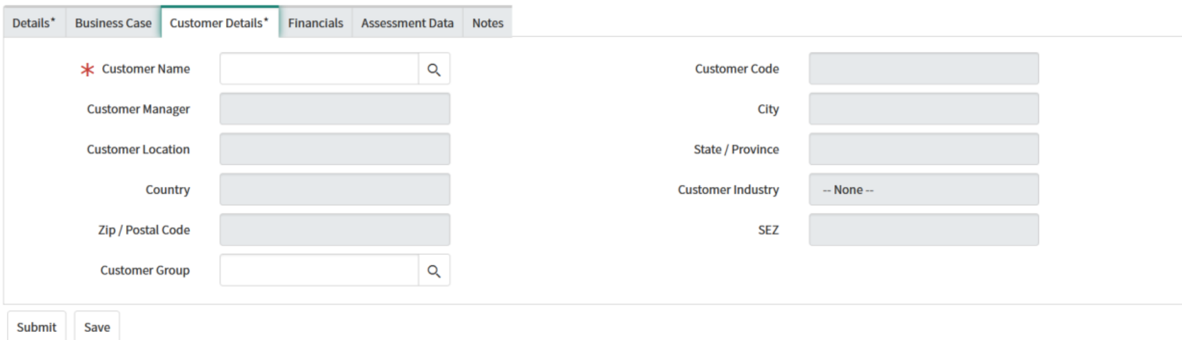
4. Under **Details** tab provide information of Portfolio/Service line, Program/Sub-Service line, Demand manager, Program manager, GEOS(Region). BG, BU, BGH/SSGH, BUH/SSUH values are automatically populated according to the Demand manager selected.

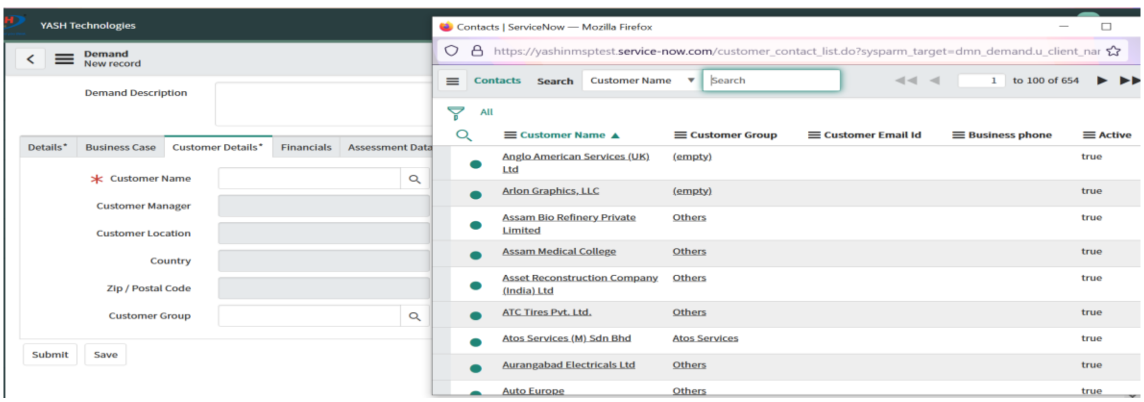


5. Under **Business Case** record business arguments that support the demand.

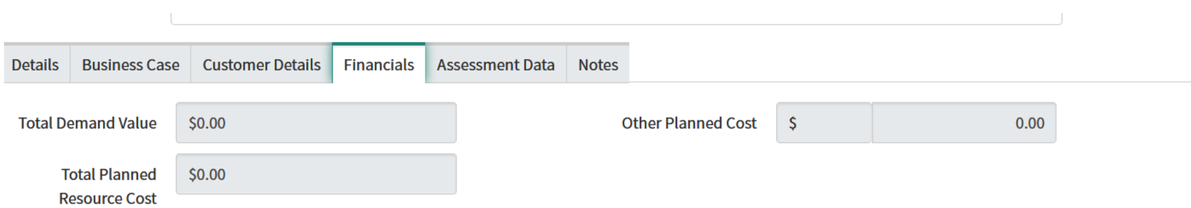


6. Under Customer Details, enter the Customer Name by typing for suggestion-based search or use the look-up table to find the relevant value from the list.

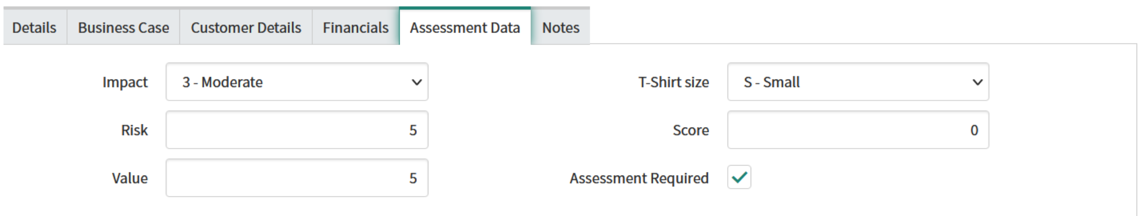


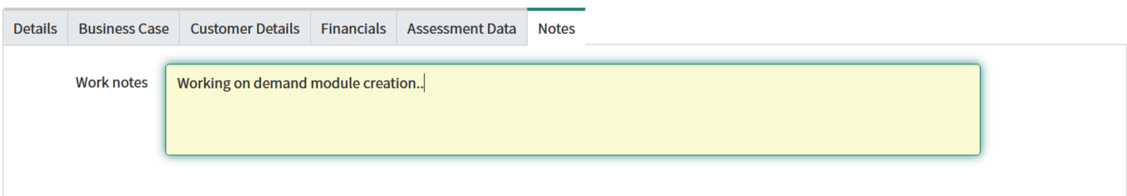


7. Under Financials, Total Demand Value and Total Planned Resource cost are auto populated.

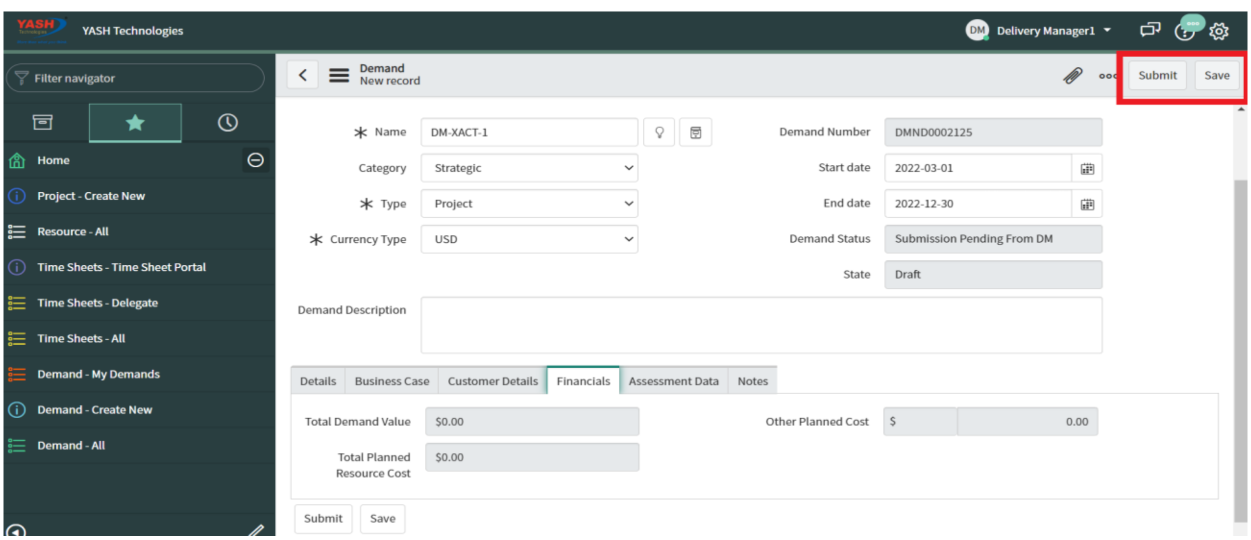


8. Fill in the details and provide notes.



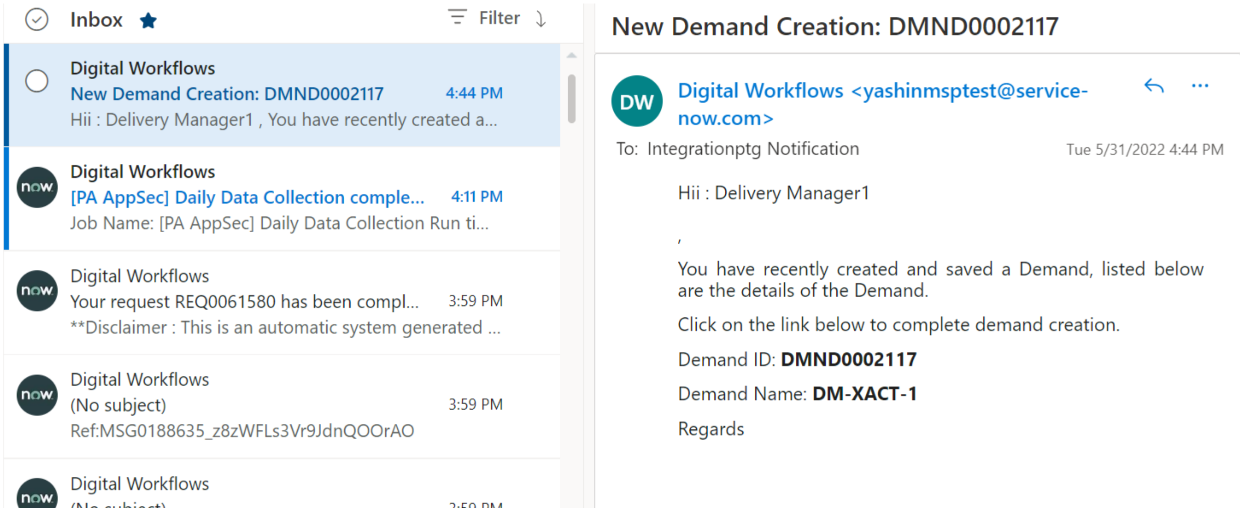


9. After filling the required fields, click on **Save** to create the demand record in the system.

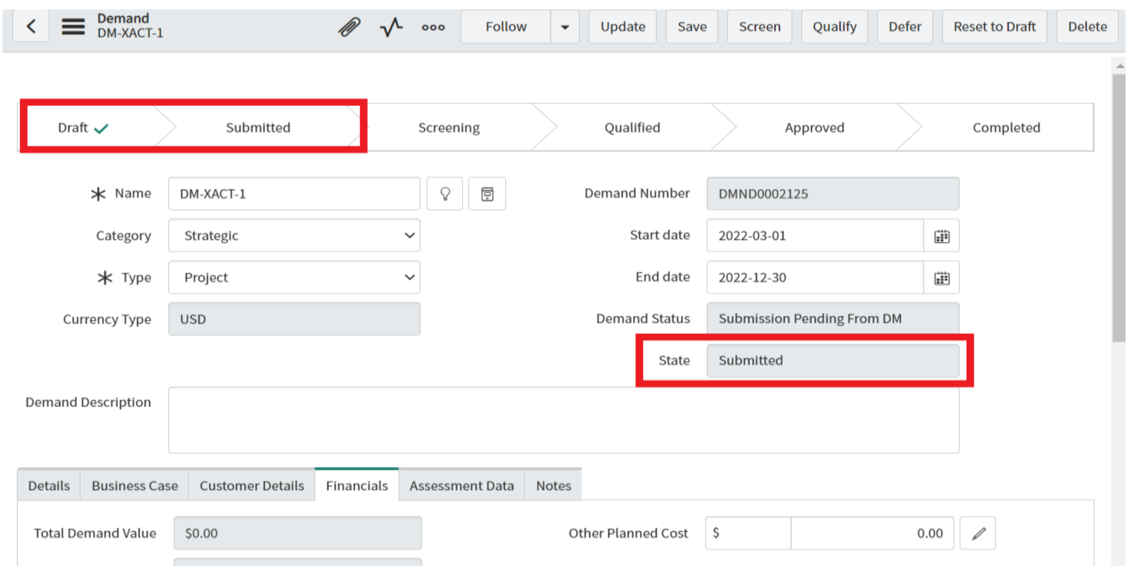


10. Click on ***Submit Demand*** (This demand will be with demand manager) for demand to get qualified.

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



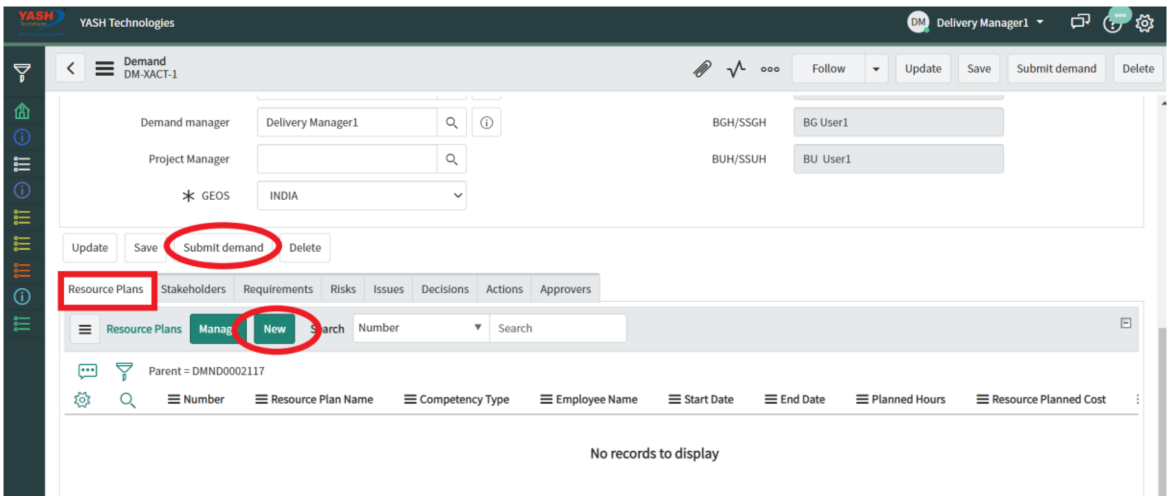
12. When creating a demand, the state will be in Draft. Once the demand is submitted, state moves to Submitted.



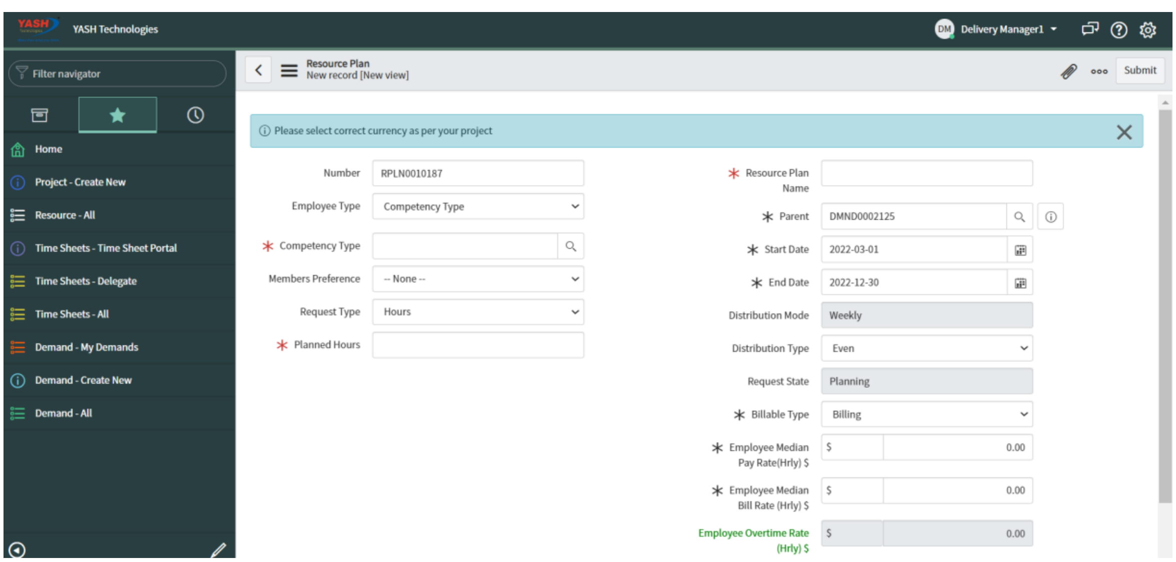
How to Create A Resource Plan

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.

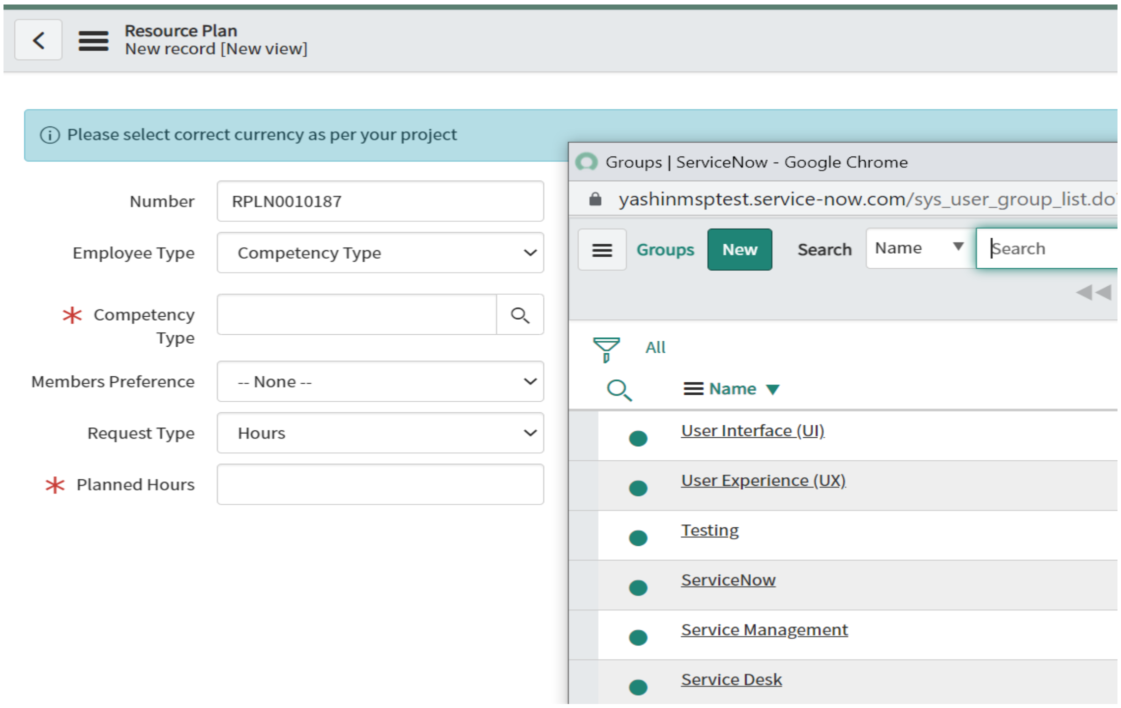
1. Click on **New** button under **Resource Plan** tab on the bottom of the screen.



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

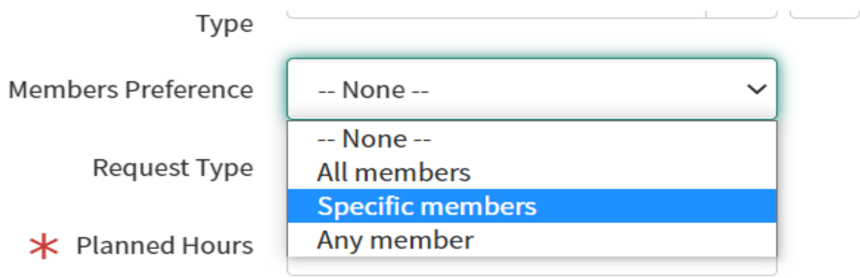


3. For the Competency Type, click on the navigator and a list will appear, select the skill type from the list as required.

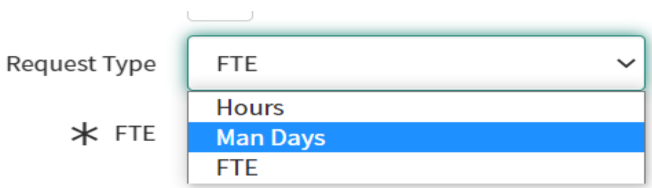


4. Select Members Preference from the drop-down list:

    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.



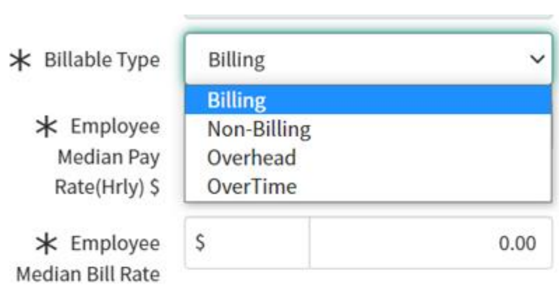
5. Select Resource Type from the dropdown.
   Note: *To specify a request in hours, select Hours. To specify a request in full-time equivalents, select FTE andMan Days and fill the details.*



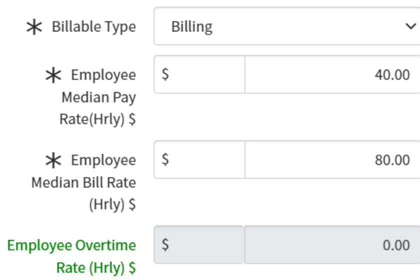
6. Fill in the details like Resource Plan Name, Start Date, End Date, Distribution type (Even, Front Lane).

- **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.

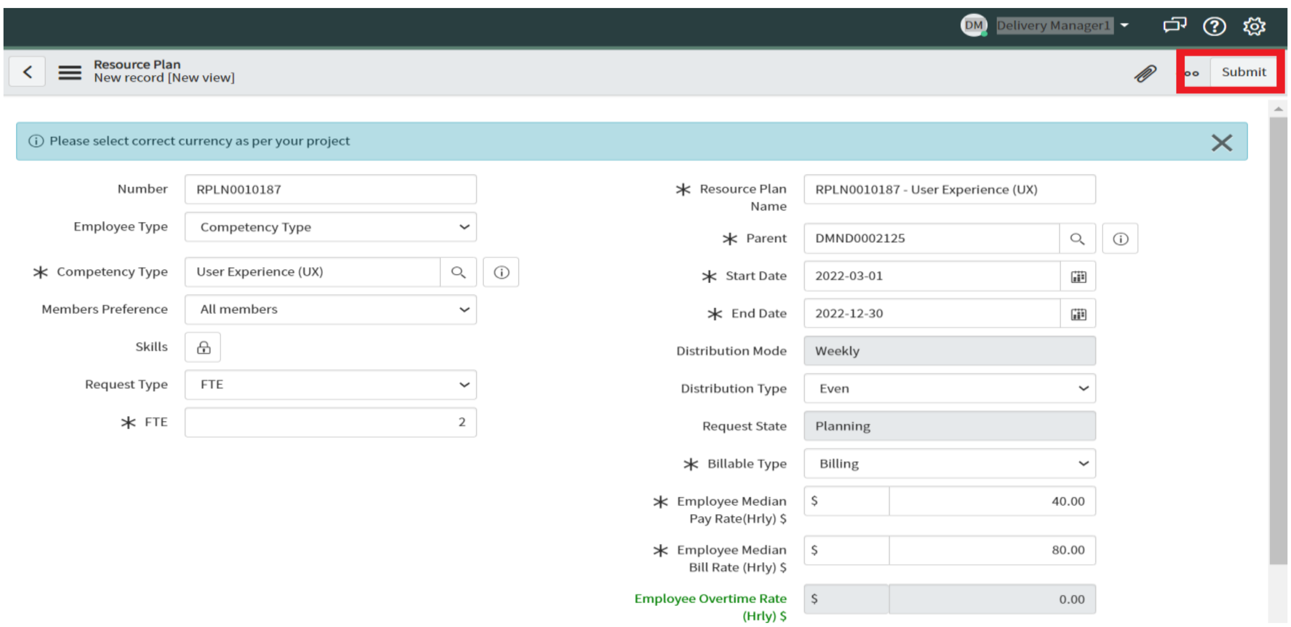
7. Select the Billable type from the dropdown.



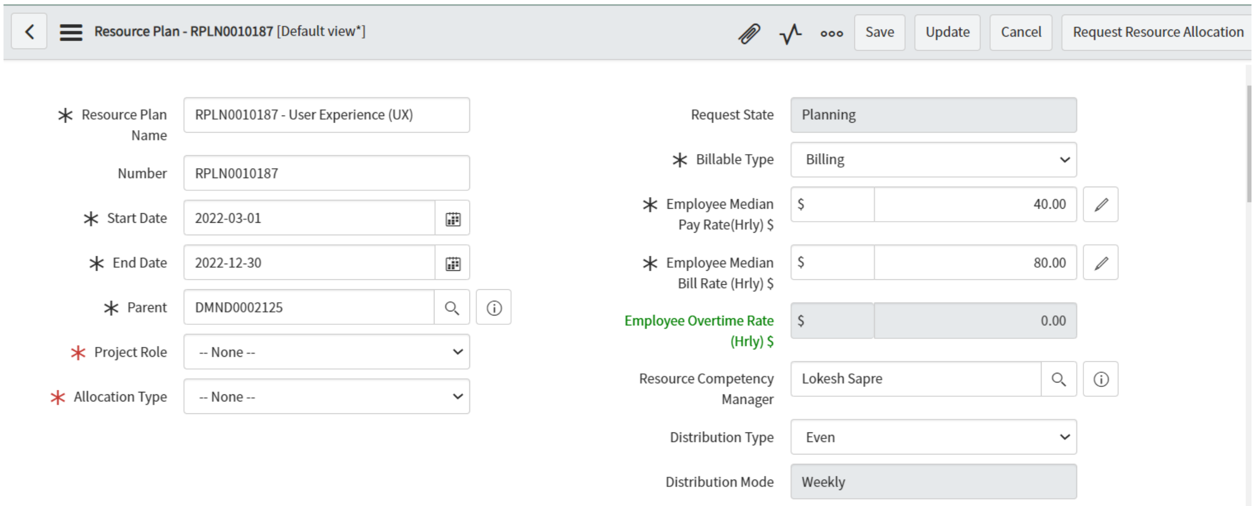
8. Enter the amount in Employee Median Pay rate and Employee Median Bill Rate.



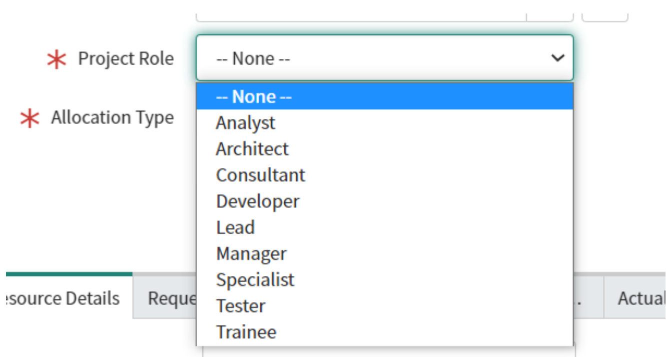
9. After filling the mandatory fields, click on **Submit** button.



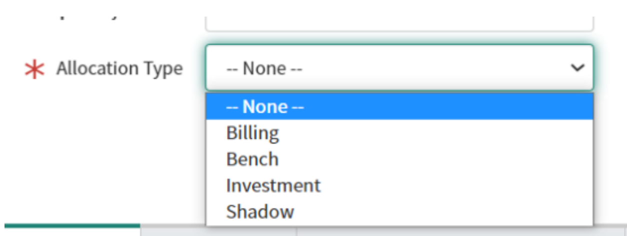
10. Once the Resource plan is submitted, some more fields are populated which are mandatory to fill.



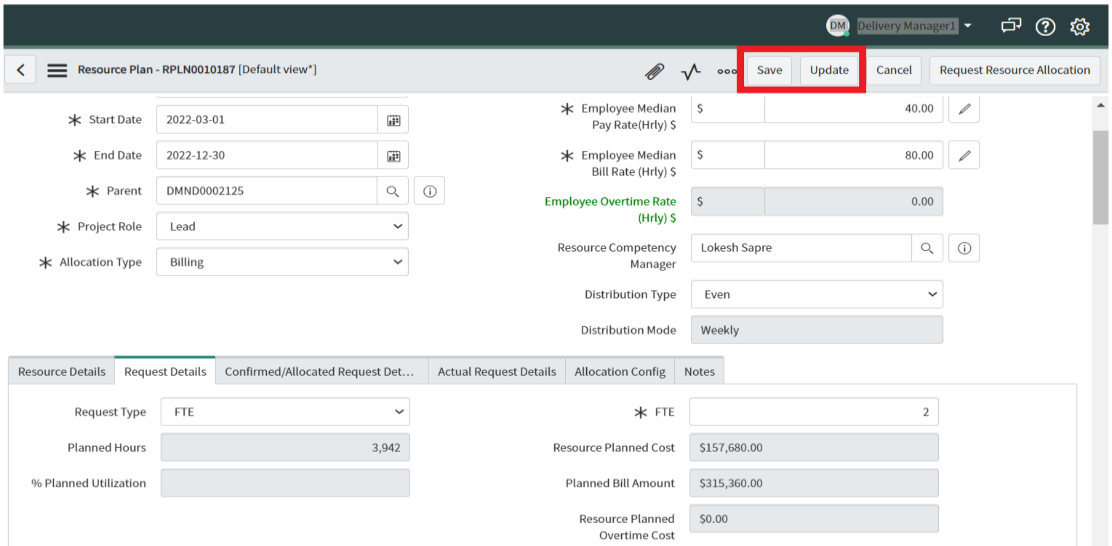
11. Select the Project Role from the dropdown.



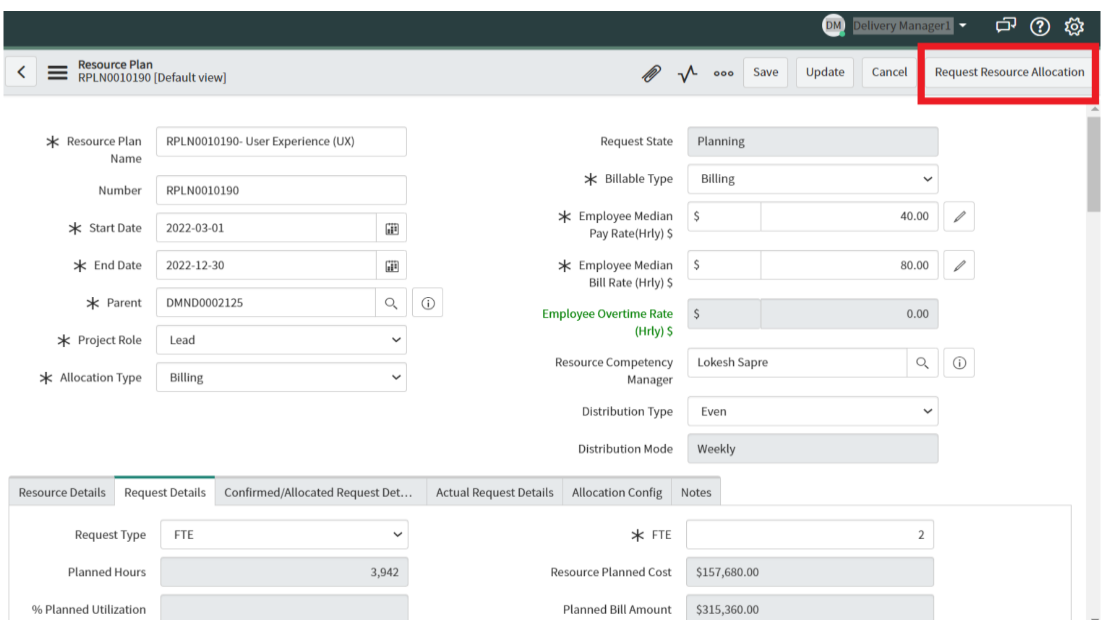
12. Select the Allocation type from the dropdown.



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

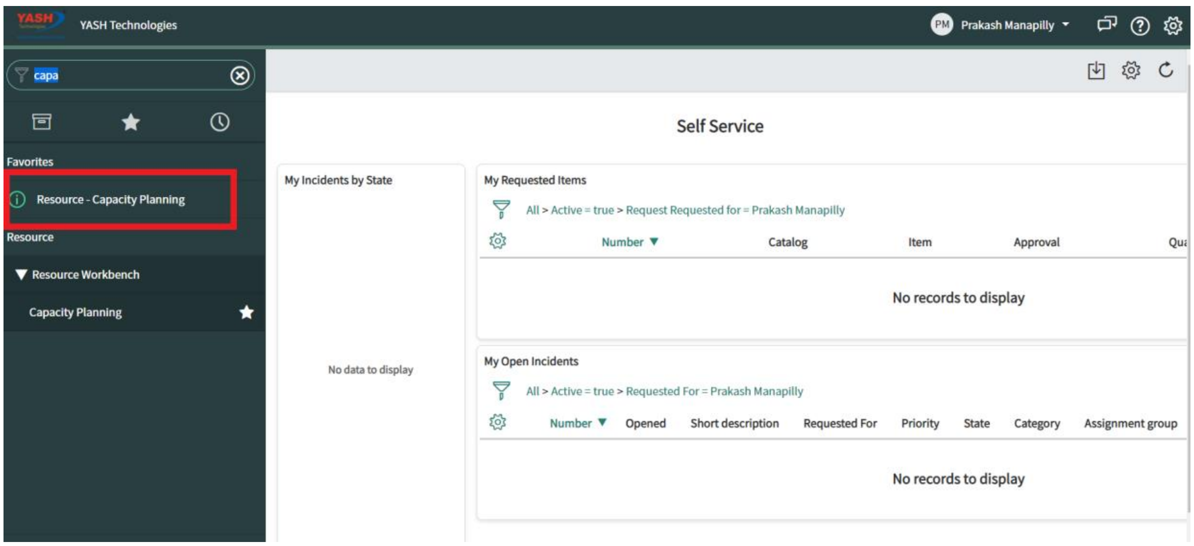


14. To request for resource, click on Request Resource Allocation.

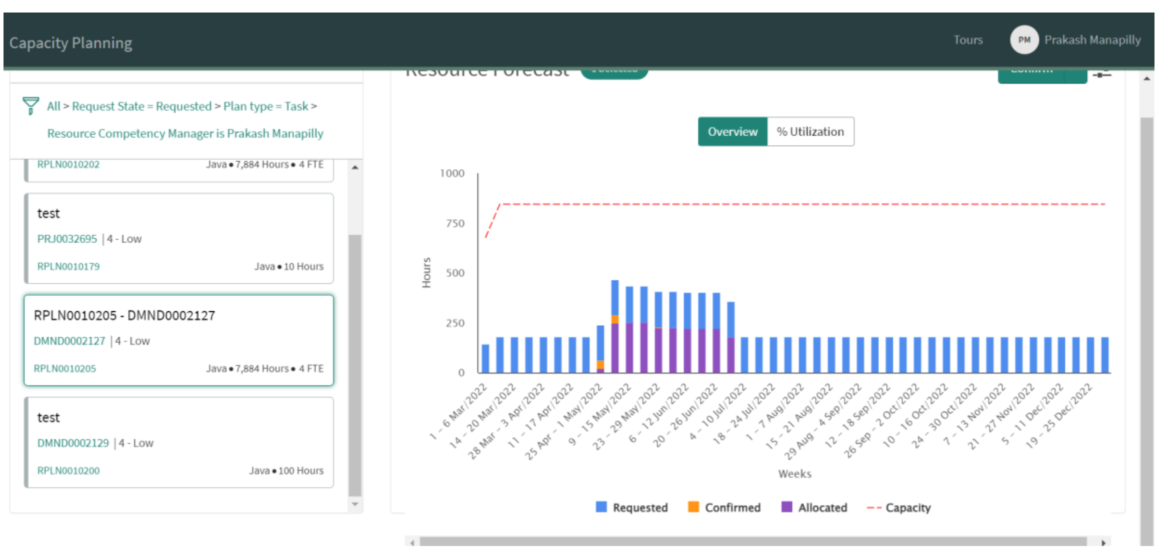


How to View Capacity Planning: Competency Manager

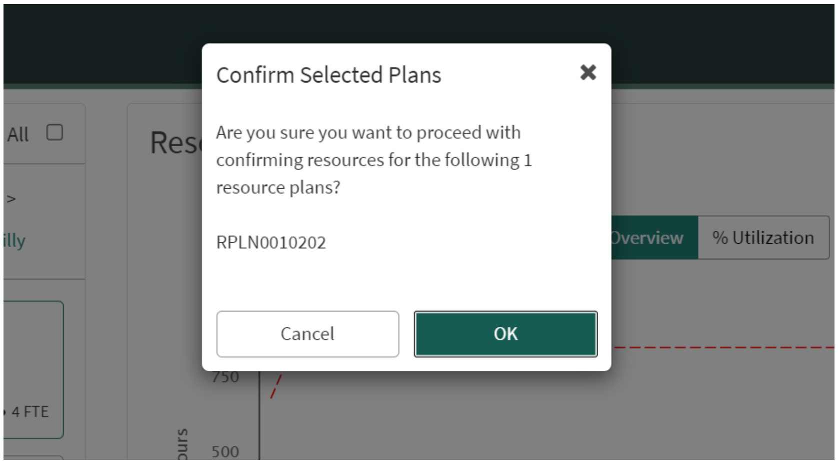
15. Once the resource plan is requested for resource allocation > Competency Manager receives an email notification. Click on the home page and using the filter navigator, search for Capacity Planning



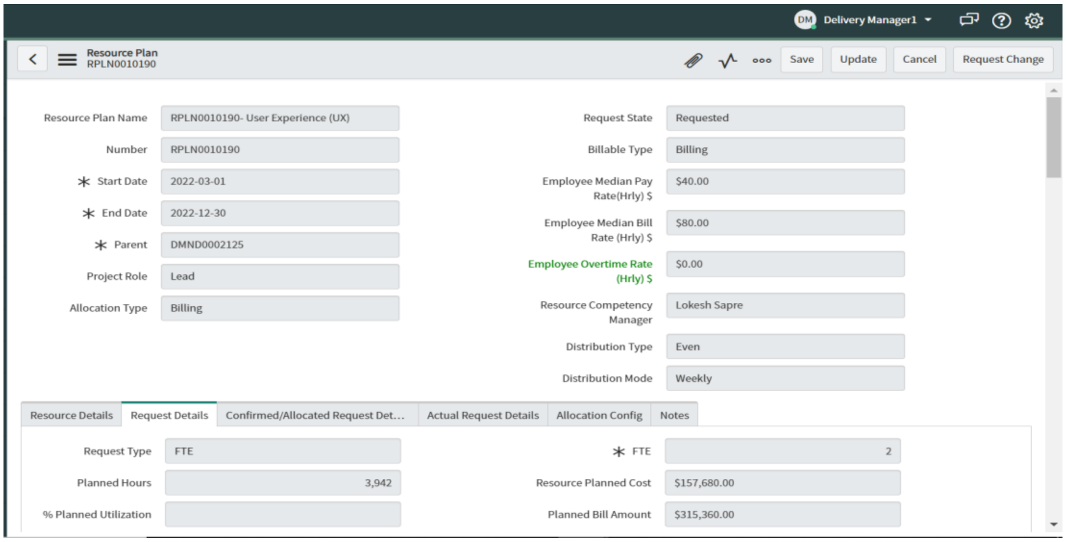
16. Click on **Capacity Planning** and the landing page will reload to the Resource Forecast page. Click on **confirm** based on availability.



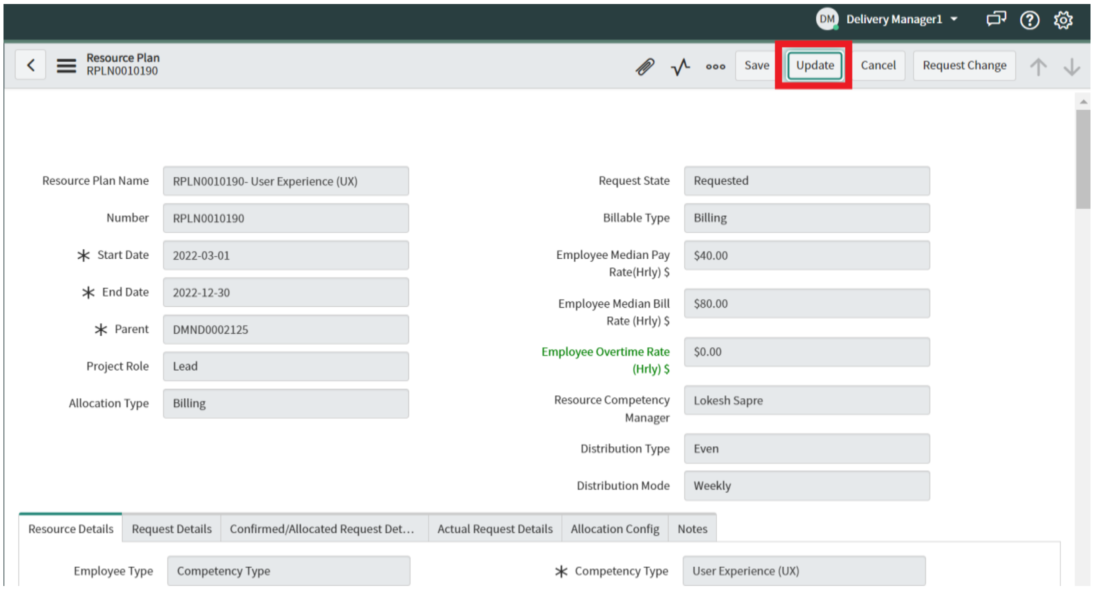
17. Click on Okay on the pop-up screen, based on the availability. Once approved, the state will change to confirmed.

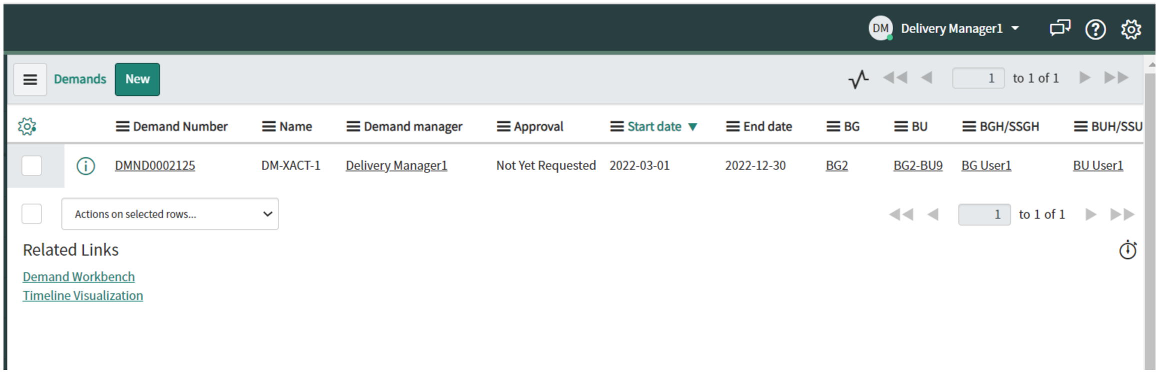


18. Once requested, the Resource plan details are locked and it will be sent to respective competency manager for Soft or Hard blocking of resources.

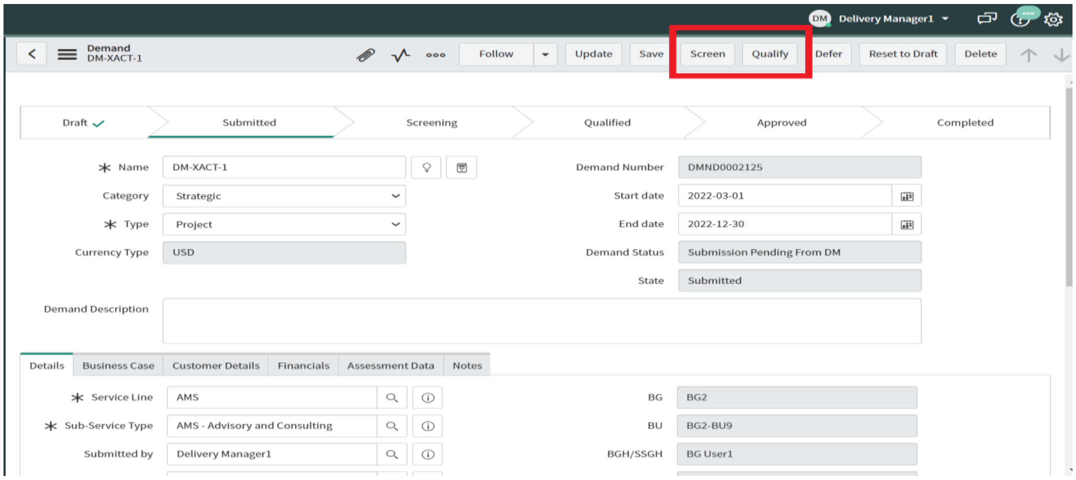


19. Click on Update button and redirected to Demand list view.

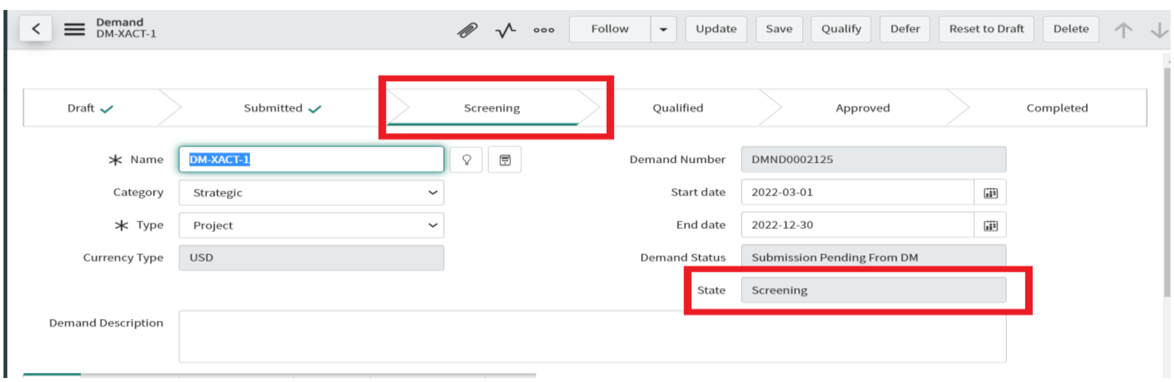




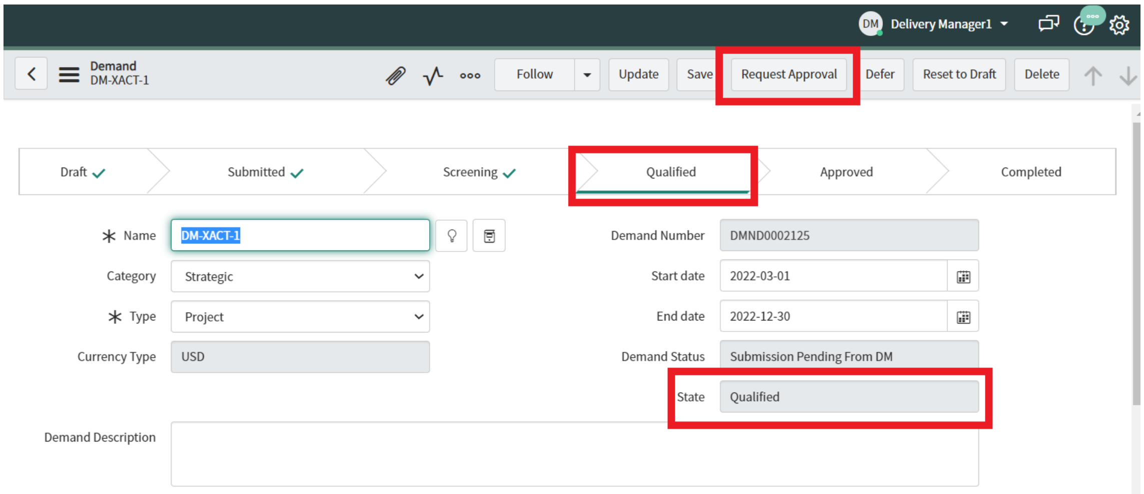
20. Click on the Existing Demand number and will be redirected to the Demand Page. Click on Screen and Qualify button to request for approval from Business Unit and Business Group.



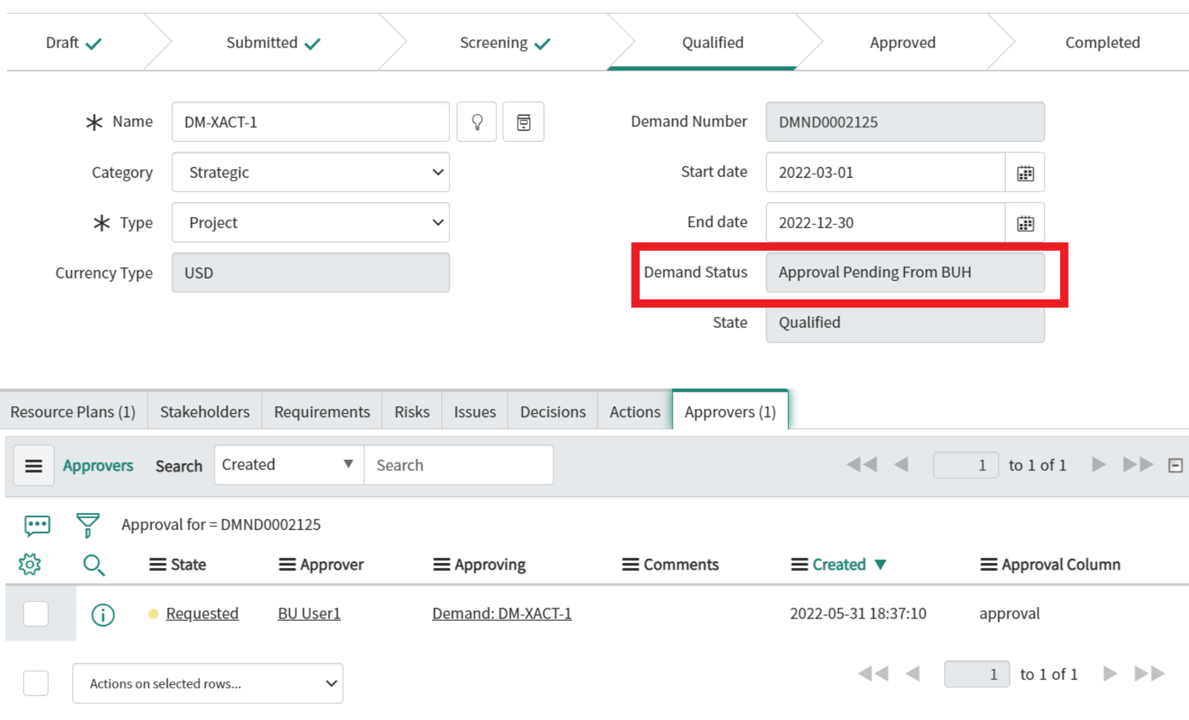
21. Once clicked on Screen, the state is moved to screening.



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.

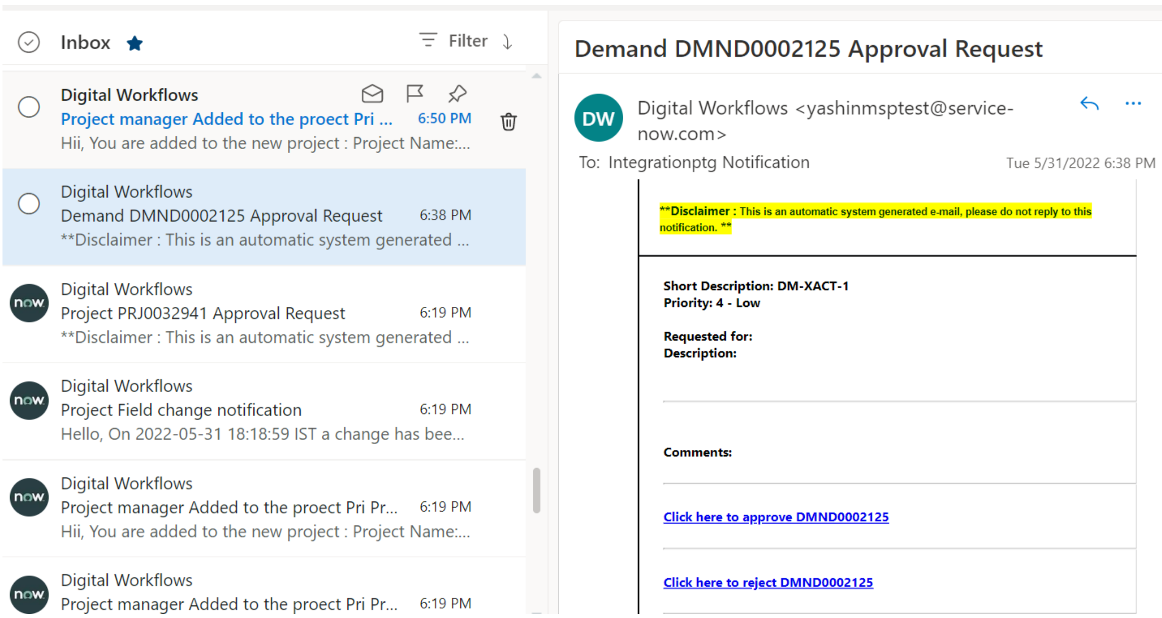


23. Once the Demand is Requested for Approval, In the Approvers tab, the list of approver names is appeared and state of the demand as Requested.

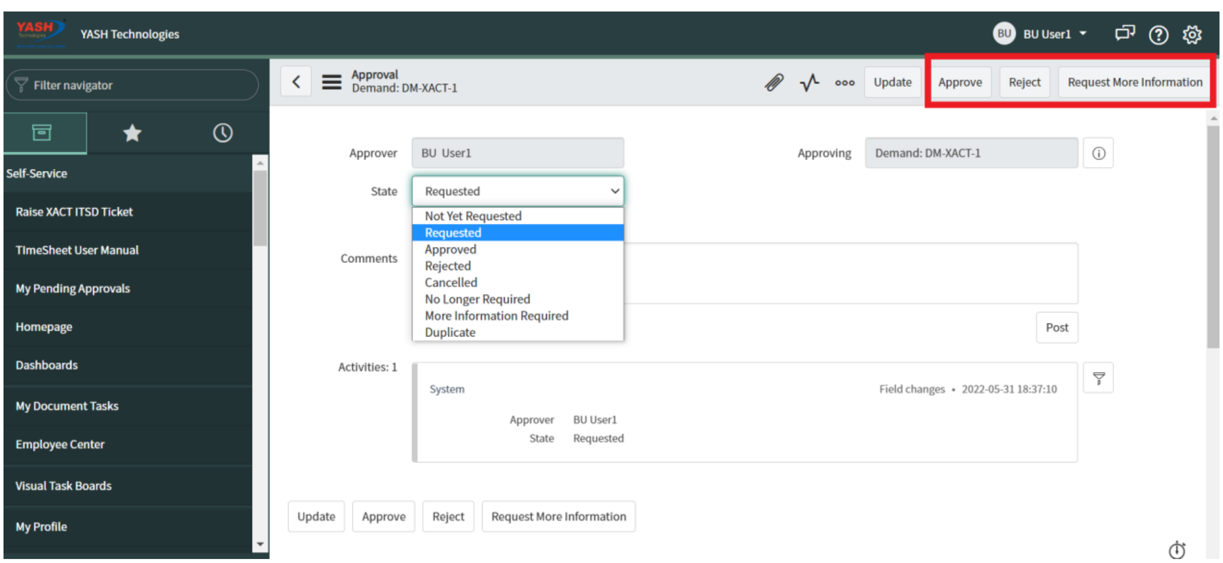


BUH & BGH Approval

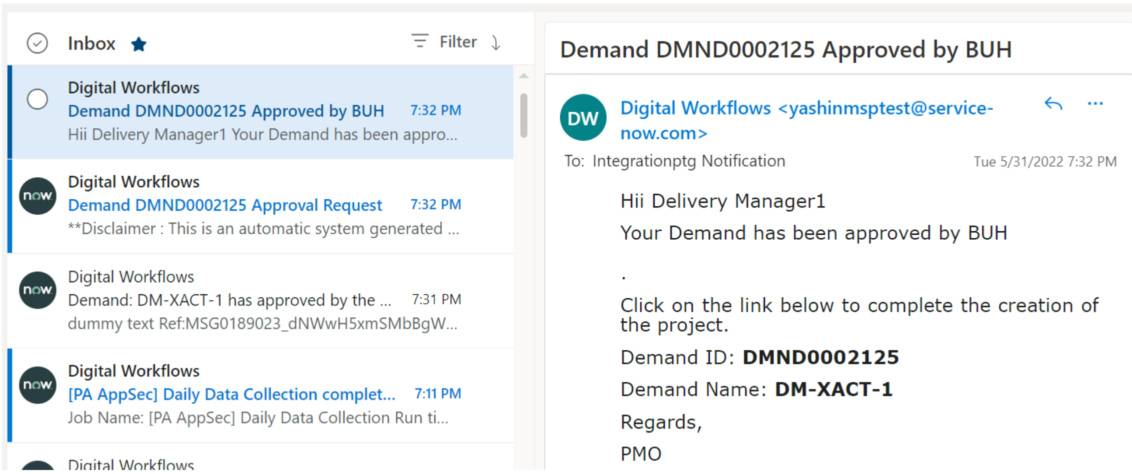
24. Once the Demand is Requested for approval, BUH receives an Email notification.



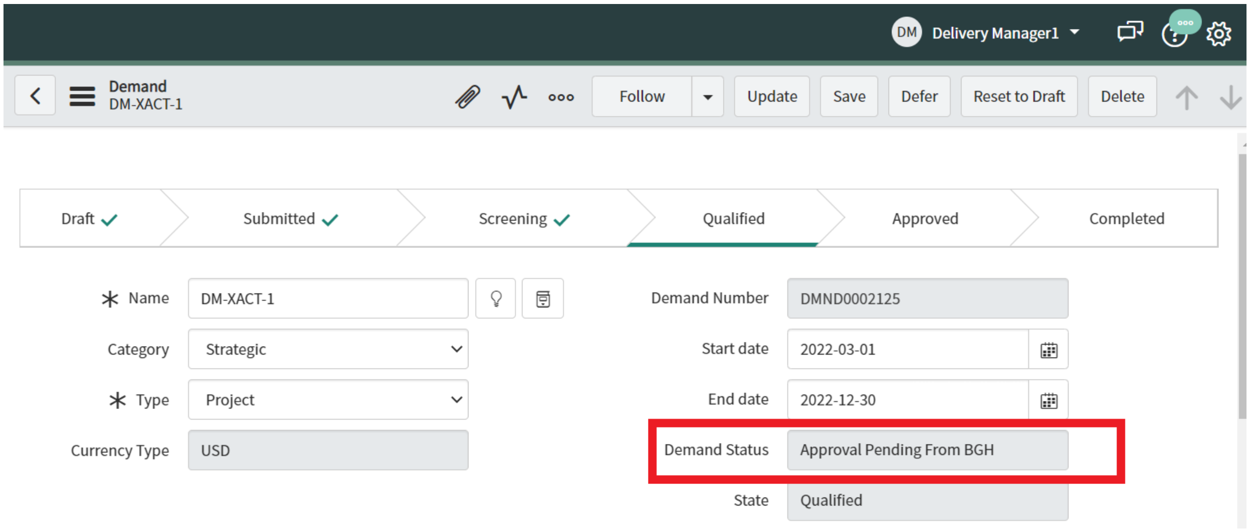
25. Click on the link provided in the Email, redirected to ServiceNow portal and from the drop down select **Approved**, then click on **Approve** from the ribbon.

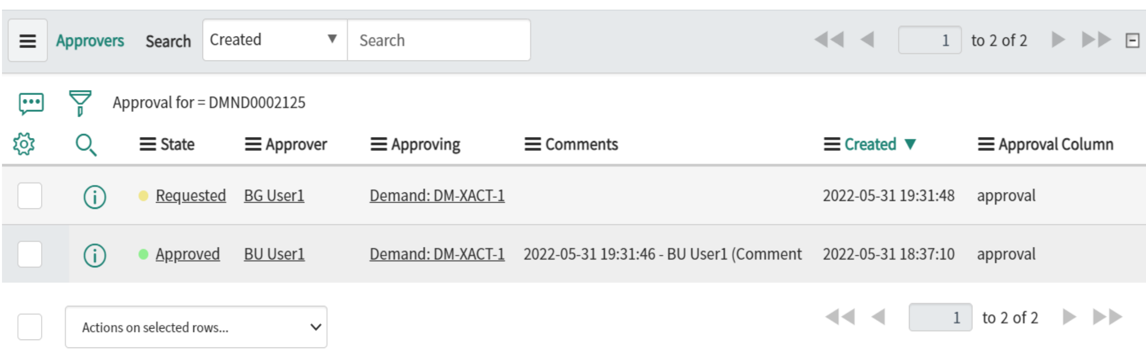


26. Once the Demand is approved by BUH, Demand manager receives an email notification as below:

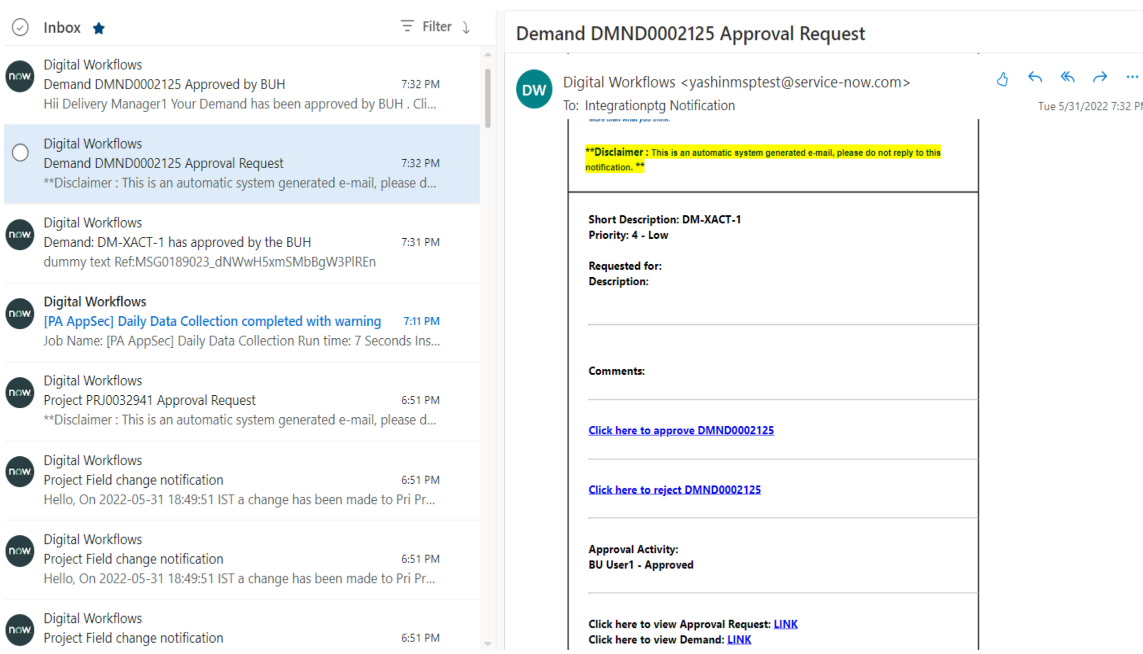


27. When the BUH approves the Demand, it will automatically redirect to BGH for approval and demand status changes as below:

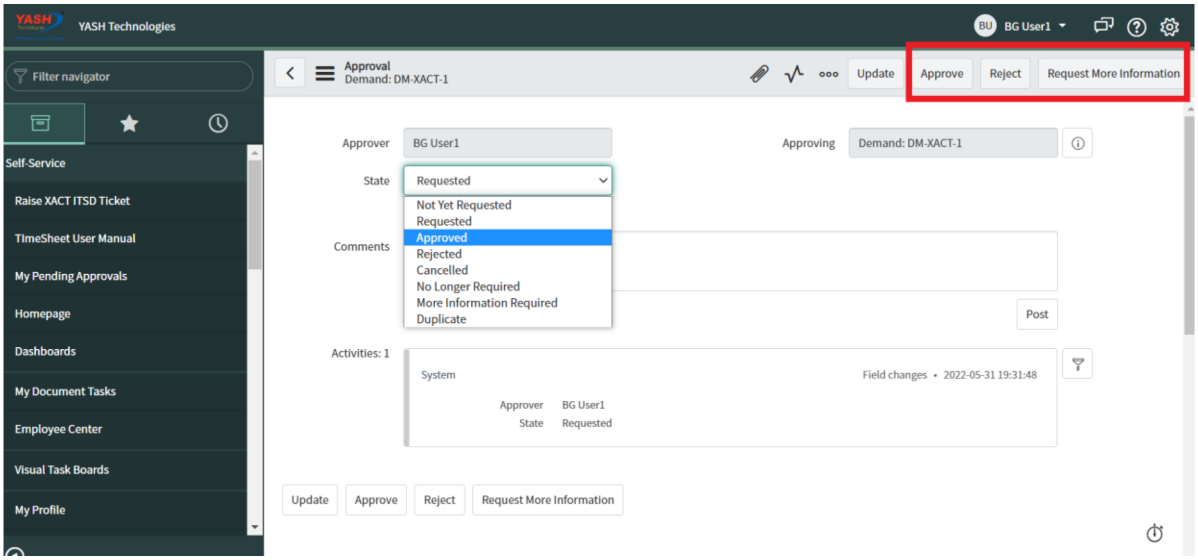




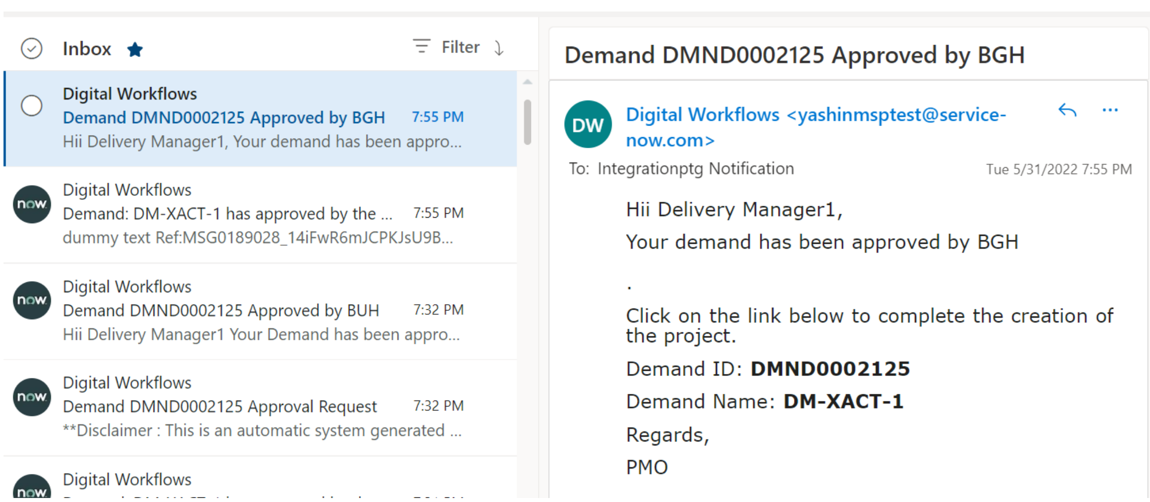
28. Once the Demand is approved by BUH, BGH receives an email notification.



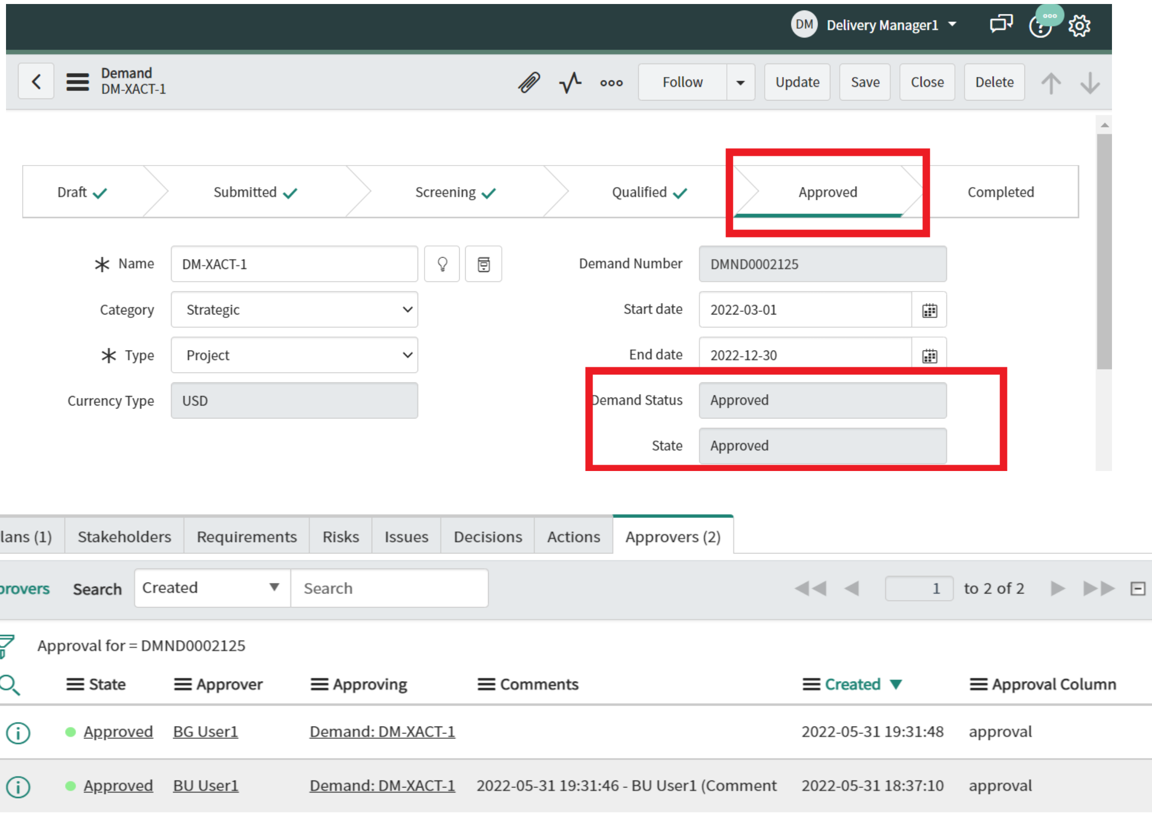
29. Click on the link provided in the email and redirected to ServiceNow Portal and from the drop down select approved, then click on Approve from the ribbon.



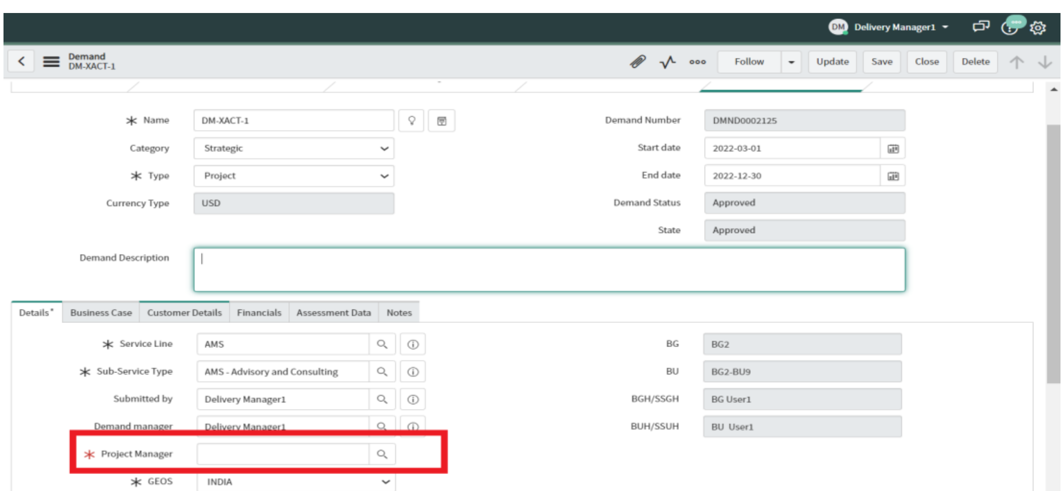
30. Once the Demand is approved by BGH, Demand manager receives an email notification as below:



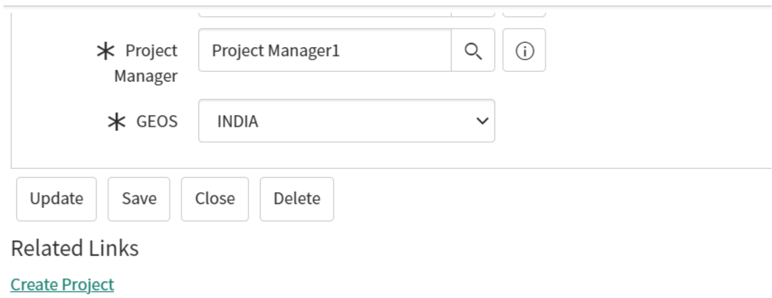
31. Once the Approval process is done, Demand manager can view the Demand and State is moved to Approved.



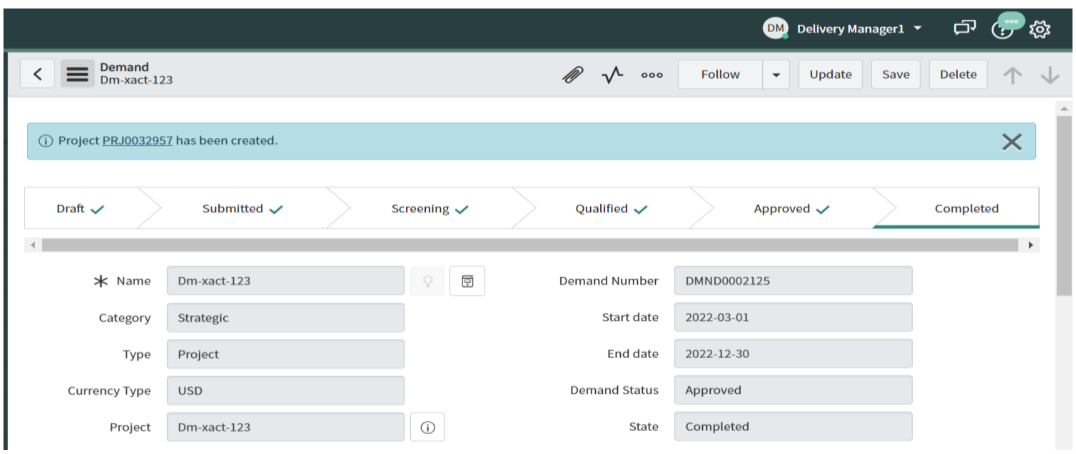
32. Demand Manager can select the Project manager name from the look-up list and click on **Save.**



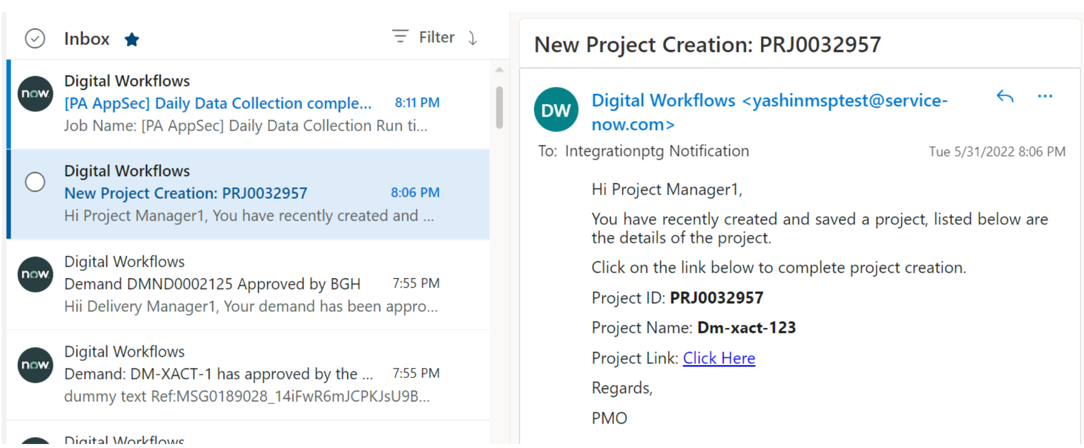
33. Project creation link will only appear once demand is approved. Click on Create Project to convert the Demand into Project.



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



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



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.