

User Manual

Project Management

Powered By – Service Now

Created By – XACT Product Team

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XACT Project Management ~ User Manual

Purpose:

To provide a high-level overview of the project management module.

Scope:

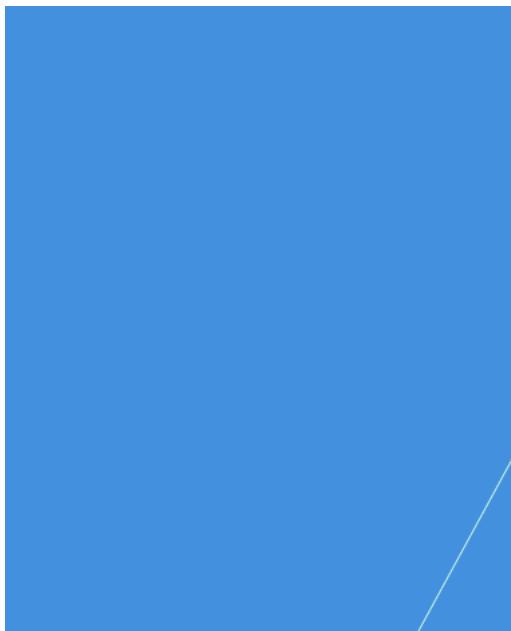
This document contains the steps to create a project and update details on service now.

Roles:

Project Manager, Delivery manager, BUH, BGH, Finance members

Walkthrough on Service Now:

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



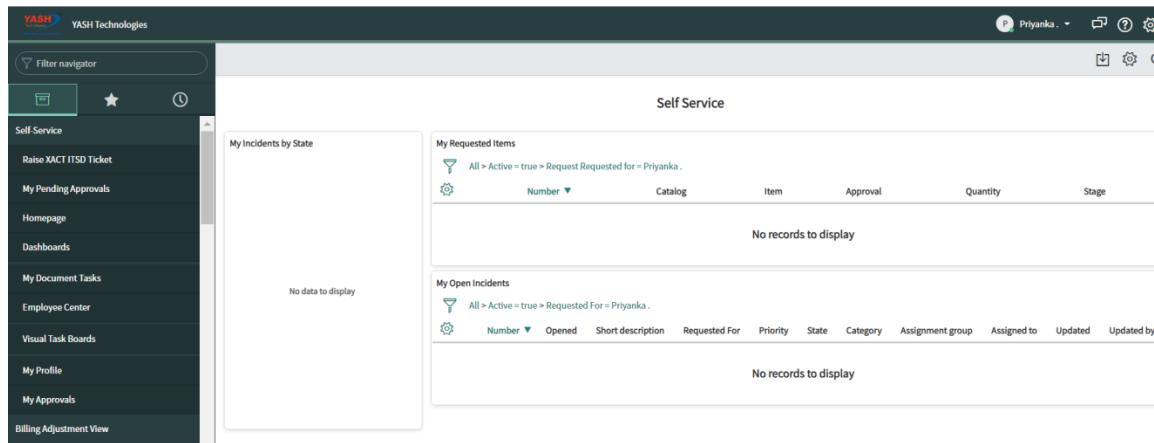
Yash-ADFS

Sign in with your organizational account

| |
|---------------------|
| yash\prashant.singh |
| |

Sign in

Landing page should show below screen as per your role.



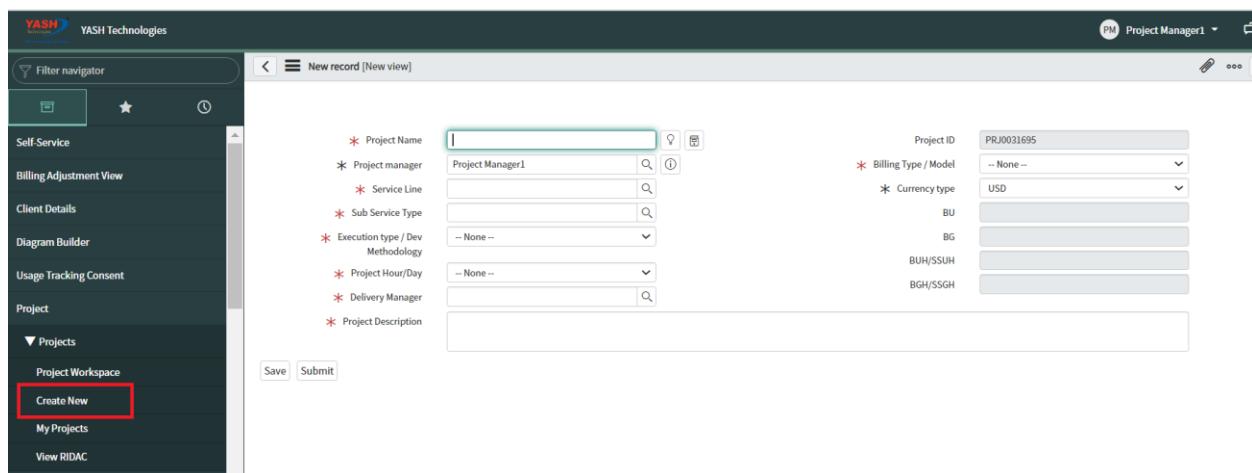
Creating A Project (Project Manager):

Before You Begin

Role required: Project Manager (it_project_manager)

Procedure

1. On Left hand side from the Projects list, navigate to Project > Create New.

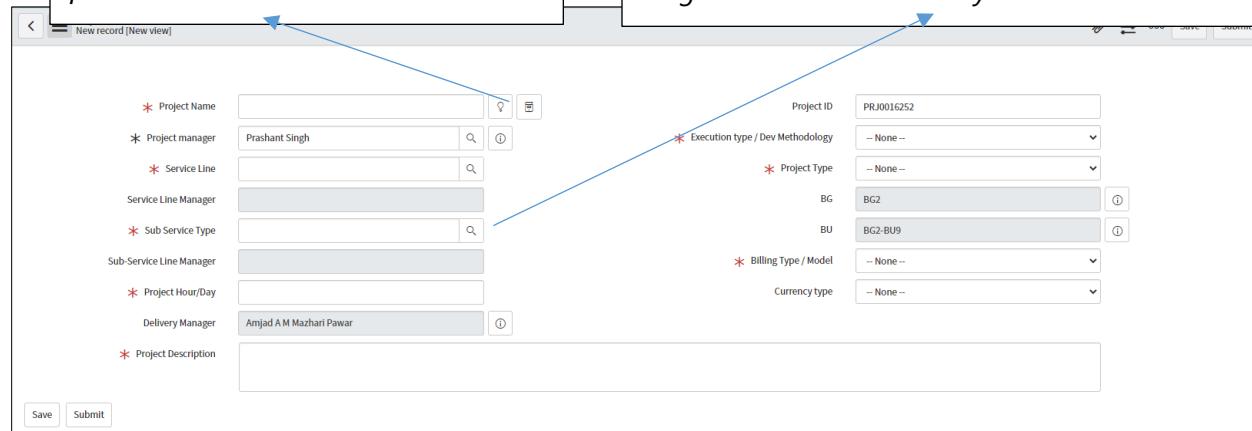


The screenshot shows the YASH Technologies Project Management application. On the left, there's a navigation sidebar with 'Self-Service', 'Billing Adjustment View', 'Client Details', 'Diagram Builder', 'Usage Tracking Consent', 'Project', 'Projects' (which is expanded), 'Project Workspace', 'Create New' (highlighted with a red box), 'My Projects', and 'View RIDAC'. The main area is titled 'New record [New view]'. It contains fields for 'Project Name' (set to 'Project Manager1'), 'Project manager' (set to 'Prashant Singh'), 'Service Line' (empty), 'Sub Service Type' (empty), 'Execution type / Dev Methodology' (empty), 'Project Hour/Day' (empty), 'Delivery Manager' (empty), 'Project Description' (empty), 'Project ID' (set to 'PRJ0031695'), 'Billing Type / Model' (empty), 'Currency type' (set to 'USD'), 'BU' (empty), 'BG' (empty), 'BUH/SSUH' (empty), and 'BGH/SSGH' (empty). At the bottom are 'Save' and 'Submit' buttons.

1. On the form, fill in the fields enter all the information in the mandatory fields.

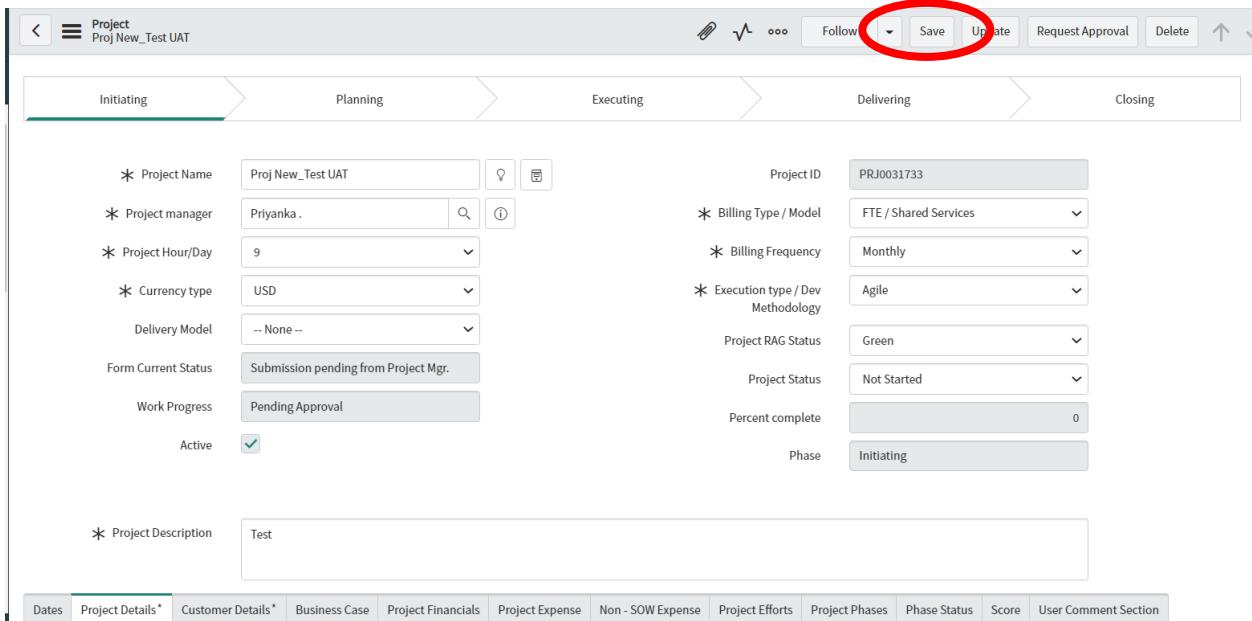
a. Enter unique text or use the look-up table to find the relevant value from the list.

b. Select Service line, Sub Service type and corresponding service line manager values will be generated automatically.



The screenshot shows the same Project Management application interface after filling in the mandatory fields. The 'Project Name' field now contains 'Prashant Singh'. The 'Project manager' field contains 'Prashant Singh'. The 'Service Line' field is empty. The 'Sub Service Type' field is empty. The 'Execution type / Dev Methodology' field is empty. The 'Project Hour/Day' field is empty. The 'Delivery Manager' field contains 'Amjad A M Mazhari Pawar'. The 'Project Description' field is empty. The other fields remain the same as in the previous screenshot. Arrows point from the explanatory text boxes to the corresponding fields in the form.

2. After filling the required fields, click on Save to create the project record in system.

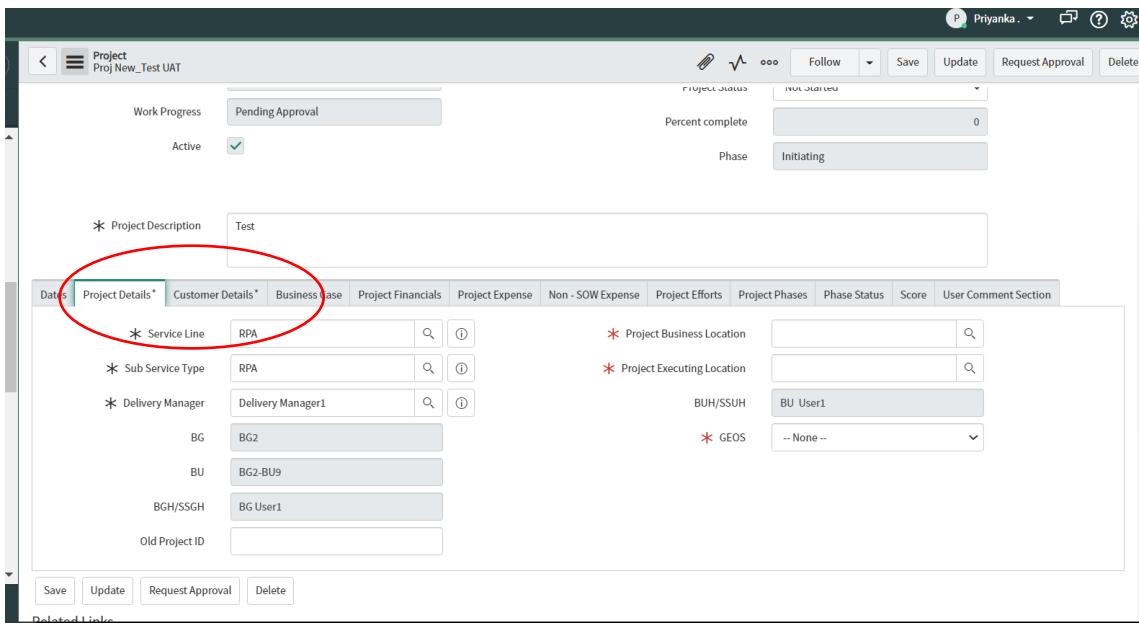


The screenshot shows the 'Project' screen for 'Proj New_Test UAT'. The top navigation bar includes 'Follow', 'Save' (highlighted with a red circle), 'Update', 'Request Approval', and 'Delete'. Below the navigation is a horizontal timeline: Initiating, Planning, Executing, Delivering, Closing. The 'Initiating' tab is selected. The main form contains the following fields:

| | | | |
|-----------------------------|--------------------------------------|------------------------------------|-----------------------|
| * Project Name | Proj New_Test UAT | Project ID | PRJ0031733 |
| * Project manager | Priyanka . | * Billing Type / Model | FTE / Shared Services |
| * Project Hour/Day | 9 | * Billing Frequency | Monthly |
| * Currency type | USD | * Execution type / Dev Methodology | Agile |
| Delivery Model | -- None -- | Project RAG Status | Green |
| Form Current Status | Submission pending from Project Mgr. | Project Status | Not Started |
| Work Progress | Pending Approval | Percent complete | 0 |
| Active | <input checked="" type="checkbox"/> | Phase | Initiating |
| * Project Description: Test | | | |

Below the form is a tab bar with 'Dates' (selected), 'Project Details*', 'Customer Details*', 'Business Case', 'Project Financials', 'Project Expense', 'Non - SOW Expense', 'Project Efforts', 'Project Phases', 'Phase Status', 'Score', and 'User Comment Section'.

3. Project should get saved and below screen should appear. Asterix means here that below tabs are yet to be filled.



The screenshot shows the 'Project' screen for 'Proj New_Test UAT' after saving. The top navigation bar includes 'Follow', 'Save' (disabled), 'Update', 'Request Approval', and 'Delete'. The main form displays the following information:

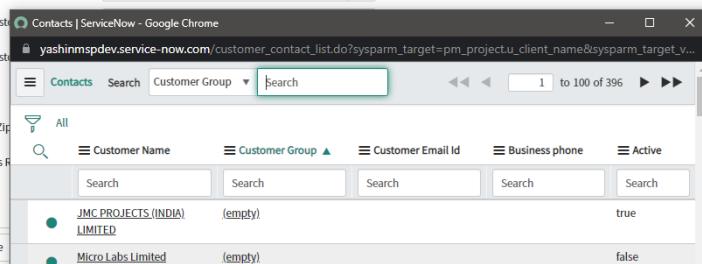
| | | | | | | | | | | | |
|---|-------------------------------------|-------------------|---------------|--------------------|-----------------|-------------------|-----------------|----------------|--------------|-------|----------------------|
| Work Progress | Pending Approval | Project Status | Not Started | | | | | | | | |
| Active | <input checked="" type="checkbox"/> | Percent complete | 0 | | | | | | | | |
| * Project Description: Test | | | | | | | | | | | |
| Dates | Project Details* | Customer Details* | Business Case | Project Financials | Project Expense | Non - SOW Expense | Project Efforts | Project Phases | Phase Status | Score | User Comment Section |
| * Service Line: RPA * Sub Service Type: RPA * Delivery Manager: Delivery Manager1 BG: BG2 BU: BG2-BU9 BGH/SSGH: BG User1 Old Project ID: <input type="text"/> | | | | | | | | | | | |

At the bottom are buttons for 'Save', 'Update', 'Request Approval', and 'Delete'.

4. Add all Project Details in below screen.

| Dates | Project Details | Customer Details | Business Case | Project Financials | Project Expense | Non - SOW Expense | Project Efforts | Project Phases | Phase Status | Score | User Comment Section |
|-------|---|----------------------|------------------------|--------------------|-----------------|-------------------|--|----------------|------------------------|------------------------|----------------------|
| | * Service Line RPA | <input type="text"/> | <input type="button"/> | | | | * Project Business Location Bangalore-Electronic City-DC | | <input type="button"/> | <input type="button"/> | |
| | * Sub Service Type RPA | <input type="text"/> | <input type="button"/> | | | | * Project Executing Location Bangalore-Electronic City-DC | | <input type="button"/> | <input type="button"/> | |
| | * Delivery Manager Delivery Manager1 | <input type="text"/> | <input type="button"/> | | | | BUH/SSUH | | | | BU User1 |
| | BG BG2 | | | | | | | | | | * GEOS APAC |
| | BU BG2-BU9 | | | | | | | | | | |
| | BGH/SSGH BG User1 | | | | | | | | | | |
| | Old Project ID | <input type="text"/> | | | | | | | | | |

5. Add customer details

| Dates | Project Details* | Customer Details* | Business Case | Non - SOW Expense | Project Expense | Project Financials | SOW Summary(Finance) | Project Efforts | Project Phases | Phase Status* | Score | User Comment Section |
|-------|------------------|--|------------------------|-------------------|-----------------|--------------------|----------------------|-----------------|----------------|---------------|-------|----------------------|
| | | * Customer Name <input type="text"/> | <input type="button"/> | | | | | | | | | |
| | |  Contacts ServiceNow - Google Chrome yashinmispdev.service-now.com/customer_contact_list.do?sysparm_target=pm_project.u_client_name&sysparm_target_v... Customer Name All Customer Name Customer Group Customer Email Id Business phone Active Search Search Search Search Search JMC PROJECTS (INDIA) LIMITED (empty) true Micro Labs Limited (empty) false | | | | | | | | | | |
| | | Customer Code <input type="text"/> | | | | | | | | | | |
| | | Customer Group <input type="text"/> | | | | | | | | | | |
| | | City <input type="text"/> | | | | | | | | | | |
| | | State / Province <input type="text"/> | | | | | | | | | | |
| | | Customer Industry -- None -- | | | | | | | | | | |
| | | SEZ <input type="text"/> | | | | | | | | | | |

6. Click on save button.

| Project | | Proj new | | | | | | | | | | | |
|------------------------|-----------------|--|------------------------|------------------------|------------------------|-------------------|-----------------|----------------|--------------|-------|----------------------|--|--|
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Work Progress | | Pending Approval | | | | | | | | | | | |
| Active | | <input checked="" type="checkbox"/> | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Percent complete | | <input type="text"/> | | | | | | | | | | | |
| Phase | | Initiating | | | | | | | | | | | |
| Project Description | | test | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Dates | Project Details | Customer Details | Business Case | Project Financials | Project Expense | Non - SOW Expense | Project Efforts | Project Phases | Phase Status | Score | User Comment Section | | |
| | | * Customer Name ATC Tires Pvt. Ltd. | <input type="text"/> | <input type="button"/> | | | | | | | | | |
| | | Customer Manager <input type="text"/> | | | | | | | | | | | |
| | | Customer Location <input type="text"/> | | | | | | | | | | | |
| | | Country <input type="text"/> | | | | | | | | | | | |
| | | Zip / Postal Code <input type="text"/> | | | | | | | | | | | |
| | | Sales Representative <input type="text"/> | | | | | | | | | | | |
| <input type="button"/> | | <input type="button"/> | <input type="button"/> | <input type="button"/> | <input type="button"/> | | | | | | | | |

7. Once new project is created then below notification should be sent to project manager:

New Project Creation: PRJ0032941

DW Digital Workflows <yashinmsptest@service-now.com> To: Integrationptg Notification Tue 5/31/2022 5:18 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: **PRJ0032941**
Project Name: **Pri Proj may**
Project Link: [Click Here](#)
Regards,
PMO

8. Below notification should be triggered for the changes/ addition done in Customer Details tab and Project Details tab:

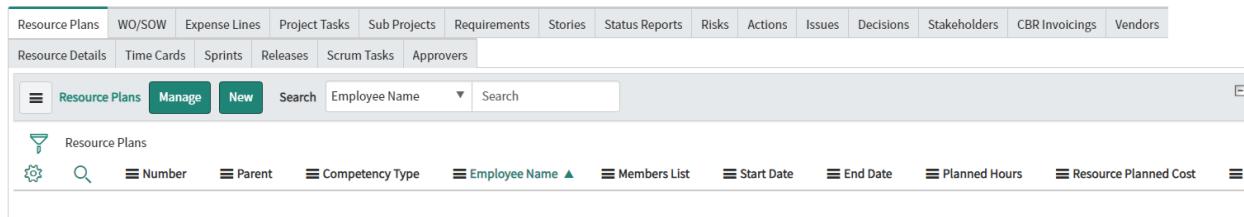
| Dates | Project Details | Customer Details | Business Case | Project Financials | Project Expense | Non - SOW Expense | Project Efforts | Project Phases | Phase Status | Score | User Comment Section |
|---|--|---|---------------|--------------------|-----------------|-------------------|-----------------|----------------|--------------|-------|----------------------|
| | * Service Line: RPA * Sub Service Type: RPA * Delivery Manager: Delivery Manager1 BG: BG2 BU: BG2-BU9 BGH/SSGH: BG User1 Old Project ID: | * Project Business Location: Bangalore-Electronic City-DC * Project Executing Location: Bangalore-Electronic City-DC BUH/SSUH: BU User1 * GEOS: AMERICAS | | | | | | | | | |
| <input type="button" value="Save"/> <input type="button" value="Update"/> <input type="button" value="Request Approval"/> <input type="button" value="Delete"/> | | | | | | | | | | | |

Project Field change notification

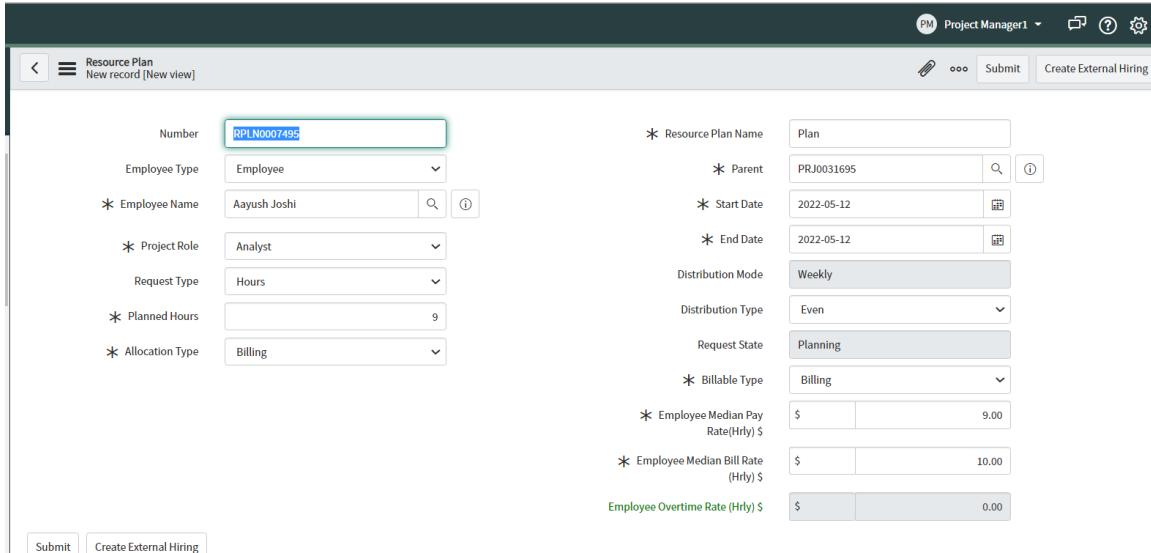
DW Digital Workflows <yashinmsptest@service-now.com> To: Integrationptg Notification Tue 5/31/2022 5:19 PM

Hello,
On 2022-05-31 17:18:20 IST a change has been made to [Pri Proj may](#) by Project Manager1
Fields updated:
Customer Name has changed from to *BNY Mellon Technology Private Limited*
Project Business Location has changed from to *Bangalore-Electronic City-DC*
Billing Frequency has changed from to *Weekly*
Project Executing Location has changed from to *Bangalore-Electronic City-DC*
GEOS has changed from to *AMERICAS*

9. Now Navigate back to project and go to the bottom of project page and click on resource plan tab. Click New button and enter all mandatory details.

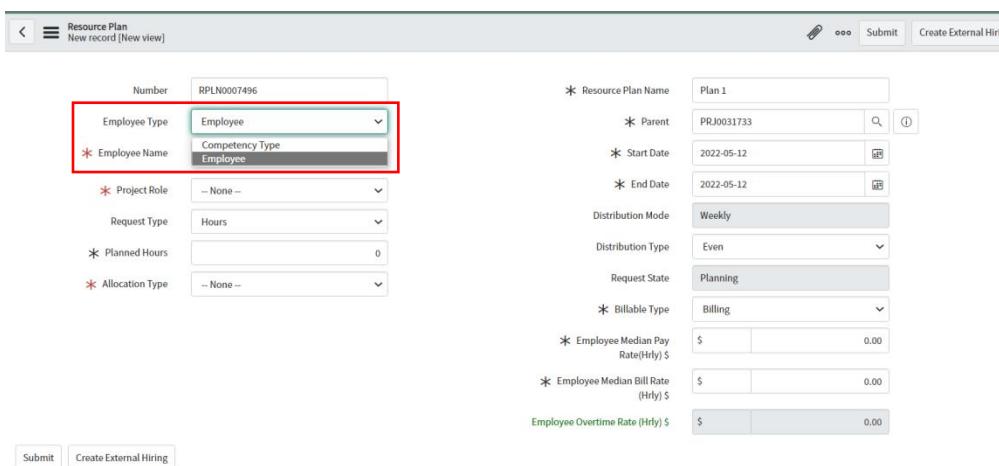


10. Enter all mandatory details and click on submit button.



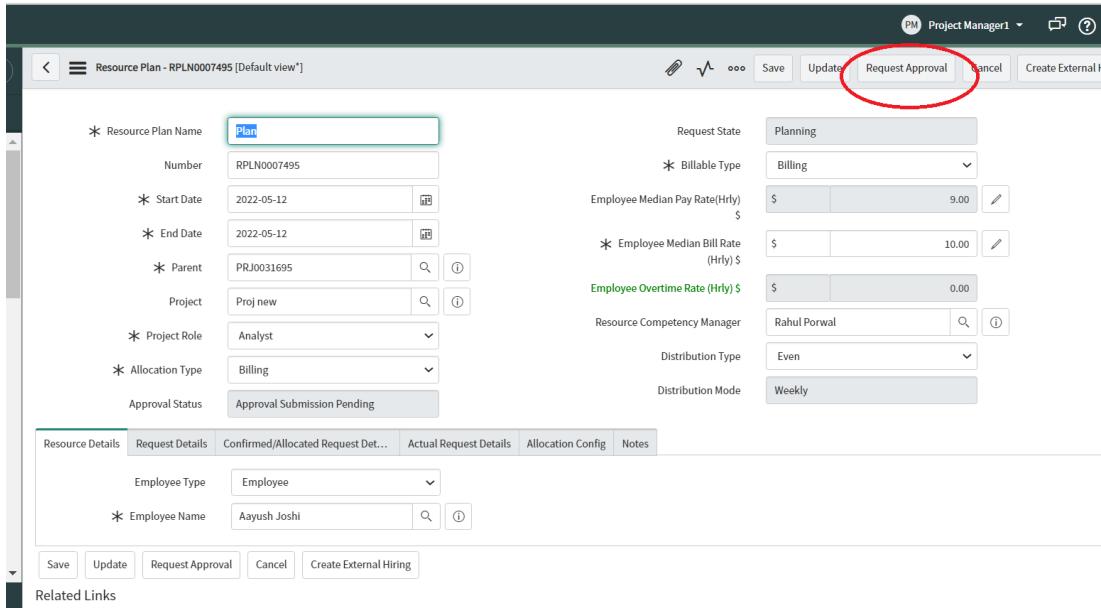
| | | | |
|-------------------|--------------|--|------------|
| Number | RPLN0007495 | * Resource Plan Name | Plan |
| Employee Type | Employee | * Parent | PRJ0031695 |
| * Employee Name | Aayush Joshi | * Start Date | 2022-05-12 |
| * Project Role | Analyst | * End Date | 2022-05-12 |
| Request Type | Hours | Distribution Mode | Weekly |
| * Planned Hours | 9 | Distribution Type | Even |
| * Allocation Type | Billing | Request State | Planning |
| | | * Billable Type | Billing |
| | | * Employee Median Pay Rate(Hrly) \$ | \$ 9.00 |
| | | * Employee Median Bill Rate (Hrly) \$ | \$ 10.00 |
| | | Employee Overtime Rate (Hrly) \$ | \$ 0.00 |

11. Project manager should be able to select either **employee or the competency type if resource detail is not known.**



| | | | |
|-------------------|-----------------|--|------------|
| Number | RPLN0007496 | * Resource Plan Name | Plan 1 |
| Employee Type | Employee | * Parent | PRJ0031733 |
| * Employee Name | Employee | * Start Date | 2022-05-12 |
| * Project Role | — None — | * End Date | 2022-05-12 |
| Request Type | Hours | Distribution Mode | Weekly |
| * Planned Hours | 0 | Distribution Type | Even |
| * Allocation Type | — None — | Request State | Planning |
| | | * Billable Type | Billing |
| | | * Employee Median Pay Rate(Hrly) \$ | \$ 0.00 |
| | | * Employee Median Bill Rate (Hrly) \$ | \$ 0.00 |
| | | Employee Overtime Rate (Hrly) \$ | \$ 0.00 |

12. Click on Request for Approval, so that request is sent to Delivery manager for approving resource.



The screenshot shows a software interface for managing resource plans. At the top, there's a toolbar with various icons and buttons. The 'Request Approval' button is highlighted with a red circle. Below the toolbar, there are several input fields for resource plan details such as Name, Start Date, End Date, Parent, Project, Role, Allocation Type, and Approval Status. To the right of these, there are sections for Request State (Planning), Billable Type (Billing), Employee Median Pay Rate (Hrly) (\$ 9.00), Employee Median Bill Rate (Hrly) (\$ 10.00), Employee Overtime Rate (Hrly) (\$ 0.00), Resource Competency Manager (Rahul Porwal), Distribution Type (Even), and Distribution Mode (Weekly). At the bottom, there are tabs for Resource Details, Request Details, Confirmed/Allocated Request Det..., Actual Request Details, Allocation Config, and Notes. Below these tabs, there are dropdowns for Employee Type (Employee) and Employee Name (Aayush Joshi), along with Save, Update, Request Approval, Cancel, and Create External Hiring buttons. A 'Related Links' section is also present at the bottom.

13. Notification will get triggered to delivery manager for approving new Resource.

Resource Plan is Pending for approval: RPLN0010188

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

Hi Delivery Manager1,

New resource plan is pending for your approval, below are the details:

Resource Plan ID: **RPLN0010188**

Project ID: **PRJ0032941**

Project Name: **Pri Proj may**

Resource Plan Link : [Click here](#)

Regards,

PMO

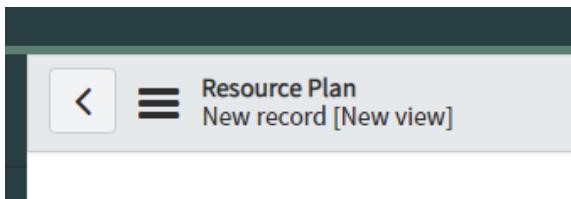
14. And once resource is approved by delivery manager then below email is triggered to project manager:

Resource Plan is Approved: RPLN0010188

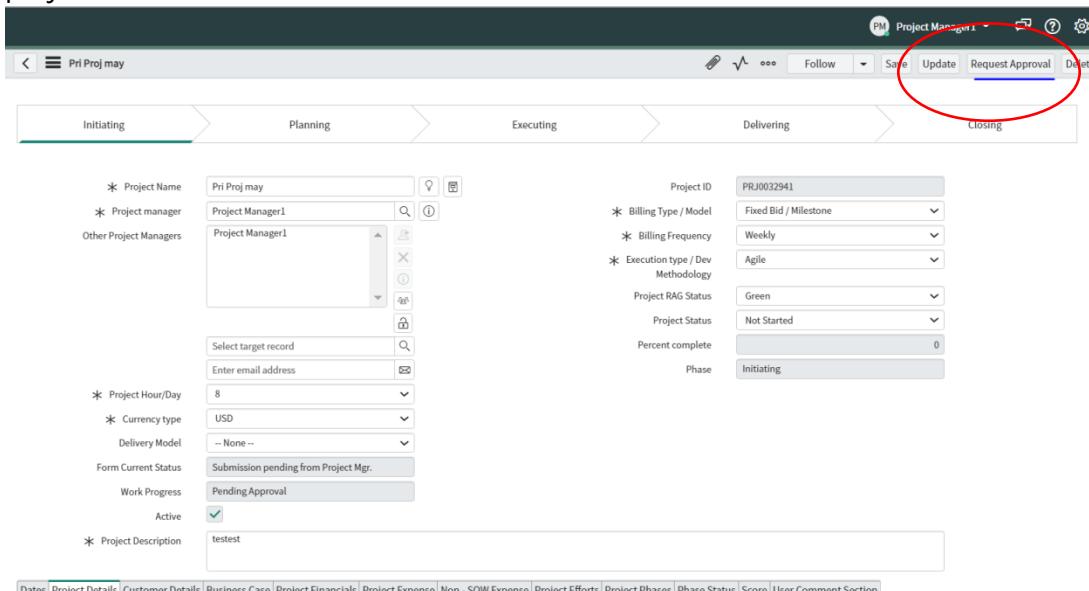
DW Digital Workflows <yashinmsptest@service-now.com>
 To: Integrationtg Notification
 Tue 5/31/2022 5:39 PM

Hi Project Manager1,
 Your resource plan is approved by Delivery Manager1, request you to please review the below information.
 Resource Plan ID: **RPLN0010188**
 Project Name: **Pri Proj may**
 Link : [Click here](#)
 Regards,
 PMO

15. Navigate back to service now application and click on back button and navigate to project detail screen:



16. Now click on Request Approval button present for the newly created project, once all detail of project is filled.



The screenshot shows the ServiceNow Project Manager interface for a project named "Pri Proj may". The "Request Approval" button in the top right toolbar is circled in red. The form contains various project details:

- Project Name:** Pri Proj may
- Project manager:** Project Manager1
- Other Project Managers:** Project Manager1
- Project Hour/Day:** 8
- Currency type:** USD
- Delivery Model:** -- None --
- Form Current Status:** Submission pending from Project Mgr.
- Work Progress:** PendingApproval
- Active:**
- Project Description:** testest
- Project ID:** PRJ0032941
- Billing Type / Model:** Fixed Bid / Milestone
- Billing Frequency:** Weekly
- Execution type / Dev Methodology:** Agile
- Project RAG Status:** Green
- Project Status:** Not Started
- Percent complete:** 0
- Phase:** Initiating

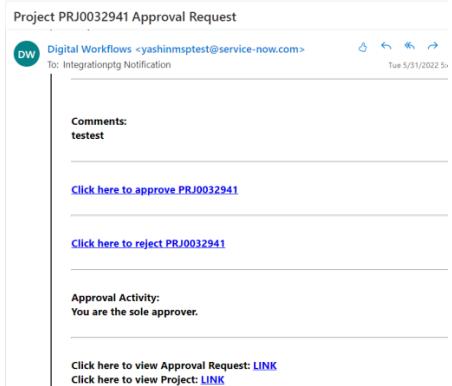
17. Below mail should be triggered to project manager, notifying that project is submitted for approval:

Project Submitted For Approval : PRJ0032941

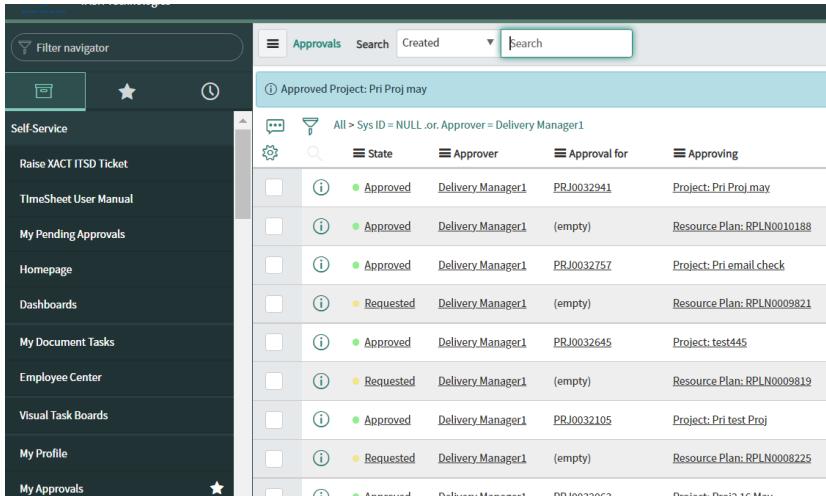
DW Digital Workflows <yashinmstest@service-now.com>
 To: Integrationptg Notification Tue 5/31/2022 5:44 PM

Hi Project Manager1,
 Your project has been submitted for approval.
 Click on the link below to complete the creation of the project.
 Project ID: **PRJ0032941**
 Project Name: **Pri Proj may**
 Project Link: [Click Here](#)
 Regards,
 PMO

18. Below Mail should be sent to delivery manager, for approving the project:



19. Now login as delivery manager and approve the requests by Navigating to **My approvals** and select the request and click on approve:



| | Approved | Approver | Approval for | Approving |
|--------------------------|-----------|-------------------|--------------|----------------------------|
| <input type="checkbox"/> | Approved | Delivery Manager1 | PRJ0032941 | Project: Pri Proj may |
| <input type="checkbox"/> | Approved | Delivery Manager1 | (empty) | Resource Plan: RPLN0010188 |
| <input type="checkbox"/> | Approved | Delivery Manager1 | PRJ0032757 | Project: Pri email check |
| <input type="checkbox"/> | Requested | Delivery Manager1 | (empty) | Resource Plan: RPLN0009821 |
| <input type="checkbox"/> | Approved | Delivery Manager1 | PRJ0032645 | Project: test445 |
| <input type="checkbox"/> | Requested | Delivery Manager1 | (empty) | Resource Plan: RPLN0009819 |
| <input type="checkbox"/> | Approved | Delivery Manager1 | PRJ0032105 | Project: Pri test Proj |
| <input type="checkbox"/> | Requested | Delivery Manager1 | (empty) | Resource Plan: RPLN0008225 |

20. Below email should be triggered to Project manager, after delivery manager approves the project.

Project PRJ0032941 Approved by Delivery Manager

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

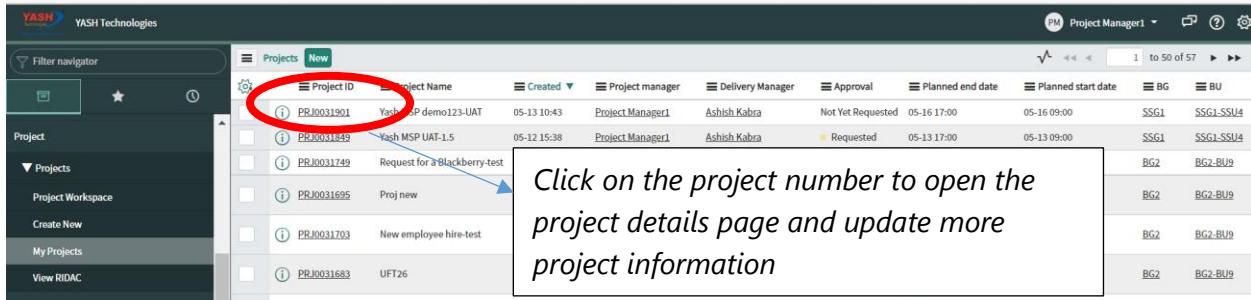
Tue 5/31/2022 5:44 PM

Hii Project Manager1,
Your project has been approved by Delivery Manager: Delivery Manager1

Click on the link below to complete the creation of the project.

Project ID: **PRJ0032941**
Project Name: **Pri Proj may**
Project Link: [Click Here](#)
Regards,
PMO

21. Login as Project manager again and navigate back to service now and click on **My Projects**. All newly created projects should be present in My Projects

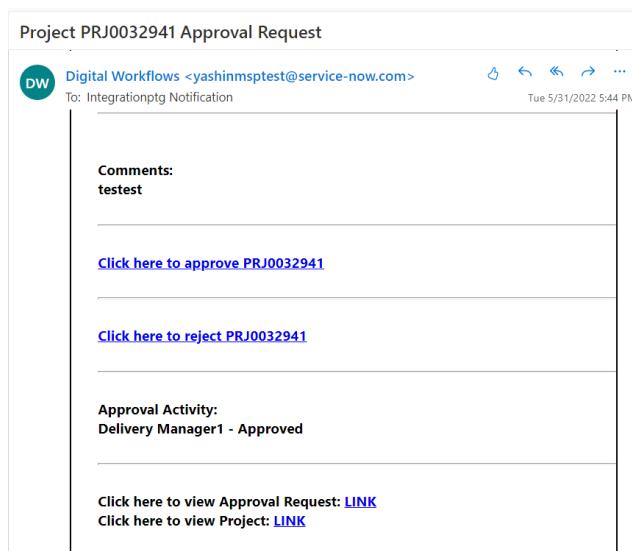


| Project ID | Project Name | Created | Project manager | Delivery Manager | Approval | Planned end date | Planned start date | BG | BU |
|------------|-------------------------------|-------------|------------------|------------------|-------------------|------------------|--------------------|------|-----------|
| PRJ0031901 | Yash-SP demo123-UAT | 05-13 10:43 | Project Manager1 | Ashish Kabra | Not Yet Requested | 05-16 09:00 | 05-16 09:00 | SSG1 | SSG1-SSU4 |
| PRJ0031649 | Yash MSP UAT-1.5 | 05-12 15:38 | Project Manager1 | Ashish Kabra | Requested | 05-13 17:00 | 05-13 09:00 | SSG1 | SSG1-SSU4 |
| PRJ0031749 | Request for a BlackBerry-test | | | | | | | BG2 | BG2-BU9 |
| PRJ0031695 | Proj new | | | | | | | BG2 | BG2-BU9 |
| PRJ0031703 | New employee hire-test | | | | | | | BG2 | BG2-BU9 |
| PRJ0031683 | UFT26 | | | | | | | BG2 | BG2-BU9 |

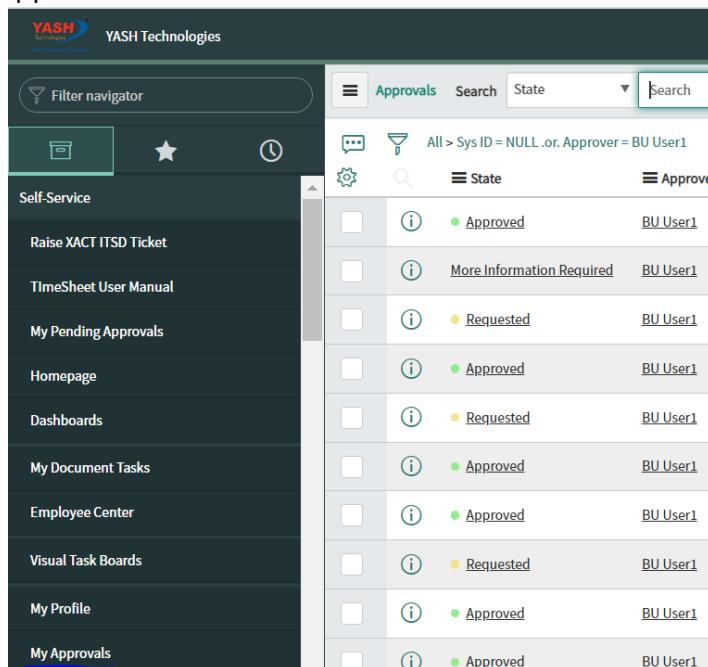
22. Click on the project and check the status of project.

| | |
|---------------------|-------------------------------------|
| Project Hour/Day | 8 |
| Currency type | USD |
| Delivery Model | -- None -- |
| Form Current Status | Approval pending from BUH |
| Work Progress | Pending Approval |
| Active | <input checked="" type="checkbox"/> |

23. Once project is approved by delivery manager then below email is sent to BUH to approve the new project:



24. Now login as BUH and navigate to My approval and select the project to open it. Click on approve button.



| | State | Approver |
|--------------------------|---------------------------|----------|
| <input type="checkbox"/> | Approved | BU User1 |
| <input type="checkbox"/> | More Information Required | BU User1 |
| <input type="checkbox"/> | Requested | BU User1 |
| <input type="checkbox"/> | Approved | BU User1 |
| <input type="checkbox"/> | Requested | BU User1 |
| <input type="checkbox"/> | Approved | BU User1 |
| <input type="checkbox"/> | Approved | BU User1 |
| <input type="checkbox"/> | Requested | BU User1 |
| <input type="checkbox"/> | Approved | BU User1 |
| <input type="checkbox"/> | Approved | BU User1 |

25. Below mail gets triggered to project manager, when project is approved by BUH:

Project PRJ0032941 Approved by BUH

DW Digital Workflows <yashinmsptest@service-now.com> Tue 5,

To: Integrationptg Notification

Hii Project Manager1,
Your project has been approved by BUH

.

Click on the link below to complete the creation of the project.

Project ID: **PRJ0032941**

Project Name: **Pri Proj may**

Project Link: [Click Here](#)

Regards,
PMO

26. Login as Project manager and open the newly created project and verify the form current status:

| | |
|---------------------|-------------------------------------|
| Currency type | USD |
| Delivery Model | -- None -- |
| Form Current Status | Approval pending from BGH |
| Work Progress | Pending Approval |
| Active | <input checked="" type="checkbox"/> |
| Project Description | testest |

27. Once BUH user approves project then request goes to BGH to approves the project:

Project PRJ0032941 Approval Request

DW Digital Workflows <yashinmsptest@service-now.com> Tue 5/31/2022 6:19 PM

To: Integrationptg Notification

Comments:
testest

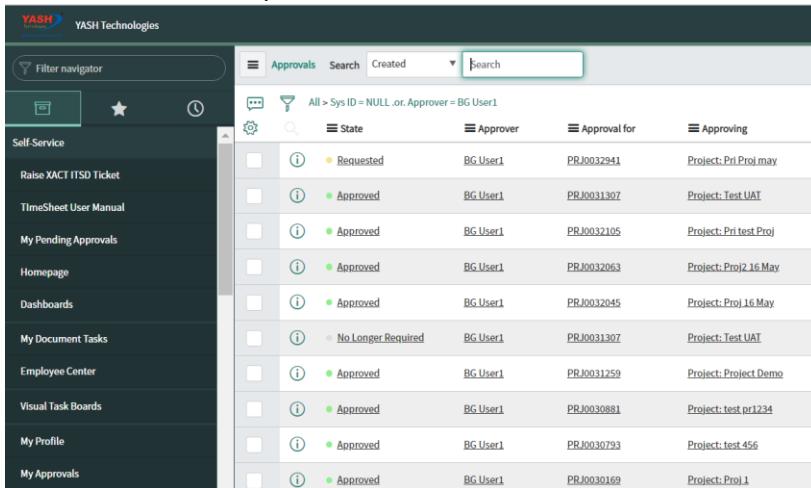
[Click here to approve PRJ0032941](#)

[Click here to reject PRJ0032941](#)

Approval Activity:
BU User1 - Approved
Delivery Manager1 - Approved

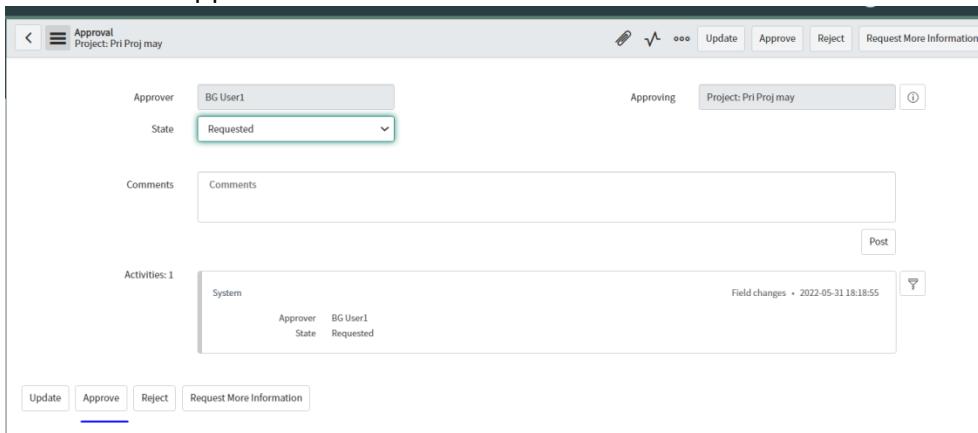
[Click here to view Approval Request: LINK](#)
[Click here to view Project: LINK](#)

28. Now login as BGH and navigate to My approvals and select the record present in requested status and click to open the record.



| | State | Approver | Approval for | Approving |
|--------------------------|--------------------|----------|--------------|------------------------|
| <input type="checkbox"/> | Requested | BG User1 | PRJ0032941 | Project: Pri Proj may |
| <input type="checkbox"/> | Approved | BG User1 | PRJ0031307 | Project: Test UAT |
| <input type="checkbox"/> | Approved | BG User1 | PRJ0032105 | Project: Pri test Proj |
| <input type="checkbox"/> | Approved | BG User1 | PRJ0032063 | Project: Proj2 16 May |
| <input type="checkbox"/> | Approved | BG User1 | PRJ0032045 | Project: Proj 16 May |
| <input type="checkbox"/> | No Longer Required | BG User1 | PRJ0031307 | Project: Test UAT |
| <input type="checkbox"/> | Approved | BG User1 | PRJ0031259 | Project: Project Demo |
| <input type="checkbox"/> | Approved | BG User1 | PRJ0030881 | Project: test pr1234 |
| <input type="checkbox"/> | Approved | BG User1 | PRJ0030793 | Project: test 456 |
| <input type="checkbox"/> | Approved | BG User1 | PRJ0030169 | Project: Proj 1 |

Now click on approve button.



The screenshot shows the approval details for a record. The approver is BG User1 and the state is Requested. There is a comments section and an activities log showing the approval was made by BG User1 on 2022-05-31 18:18:55.

29. Email notification is sent to project manager notifying of the approval done by BGH:

Project PRJ0032941 Approved by BGH

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

To: Integrationptg Notification

Hii Project Manager1,
Your project has been approved by BGH

Click on the link below to complete the creation of the project.
Project ID: PRJ0032941
Project Name: Pri Proj may
 Project Link: [Click Here](#)
 Regards,
 PMO

30. Login again as Project manager and verify the form status shown in portal:

| | |
|---------------------|-------------------------------------|
| Currency type | USD |
| Delivery Model | -- None -- |
| Form Current Status | Approval pending from Finance |
| Work Progress | Pending Approval |
| Active | <input checked="" type="checkbox"/> |
| Project Description | testest |

31. And then below email is sent to finance team to approve the new Project: -

Project PRJ0032941 Approval Request

DW Digital Workflows <yashinmsptest@service-now.com>    Tue 5/31/2

To: Integrationptg Notification

[Click here to approve PRJ0032941](#)

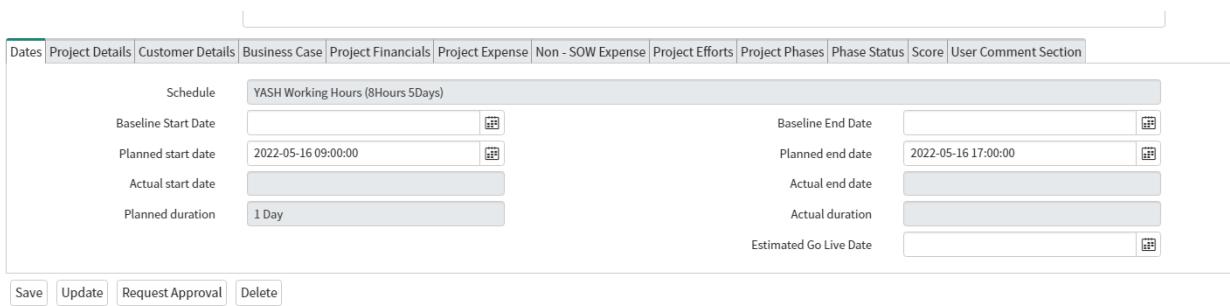
[Click here to reject PRJ0032941](#)

Approval Activity:
 Aayushi Tandon - Requested
 Akshay Ranade - Requested
 BG User1 - Approved
 BU User1 - Approved
 Chetan Salgiya - Requested
 Delivery Manager1 - Approved
 Prashant Singh - Requested
 Puneet Maheshwari - Requested
 Rajyavardhan Singh - Requested
 Saurabh Salgia - Requested

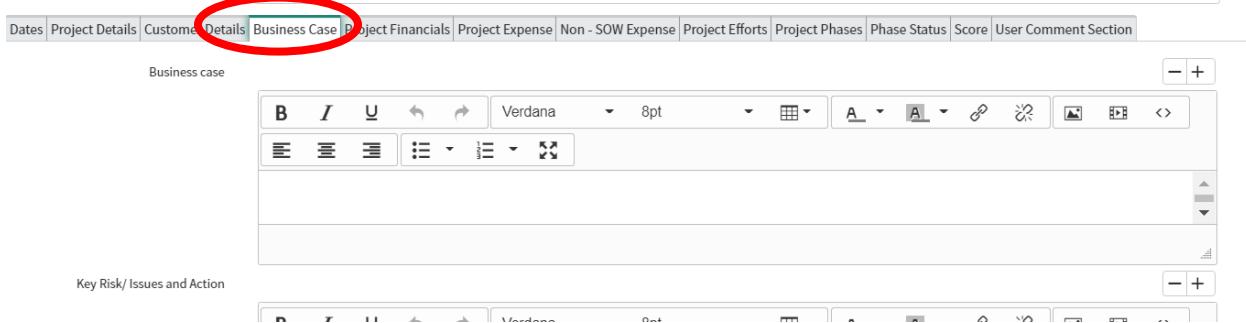
Updating/Adding Project Details:

- Click on any project id of newly created project and Verify/Update the basics of project details.

Scroll down to see other project information tabs and fill in information for Project Dates.



- Add details for Business Case :



- Verify project financial tab which should reflect data added in tabs like resource plans, expense lines etc.

| Dates | Project Details | Customer Details | Business Case | Project Financials | Project Expense | Non - SOW Expense | Project Efforts | Project Phases | Phase Status | Score | User Comment Section |
|-----------------------------|-----------------|---|---------------|--------------------|-----------------|-------------------|-----------------|-----------------------|--------------|----------------------------|----------------------|
| Total Project Planned Cost | \$900.00 | | | | | | | Total Actual cost | \$0.00 | | |
| | | Total Project plan cost is greater than Approved Cost | | | | | | Actual Resource Cost | \$0.00 | | |
| Total Resource Planned Cost | \$900.00 | | | | | | | Actual Expense | \$2,000.00 | | |
| Planned Expenses | \$1,000.00 | | | | | | | Total Non-Sow Expense | \$30,000.00 | | |
| SOW Value | \$0.00 | | | | | | | PO Number | | | |
| Planned Project Margin%(GM) | | | | | | | | SOW status | Not Approved | | |
| Approved Cost | \$0.00 | | | | | | | | | SOW status is Not Approved | |
| Approved Margin(GP) | \$0.00 | | | | | | | | | | |
| Total Demand Value | \$0.00 | | | | | | | | | | |
| Discount Details Notes | | | | | | | | | | | |

[Delete](#)

Below data added in expense lines:

| Resource Plans (1) WO/SOW Expense Lines (3) Project Tasks (1) Sub Projects Requirements Stories Status Reports Risks Actions Issues Decisions Stakeholders CBR Invoicings Vendors Resource Details (1) Time Cards (1) Sprints Releases Scrum Tasks Approvers (11) | | | | | | |
|---|------------|------------|-----------------|--------------------|------------------|---------------------------|
| Expense Lines | | New | Search | Expense ID | Search | |
| Task = Project Demo > Expense Type in (Planned, Actuals, Non SOW Expense, Resource Early Release) | | | | | | |
| <input type="checkbox"/> | Expense ID | ▲ | Expense Date | Expense Type | Expense Category | Expense Category(Non SOW) |
| <input type="checkbox"/> | EXP0011866 | 2022-05-13 | Planned | Billing Incentives | | \$1,000.00 short |
| <input type="checkbox"/> | EXP0011867 | 2022-05-13 | Actuals | Hardware Expense | | \$2,000.00 |
| <input type="checkbox"/> | EXP0011868 | 2022-05-13 | Non SOW Expense | Food | | \$30,000.00 |

Data added in resource plan:

| Resource Plans (1) WO/SOW Expense Lines (3) Project Tasks (1) Sub Projects Requirements Stories Status Reports Risks Actions Issues Decisions Stakeholders CBR Invoicings Vendors Resource Details (1) Time Cards (1) Sprints Releases Scrum Tasks Approvers (11) | | | | | | | |
|---|-----------------------------|--------------|------------|------------|-----------------|---------------|-----------------------|
| Resource Plans | | Manage | New | Search | Created | Search | |
| Resource Plans | | | | | | | |
| <input checked="" type="checkbox"/> | Resource Competency Manager | Members List | Start Date | End Date | Approval Status | Planned Hours | Resource Planned Cost |
| | Prakash Manapilly | | 2022-05-11 | 2022-05-11 | Approved | 90 | \$900.00 Allocated |
| | | | | | | Sum | 90 Sum |
| | | | | | | | \$900.00 |

4. Verify the project expense detail:

[Dates](#) [Project Details](#) [Customer Details](#) [Business Case](#) [Project Financials](#) [Project Expense](#) [Non - SOW Expense](#) [Project Efforts](#) [Project Phases](#) [Phase Status](#) [Score](#) [User Comment Section](#)

| | | | |
|-----------------------|------------|---------------------|------------|
| Baseline Cost | \$0.00 | Project Cost Centre | |
| Project Profit Center | | Investment Center | |
| Revenue Center | | Payment Terms | |
| Planned Cost | | Actual Cost | |
| Planned Expenses | \$1,000.00 | Actual Expenses | \$2,000.00 |

[Delete](#)

5. Verify Non-SOW Expense Details (*This section will be editable only after project approval*)

[Dates](#) [Project Details](#) [Customer Details](#) [Business Case](#) [Project Financials](#) [Project Expense](#) [Non - SOW Expense](#) [Project Efforts](#) [Project Phases](#) [Phase Status](#) [Score](#) [User Comment Section](#)

| | |
|-----------------------------|------------|
| Total Non Sow Expense Costs | \$2,000.00 |
|-----------------------------|------------|

[Delete](#)

Related Links

- [Calculate Completion Estimates](#)
- [Create Agile Phase](#)
- [Create Test Phase](#)
- [Planning Console](#)
- [View RIDAC](#)
- [Project Workbench](#)
- [Status Report](#)
- [Create Baseline](#)

[Resource Plans \(1\)](#) [WO/SOW](#) [Expense Lines \(3\)](#) [Project Tasks](#) [Sub Projects](#) [Requirements](#) [Status Reports](#) [Risks](#) [Actions](#) [Issues](#) [Decisions](#) [Stakeholders](#) [CBR Invoicings](#) [Vendors](#) [Resource Details \(1\)](#) [Time Cards](#) [Approvers \(1\)](#)

| Expense ID | Expense Date | Expense Type | Expense Category | Expense Category(Non SOW) | Amount | Short description |
|------------|--------------|-----------------|--------------------|---------------------------|------------|-------------------|
| EXP0011863 | 2022-05-13 | Planned | Accommodation | | \$1,000.00 | test |
| EXP0011864 | 2022-05-13 | Actual | Billing Incentives | | \$1,000.00 | test |
| EXP0011865 | 2022-05-13 | Non SOW Expense | Miscellaneous | | \$2,000.00 | |

6. Add details for Project Efforts

servicenow Service Management

[Project Manager](#)

[Project](#) [Tharun, Test](#)

[Project Efforts](#) [Project Phases](#)

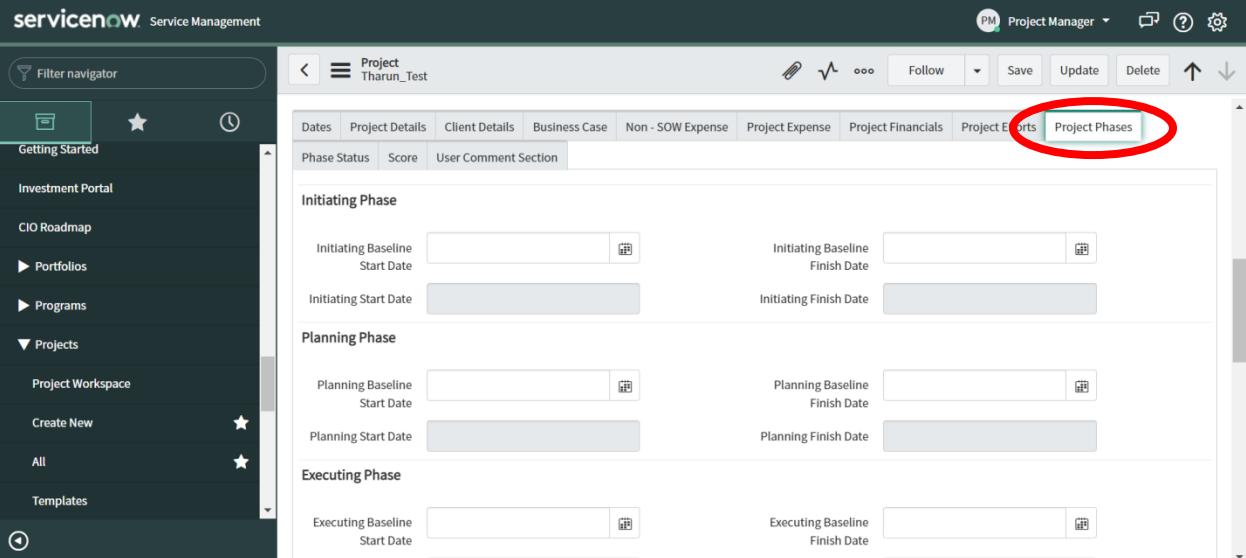
| | | | |
|-----------------------|----------|----------------|----------------|
| Baseline Effort | Days: 00 | Planned effort | Hours: 0 00 00 |
| Actual Effort(In Hrs) | 0 | | |

[Save](#) [Update](#) [Delete](#)

Related Links

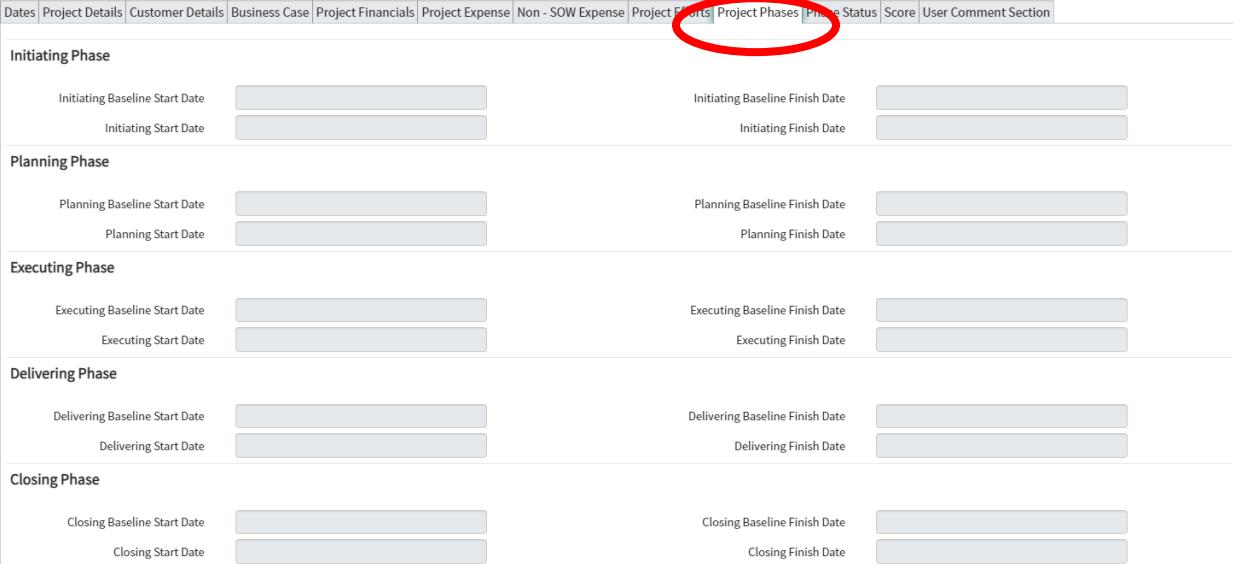
- [Calculate Completion Estimates](#)
- [Planning Console](#)
- [View RIDAC](#)
- [Project Workbench](#)
- [Status Report](#)
- [Create Baseline](#)

7. Add details of Project Phases.



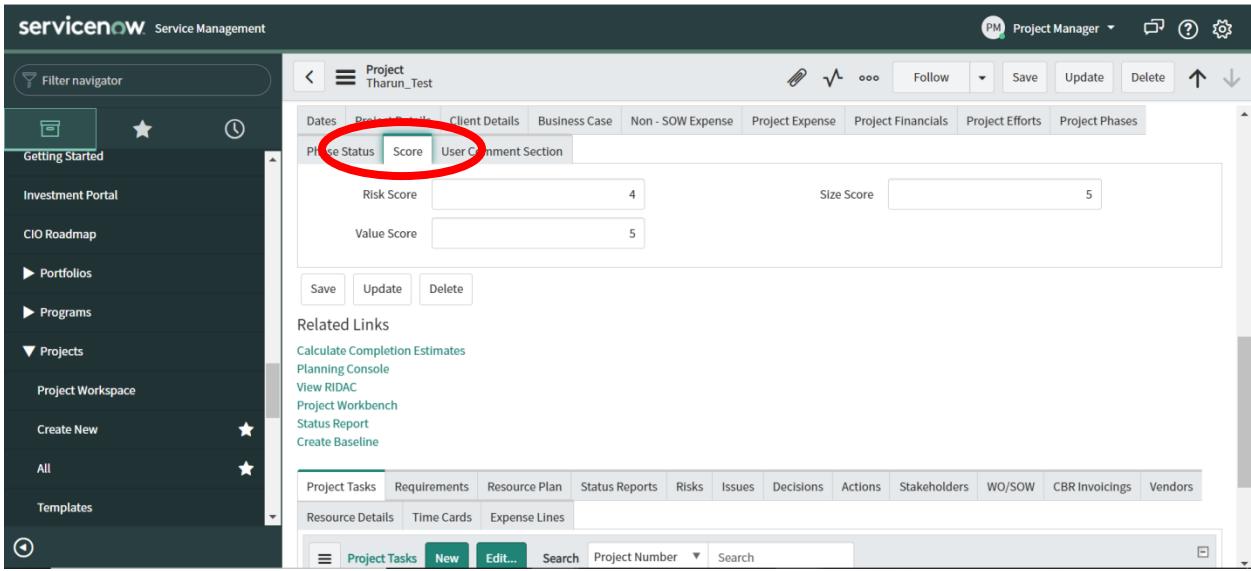
The screenshot shows the ServiceNow Project Management interface for a project named "Project_Tharun_Test". The "Project Phases" tab is highlighted with a red circle. The interface includes a left sidebar with navigation links like "Getting Started", "Investment Portal", "CIO Roadmap", "Portfolios", "Programs", "Projects", "Create New", "All", and "Templates". The main panel displays sections for "Initiating Phase", "Planning Phase", "Executing Phase", and "Delivering Phase", each with start and finish date fields.

8. Click on Phase Status tab to view status information. Delivery manager should be able to change the phases.



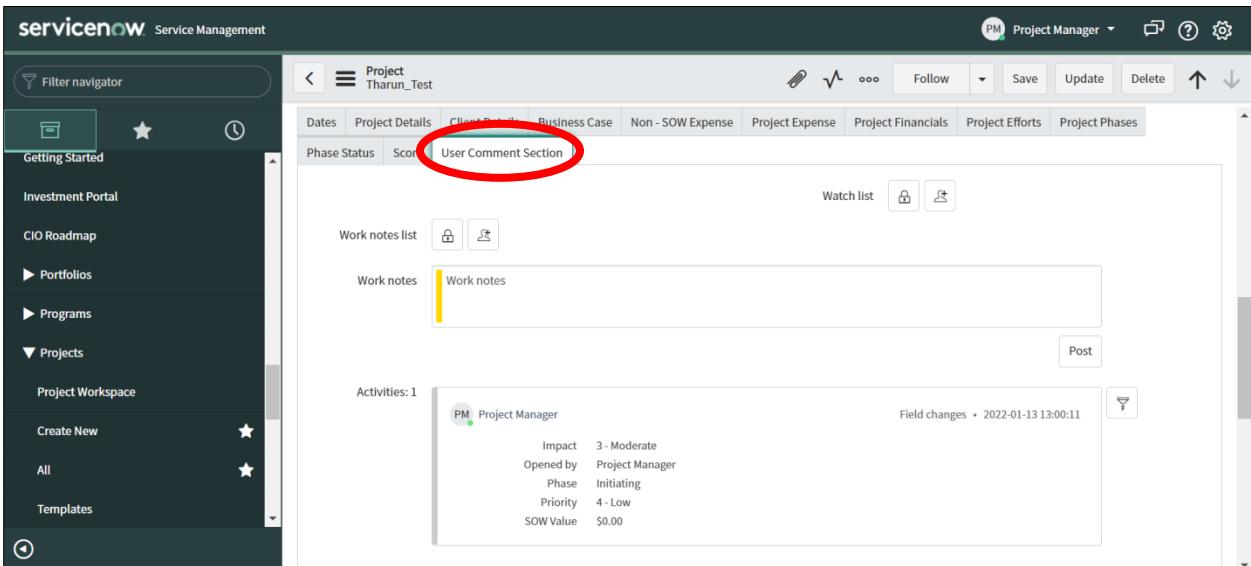
This screenshot shows the "Project Phases" tab from the previous interface. The "Phase Status" section is highlighted with a red circle. It contains tabs for "Phase Status", "Score", and "User Comment Section". Below these tabs, there are sections for "Initiating Phase", "Planning Phase", "Executing Phase", "Delivering Phase", and "Closing Phase", each with start and finish date fields.

9. Add Score details



The screenshot shows the ServiceNow Project Management interface for a project named "Tharun_Test". The left sidebar includes links like Getting Started, Investment Portal, CIO Roadmap, Portfolios, Programs, Projects, Project Workspace, Create New, All, and Templates. The main area has a ribbon with tabs: Dates, Project Details, Client Details, Business Case, Non - SOW Expense, Project Expense, Project Financials, Project Efforts, and Project Phases. The "Score" tab is highlighted with a red circle. Below the ribbon, there are fields for Risk Score (4) and Value Score (5). At the bottom are Save, Update, and Delete buttons.

10. Add Comments in user comment section



The screenshot shows the same ServiceNow Project Management interface for the "Tharun_Test" project. The left sidebar and ribbon are identical to the previous screenshot. The "User Comment Section" tab is highlighted with a red circle. Below the ribbon, there is a "Work notes list" section with icons for lock and unlock, and a "Work notes" section with a text input field and a "Post" button. At the bottom, there is a "Activities: 1" section showing a single activity entry for a "Project Manager" with details: Impact 3 - Moderate, Opened by Project Manager, Phase Initiating, Priority 4 - Low, and SOW Value \$0.00. A note indicates "Field changes • 2022-01-13 13:00:11".

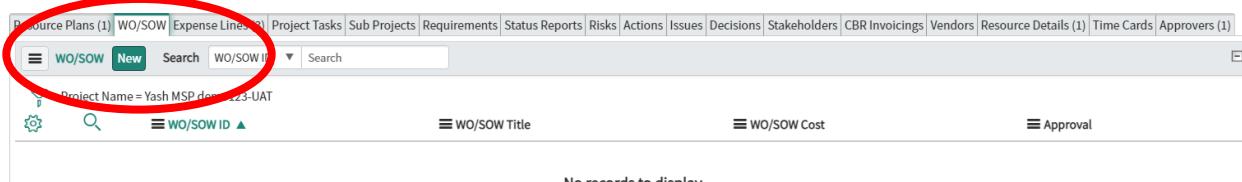
11. Scroll to add the information listed below in the respective tabs

- a. Resource Plan
- b. WO/SOW
- c. Expense Lines
- d. Project Tasks
- e. Sub-Projects
- f. Requirements
- g. Status Reports
- h. Risks
- i. Actions
- j. Issues
- k. Decisions
- l. Stakeholders
- m. CBR Invoicing
- n. Vendors
- o. Resource Details
- p. Timecards
- q. Approvers

| Resource Plans (1) WO/SOW Expense Lines (3) Project Tasks Sub Projects Requirements Status Reports Risks Actions Issues Decisions Stakeholders CBR Invoicings Vendors Resource Details (1) Time Cards Approvers (1) | | | | | | | | | | | |
|--|------------|---------|-------------|---------|--|------------|------------|--------------------------|--|--|--|
| Resource Plans Manage New Search Created ▼ Search ◀◀ ◀ ▶ ▶▶ ⌂ 1 to 1 of 1 | | | | | | | | | | | |
| Number Parent Competency Type Employee Name Resource Competency Manager Members List Start Date End Date Approval Status Pla | | | | | | | | | | | |
| RPLN0008066 | PRJ0031901 | (empty) | Aakash Jain | (empty) | | 2022-05-16 | 2022-05-31 | Approval Pending From DM | | | |
| Sum | | | | | | | | | | | |
| Actions on selected rows... ▾ | | | | | | | | | | | |

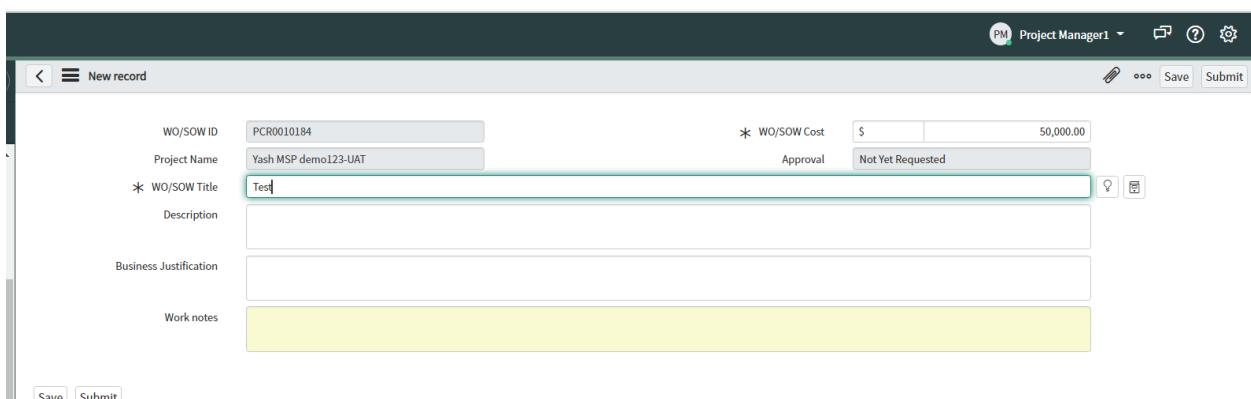
How to Create WO/SOW for the Project:

1. Navigate to WO/SOW and click on New



A screenshot of a software interface showing a list of WO/SOW records. At the top, there is a navigation bar with various links like 'Source Plans (1)', 'WO/SOW', 'Expense Lines (1)', etc. Below the navigation bar is a search bar. A red circle highlights the 'New' button, which is located next to the search bar. The main area shows a single record with the text 'Project Name = Yash MSP demo123-UAT'. Below the record are several columns: 'WO/SOW ID', 'WO/SOW Title', 'WO/SOW Cost', and 'Approval'. A message at the bottom says 'No records to display'.

2. Enter all mandatory details and click on Submit:



A screenshot of a 'New record' form for WO/SOW. The form has several fields:

- WO/SOW ID: PCR0010184
- Project Name: Yash MSP demo123-UAT
- * WO/SOW Title: Test
- Description: (empty)
- Business Justification: (empty)
- Work notes: (yellow highlighted area)
- WO/SOW Cost: \$ 50,000.00
- Approval: Not Yet Requested

 At the bottom of the form are 'Save' and 'Submit' buttons.

3. Notification should be sent to delivery manager and Project manager:

SOW submitted for approval: PRJ0031901

DW Digital Workflows <yashinmsptest@service-now.com> Fri 5/13/2022 7:03 PM To: Integrationptg Notification

Hi Ashish Kabra,

The SOW for the project mentioned below has been submitted and is pending for your approval, Click on the link below to view the details.

Project ID: PRJ0031901

Project Name: Yash MSP demo123-UAT

Project Link: [Click Here](#)

Regards,

PMO

Below notification should be sent to project manager:

SOW (PCR0010184) submitted for approval

DW Digital Workflows <yashinmsptest@service-now.com> Fri 5/13/2022 7:03 PM To: Integrationptg Notification

Hi Project Manager1,

The SOW for the project mentioned below has been submitted.

SOW ID: PCR0010184

Project ID: PRJ0031901

Project Name: Yash MSP demo123-UAT

Project Link: [Click Here](#)

Regards,

PMO

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

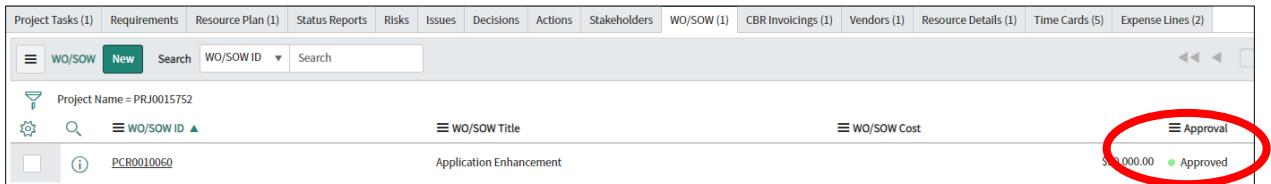
Ref:MSG0171176_UbzBxpZtnJlKsGxeNGVI

Are the suggestions above helpful? Yes No

4. Navigate to Project detail screen and verify the WO/SOW status, It should show as Requested:

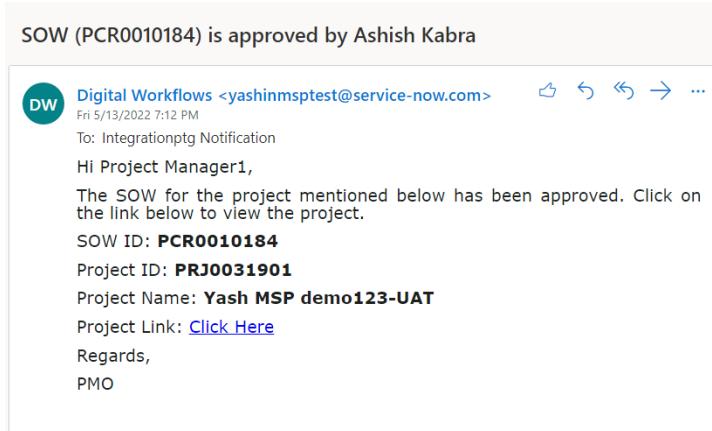
| Resource Plans (1) | WO/SOW (1) | Expense Lines (3) | Project Tasks | Sub Projects | Requirements | Status Reports | Risks | Actions | Issues | Decisions | Stakeholders | CBR Invoicings | Vendors | Resource Details (1) | Time Cards | Approvers (1) |
|--|-------------------|--------------------|---------------|---------------------|--------------|--------------------|-------|-----------------|--------|-----------|--------------|----------------|---------|----------------------|------------|---------------|
| | WO/SOW New | Search | WO/SOW ID | Search | | | | | | | | | | | | |
| <input type="button" value="«"/> <input type="button" value="»"/> <input type="button" value="1"/> to 1 of 1 <input type="button" value=">"/> <input type="button" value=">>"/> | | | | | | | | | | | | | | | | |
| Project Name = Yash MSP demo123-UAT | | WO/SOW ID ▲ | | WO/SOW Title | | WO/SOW Cost | | Approval | | | | | | | | |
| <input type="checkbox"/> | PCR0010184 | Test | | | | \$50,000.00 | | Requested | | | | | | | | |

5. Now Login as Delivery manager and approve the WO/SOW. Approval status should get changed to approved:-



The screenshot shows a project management interface with a header containing various tabs like Project Tasks, Requirements, Resource Plan, Status Reports, Risks, Issues, Decisions, Actions, Stakeholders, WO/SOW, CBR Invoicings, Vendors, Resource Details, Time Cards, and Expense Lines. Below the header, there's a search bar and a table with columns for Project Name, WO/SOW ID, WO/SOW Title, WO/SOW Cost, and Approval. A row for 'PCR0010060' is selected, and the 'Approval' column shows '\$0.000.00' and 'Approved' with a green checkmark. The 'Approved' status is circled in red.

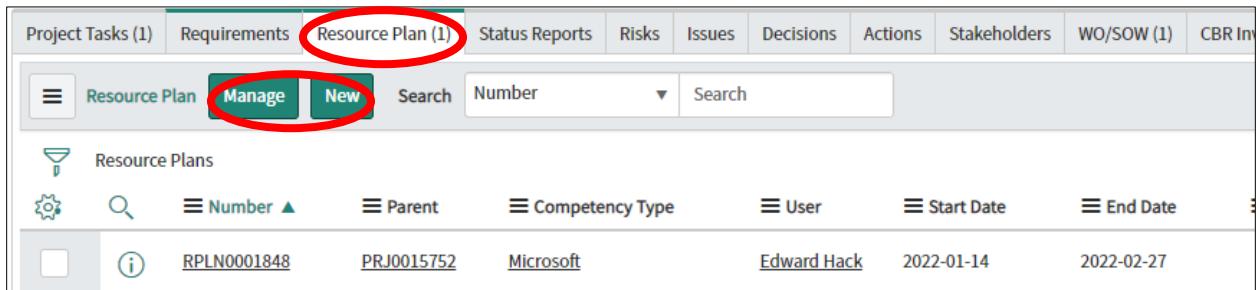
6. Verify the email triggered to project manager when WO/SOW is approved (*email content will get updated shortly*)



The email subject is 'SOW (PCR0010184) is approved by Ashish Kabra'. The message body starts with a digital workflow icon and the date 'Fri 5/13/2022 7:12 PM'. It says 'To: Integrationptg Notification' and 'Hi Project Manager1,'. It informs the recipient that the SOW for the project has been approved and provides details: SOW ID: PCR0010184, Project ID: PRJ0031901, Project Name: Yash MSP demo123-UAT, and a Project Link: [Click Here](#). The message concludes with 'Regards,' and 'PMO'.

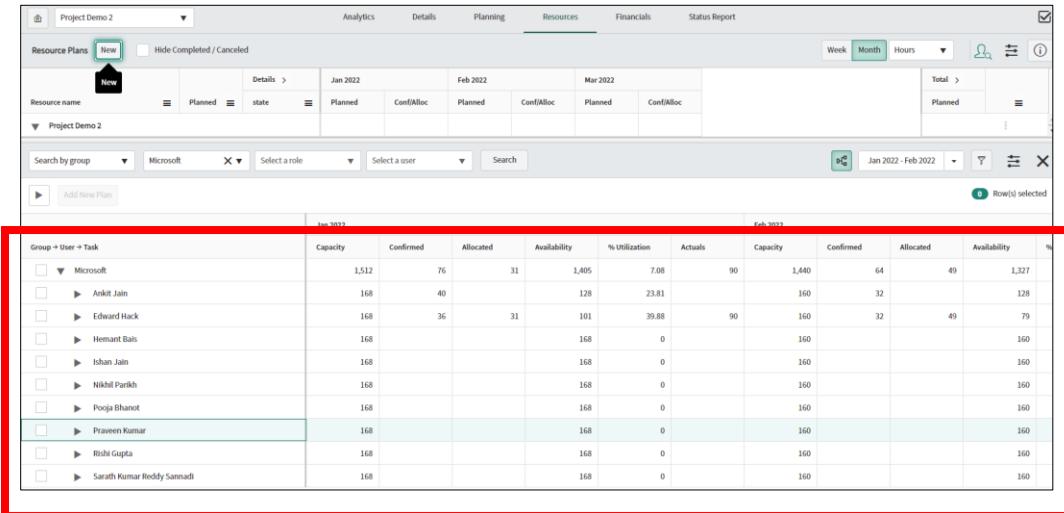
Way to Create Resource Plan using manage button

1. In Resource plan section click on New for the new plan, or click on Manage to review the existing resource allocation/availability details



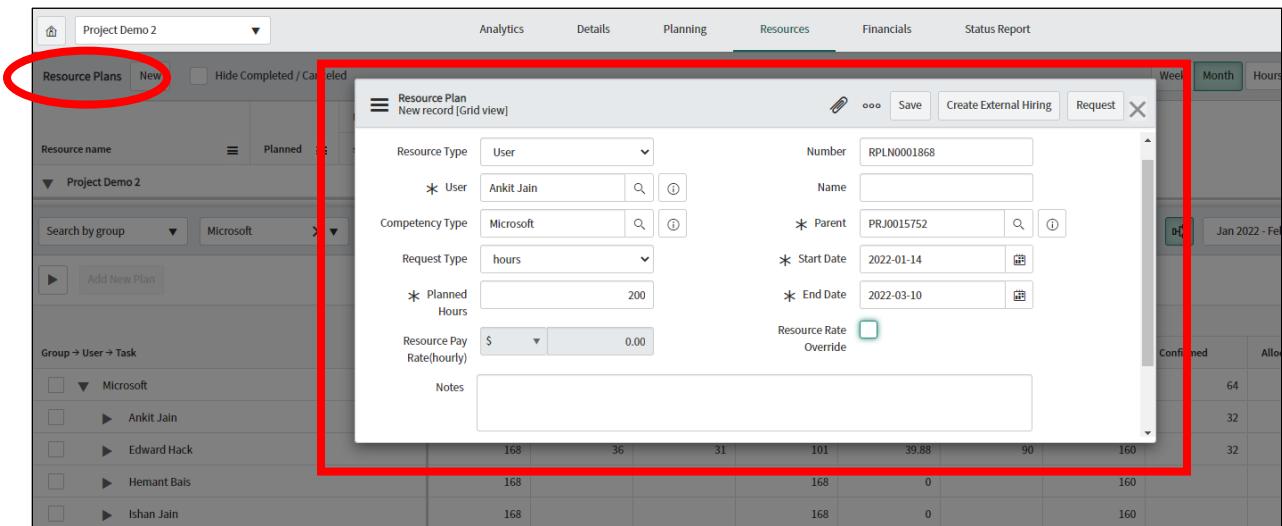
The screenshot shows a navigation bar with tabs: Project Tasks (1), Requirements, Resource Plan (1), Status Reports, Risks, Issues, Decisions, Actions, Stakeholders, WO/SOW (1), and CBR Inv. Below the tabs is a toolbar with icons for Resource Plan, Manage (highlighted with a red circle), and New. A search bar is also present. The main area displays a table titled 'Resource Plans' with columns: Number, Parent, Competency Type, User, Start Date, and End Date. One row is visible: RPLN0001848, PRJ0015752, Microsoft, Edward Hack, 2022-01-14, 2022-02-27.

2. Click on Manage Icon as per previous screen shot you will be navigated to Resource details page where you can review the resource allocation details. After review click on the New Icon to create new Resource plan.



The screenshot shows a 'Resource Plans' section with a 'New' button highlighted with a red circle. Below it is a table for 'Project Demo 2' showing resource utilization from Jan 2022 to Mar 2022. The table has columns for Resource name, Planned, state, and various metrics like Capacity, Confirmed, Allocated, Availability, %Utilization, Actuals, and more. A specific row for 'Microsoft' is highlighted with a red box, showing details for users like Ankit Jain, Edward Hack, Hemant Bais, etc.

3. Once the New Resource plan is submitted it will be sent to the respective CM for resource confirmation and allocation.



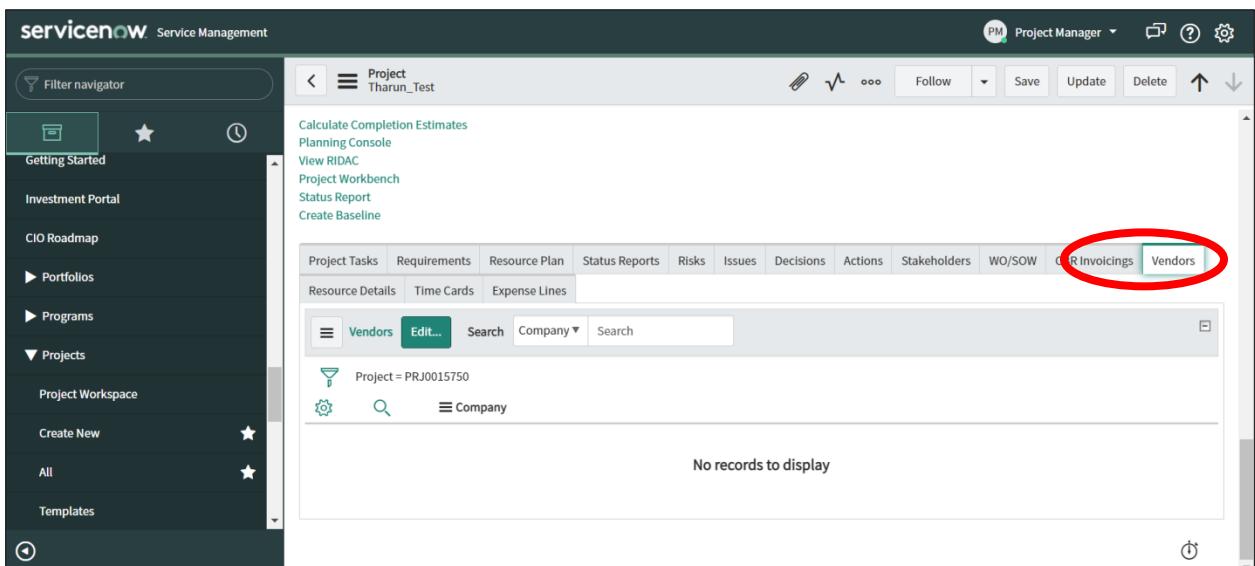
Project Demo 2

Analytics Details Planning Resources Financials Status Report

Resource Plans New Hide Completed / Canceled

Resource Plan
New record [Grid view]

| Resource Type | User | Number | RPLN0001868 | | | |
|---------------------------|------------|------------------------|-------------|-------|-----|-----|
| User | Ankit Jain | Name | | | | |
| Competency Type | Microsoft | Parent | PRJ0015752 | | | |
| Request Type | hours | Start Date | 2022-01-14 | | | |
| Planned Hours | 200 | End Date | 2022-03-10 | | | |
| Resource Pay Rate(hourly) | \$ 0.00 | Resource Rate Override | | | | |
| Notes | | | | | | |
| 168 | 36 | 31 | 101 | 39.88 | 90 | 160 |
| 168 | | 168 | 0 | | 160 | |
| | | 168 | 0 | | | 160 |



servicenow Service Management

Project Tharun_Test

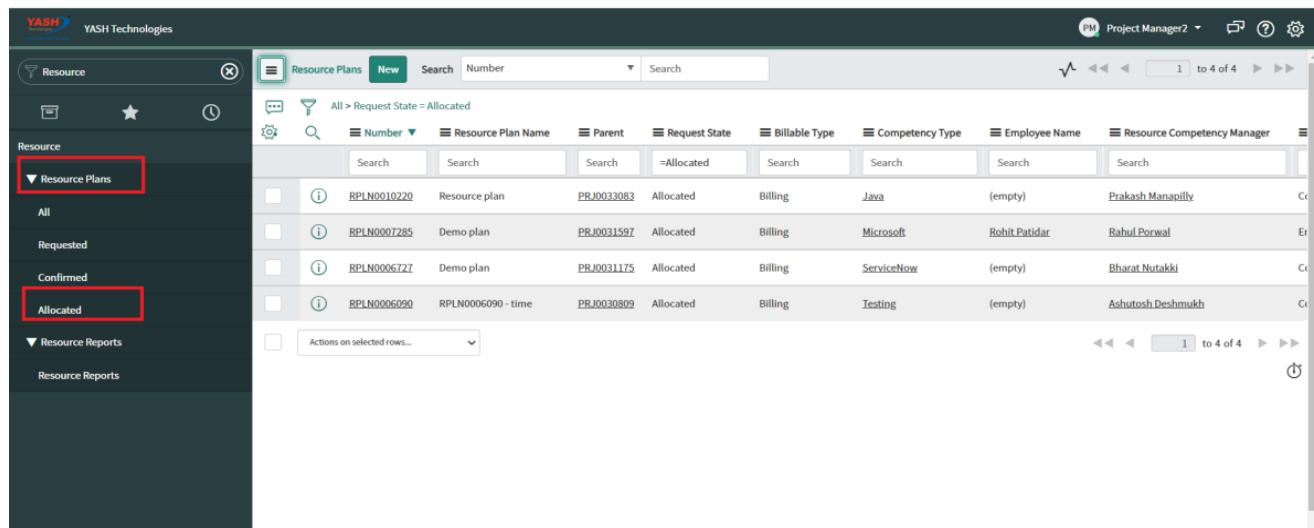
Calculate Completion Estimates
Planning Console
View RIDAC
Project Workbench
Status Report
Create Baseline

Project Tasks Requirements Resource Plan Status Reports Risks Issues Decisions Actions Stakeholders WO/SOW QR Invoicings **Vendors**

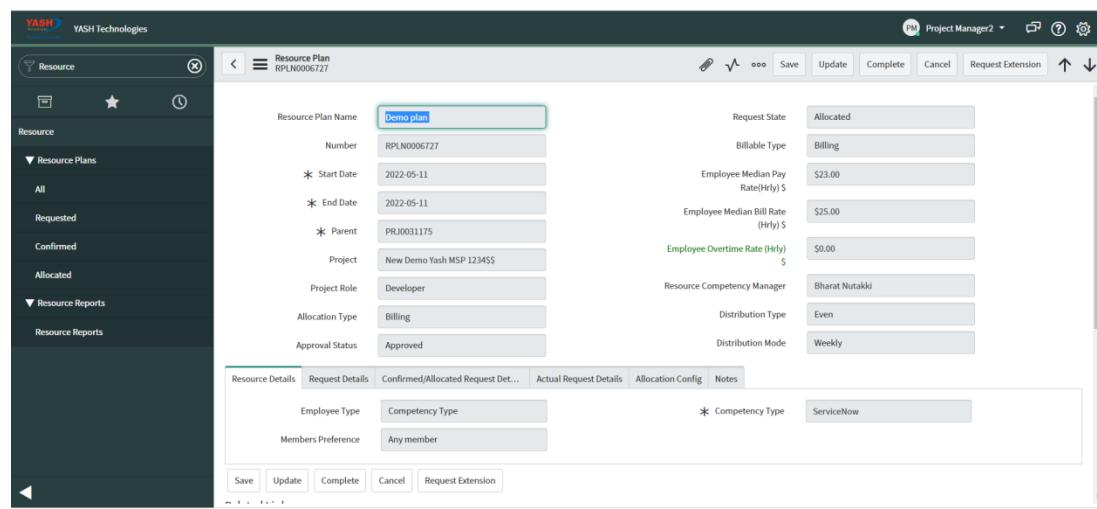
No records to display

Resource Release Process: -

1. Project Manager can release his allocated resource as per requirement of project duration.
2. For releasing the allocated resource from Project can Navigate to Resource Plans > Click on Allocated module

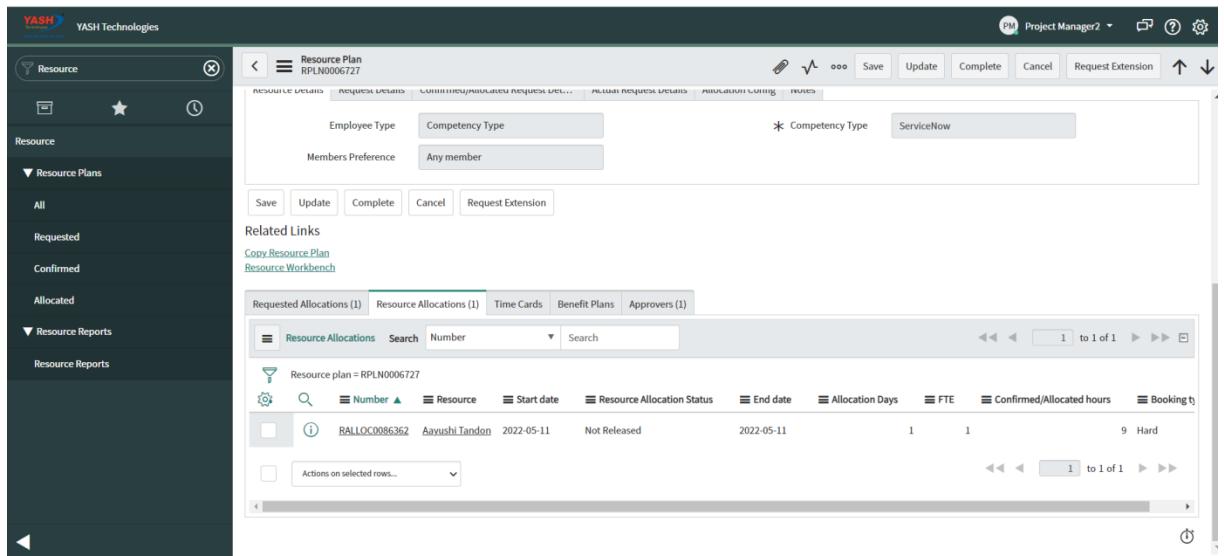


3. Verify the Project Name from list of resource plan and opening the record.



4. Scroll down into the form and go through the related tab > Click on Resource

Allocations > verify the Resource record.

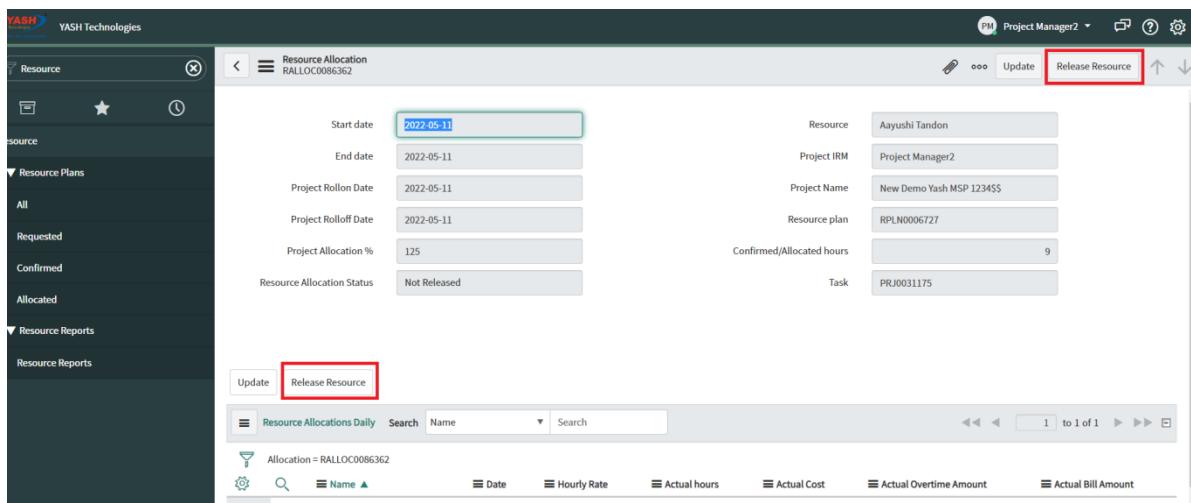


The screenshot shows the 'Resource Plan' screen with the following details:

- Employee Type:** Competency Type
- Members Preference:** Any member
- Competency Type:** ServiceNow
- Allocation Details:** Allocation ID: RPLN0006727, Start Date: 2022-05-11, End Date: 2022-05-11, Allocation Days: 1, FTE: 1, Confirmed/Allocated hours: 9, Booking type: Hard
- Resource Allocation Grid:**

| Number | Resource | Start date | Resource Allocation Status | End date | Allocation Days | FTE | Confirmed/Allocated hours | Booking type |
|---------------|----------------|------------|----------------------------|------------|-----------------|-----|---------------------------|--------------|
| RALLOC0086362 | Aayushi Tandon | 2022-05-11 | Not Released | 2022-05-11 | 1 | 1 | 9 | Hard |

- Opening the Record of Resource Plan > Verify the Resource Release UI Action > Click on the Button



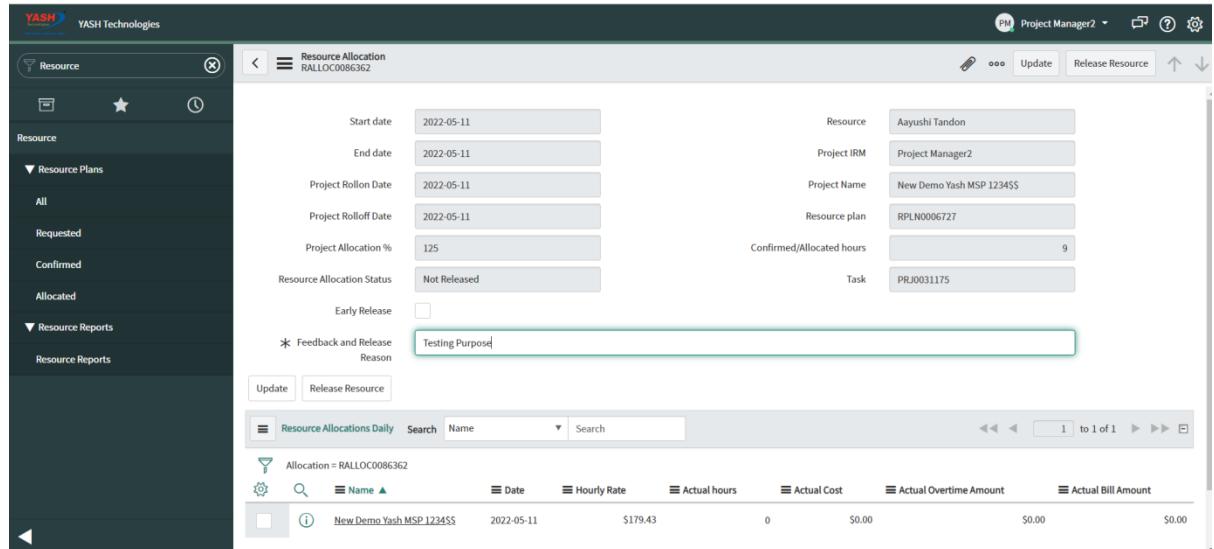
The screenshot shows the 'Resource Allocation' screen with the following details:

- Allocation Details:** Start date: 2022-05-11, End date: 2022-05-11, Project Rollon Date: 2022-05-11, Project Rolloff Date: 2022-05-11, Project Allocation %: 125, Resource Allocation Status: Not Released
- Allocation Grid:**

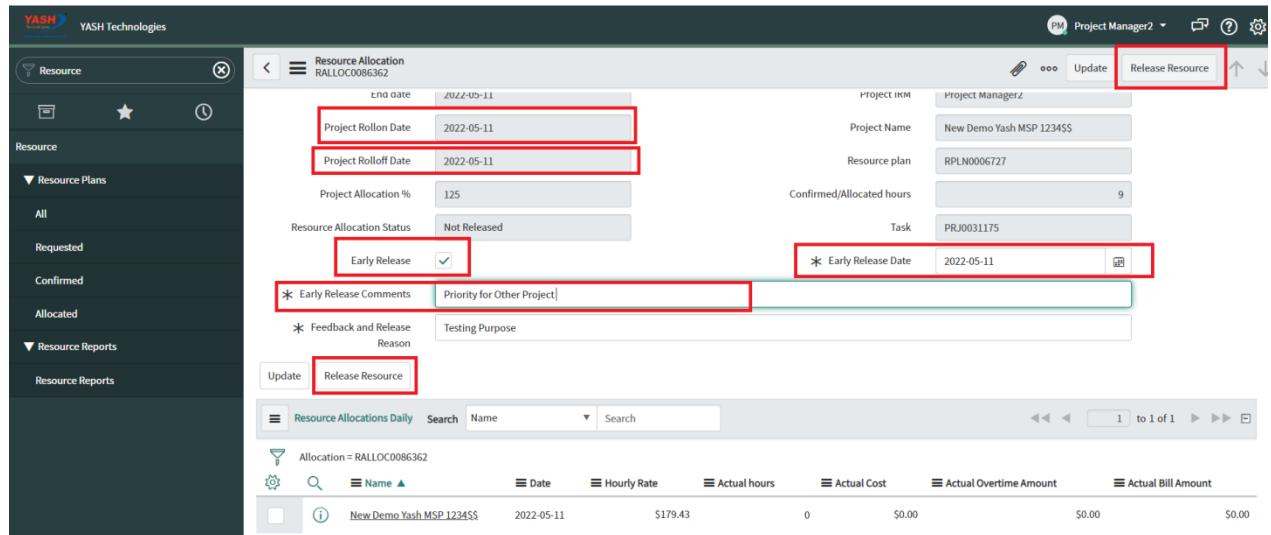
| Name | Date | Hourly Rate | Actual hours | Actual Cost | Actual Overtime Amount | Actual Bill Amount |
|----------------|------------|-------------|--------------|-------------|------------------------|--------------------|
| Aayushi Tandon | 2022-05-11 | | | | | |
- Buttons:** Update, Release Resource (highlighted with a red box)

- After Clicking on Resource Release button User need to give feedback and Release

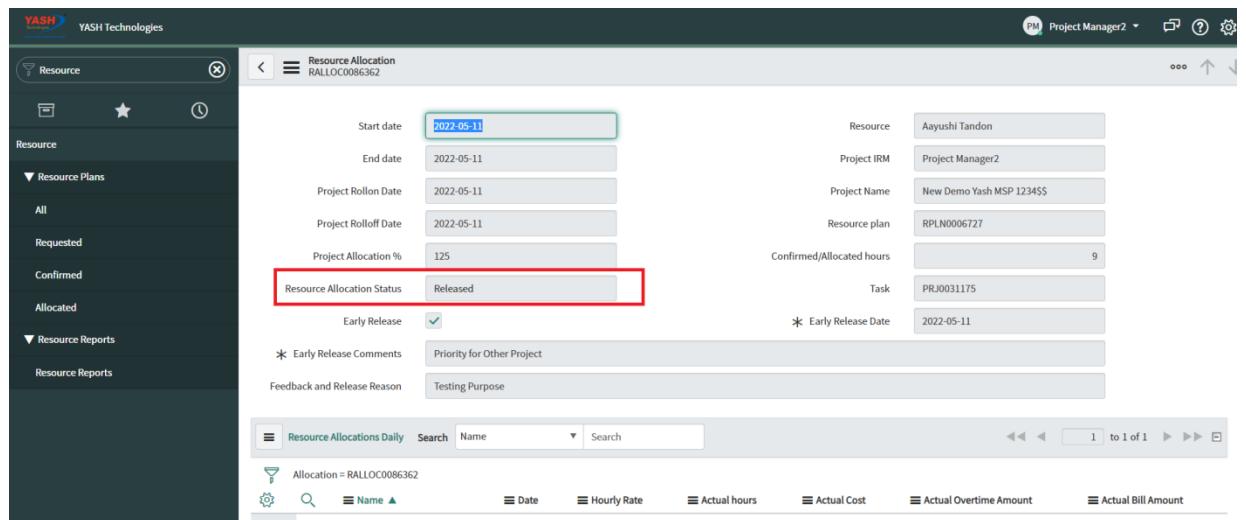
reason and Click on Resource Release button.



7. If Resource need to release early from project then user can Click on Check box of Early release > Select the Early Release date which should be the duration date in between the Project Roll on date & Project Roll off Date. Also need to provide the Early Release Comments into the text field.



8. After Releasing the resource user can see the below status into the resource allocation form view.



9. After Releasing resource from project Email will trigger for release resource.



Resource Plan is Released for Project: PRJ001xxx

 IT Service Desk <yashinmsp@service-now.com>
To Ramesh

If there are problems with how this message is displayed, click here to view it in a web browser.

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hi Ramesh ,
Resource is release from the project against the resource plan and below are the details.
Resource Plan ID: XXX1000
Project Name: XXXXX
Link : [Click Here](#)
Regards,
XACT

[Unsubscribe](#) | [Notification Preferences](#)
Ref:MSG0741887_pXWgsaxc2swUS1R8vlls

Questions & Answers:

Q1: When project is created for other project manager so in this case, will different project manager has any authority of the project created for other manager?

Answer- No. To have access of project, user should be delivery manager or in the additional project manager list.

Q2: What happens when employees project is changed but in the timesheet portal it is showing the same old project task?

Answer- In this case the new project manager should be responsible to assign a new project task to the resource.

Q3: If PM has created a project and it is sent to delivery manager for approval but DM is on long leave then who will approve it?

Answer- As per current functionality, project approval will stay with assigned DM only, and PM need to get it approved.

Q4: How billing adjustment works if client working hours are less or if there is any client holiday for a particular day.

Answer- There is a separate Billing Adjustment functionality for that, where PM and adjust resource submitted timesheet as per the client working hours.

Q5: Why by default status of SOW is displayed as "SOW Status is not approved" what does that mean?

Answer- If your project is billable, the above message will appear unit you upload SOW in the system, if your project is non-billable, then this message will not appear.

Q6: How are expense lines calculated?

Answer- There is a section where you can add planned and actual expenses and total data will roll up and reflect in "Project Financials"

Q8: How does execution type effects the billing cycle, resource plan creation and filling the timesheet?

Answer- Executing type will affect only CBRs, and there is no impact on billing cycle, resource plan and timesheet.

Q9: What if customer details are not present in the search field of customer details? Can we add the new details?

Answer- Select others as a value and provide the new client's name, it will go to legal team to validate the client details, after validation they will add the client in the system, and you will be notified.

Q10: What is phase status?

Answer- Each development projects will have their phases and project moves according to the phases. Operations project will not have any phases, please select exempt for the same. If PM select execution type as agile, Sprint section will be enabled.

Q11: What CBR invoicing?

Answer- CBR means, date for billing/invoicing to customer. It is the same process what we are doing in YASH for billing purpose. We are automating the process and added the approval workflows from Excel to Tool.

Q12: Does Project Hour/Day effect filling timesheet for example if we select 7.5 hours or 8 hours as project hour then?

Answer- Timesheet can be filled with 9 hours and then project manager can adjust the billing hours with respect to the project hour

Q14: What are Non-SOW Expenses?

Answer- which are incurred in your project but not mentioned in the SOW, which needs to be get approved by client.

Q15: What are Expense Lines?

Answer- There is a section where you can add planned and actual expense and total data will roll up and reflect in "Project Financials".

Q16: On creating the new project email reminder will be sent to whom?

Answer- Email reminder will be sent to the respective DM for the approval and after DM approval it will sent to BU and BGH approvals.