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User Manual

Project Management

Powered By – Service Now

Created By – XACT Product Team

Document Control

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Division Name	YASH Next
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Next Review Date	

Change Record

Modified Date	Author	Version	Description of change
08-06-2022	XACT Product Team	V-1.1	Added Resource release Process

Contents

XACT Project Management ~ User Manual

Purpose:

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

Scope:

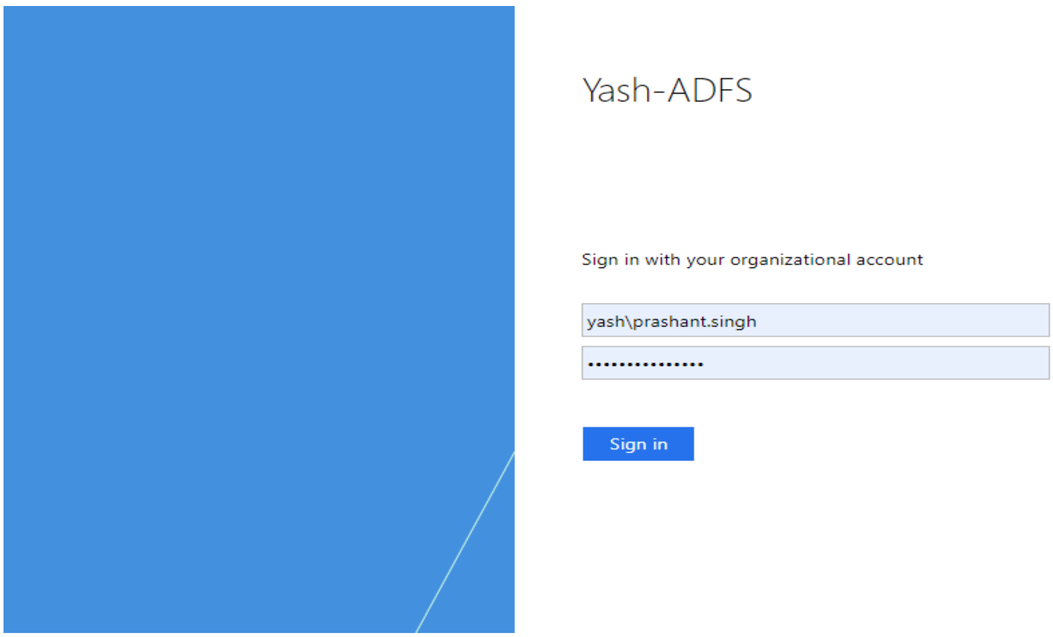
This document contains the steps to create a project and update details on service now.

Roles:

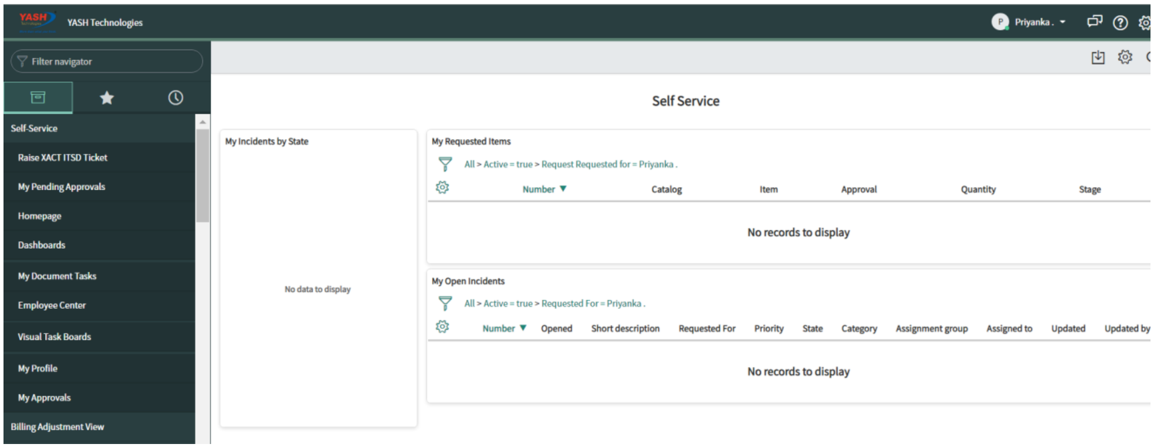
Project Manager, Delivery manager, BUH, BGH, Finance members

Walkthrough on Service Now:

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



Landing page should show below screen as per your role.



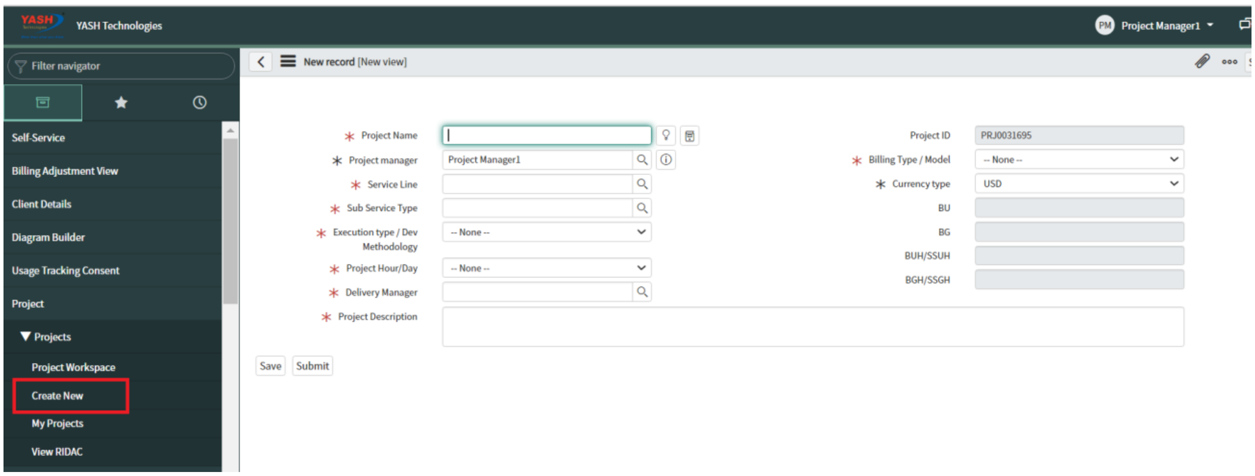
Creating A Project (Project Manager):

Before You Begin

Role required: Project Manager (it_project_manager)

Procedure

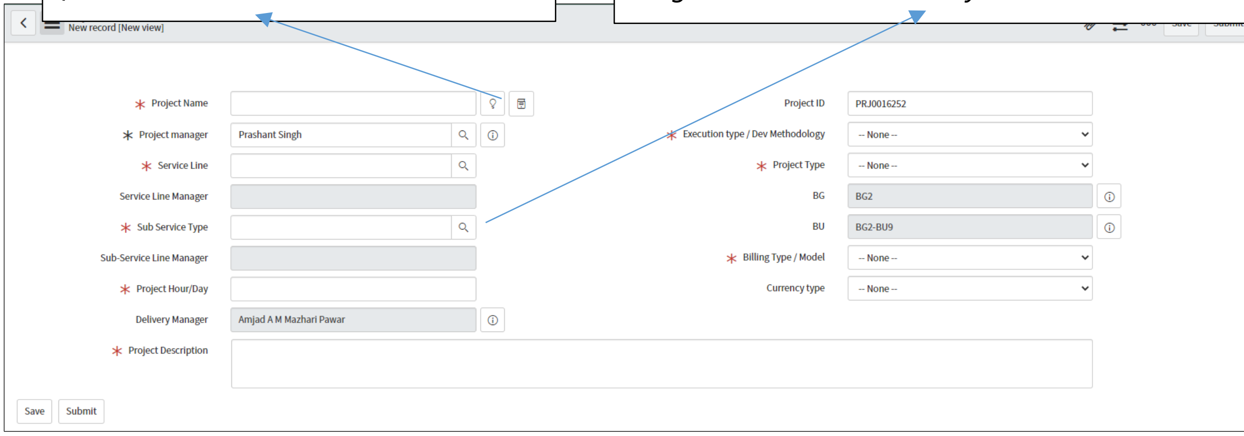
1. On Left hand side from the Projects list, navigate to Project > Create New.



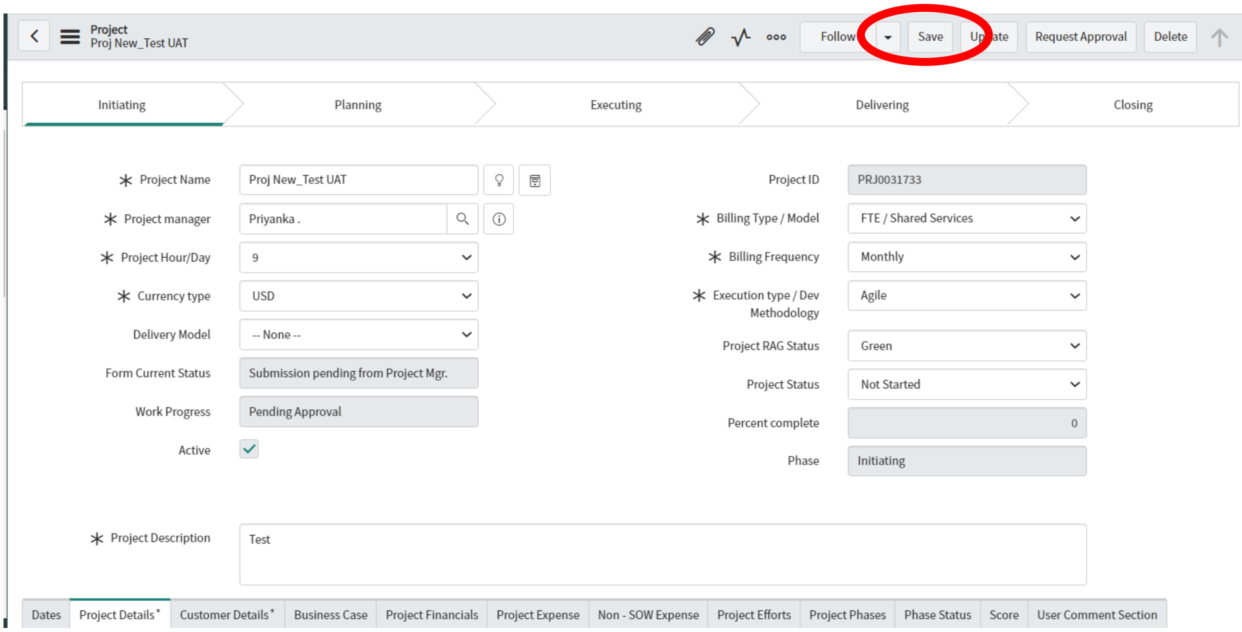
1. On the form, fill in the fields enter all the information in the mandatory fields.

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

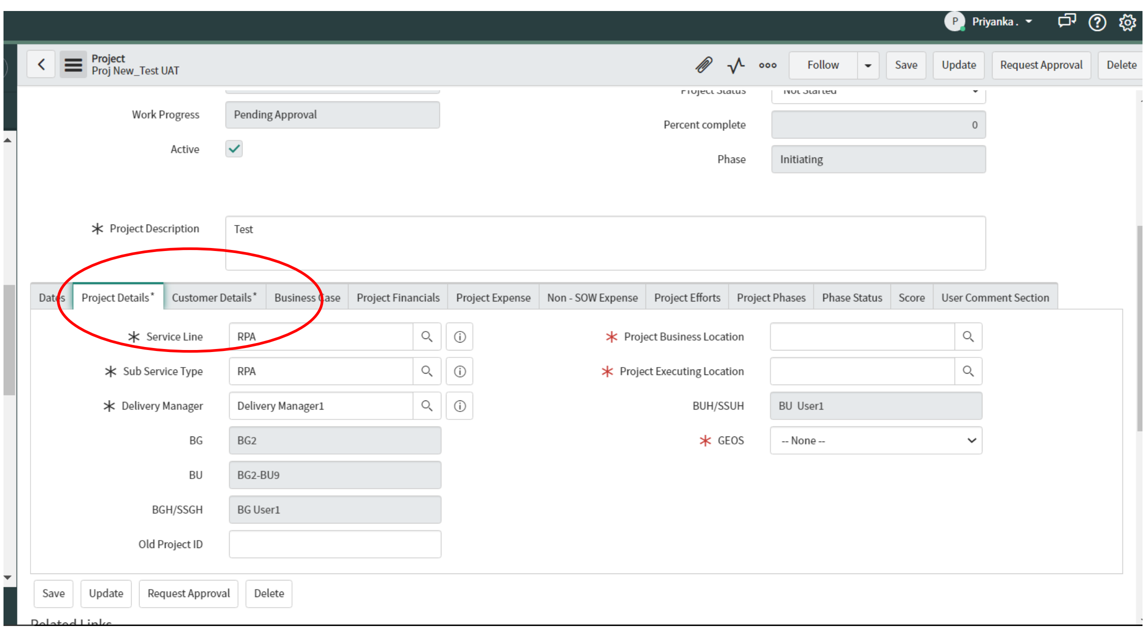
b. Select Service line, Sub Service type and corresponding service line manager values will be generated automatically.



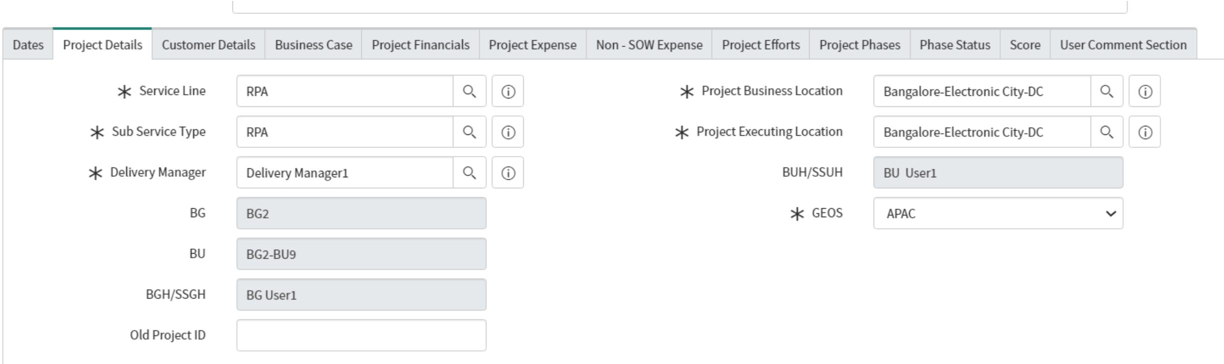
2. After filling the required fields, click on Save to create the project record in system.



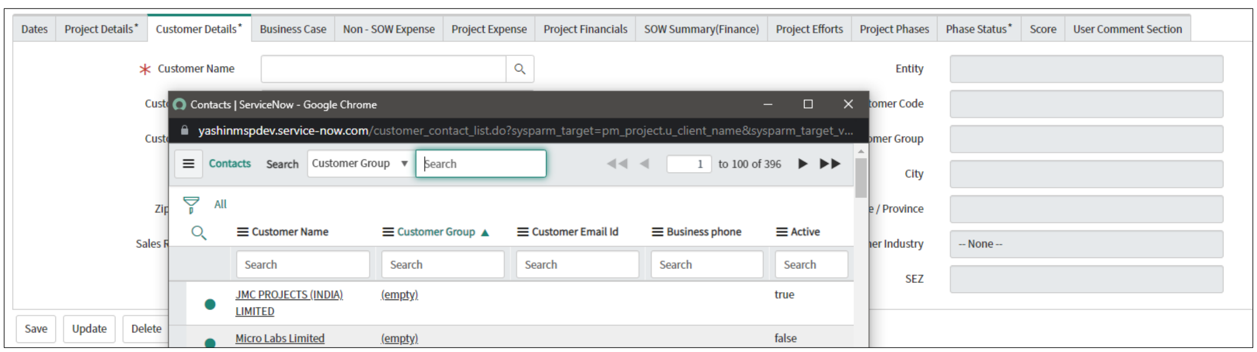
3. Project should get saved and below screen should appear. Asterix means here that below tabs are yet to be filled.



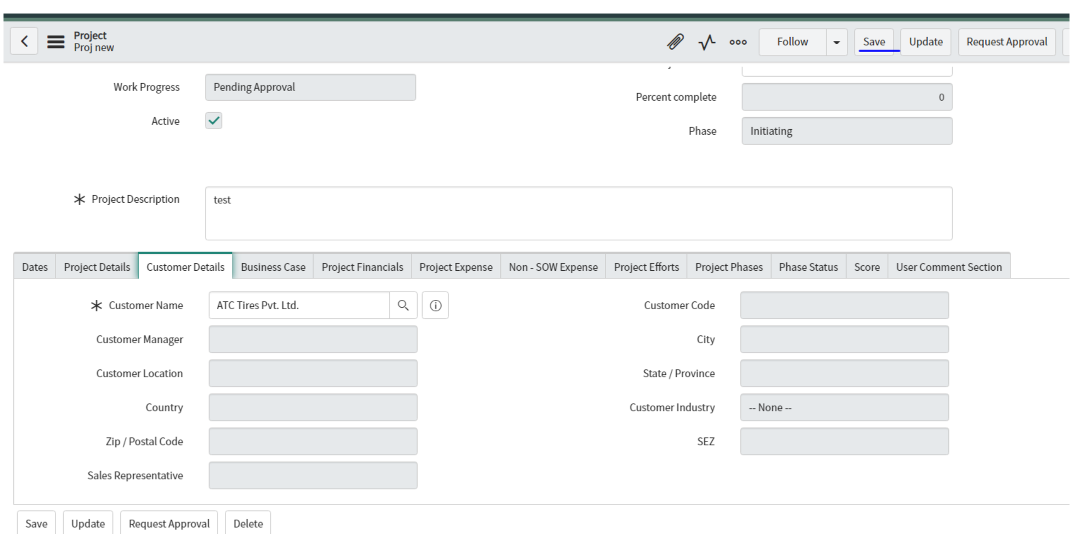
4. Add all Project Details in below screen.



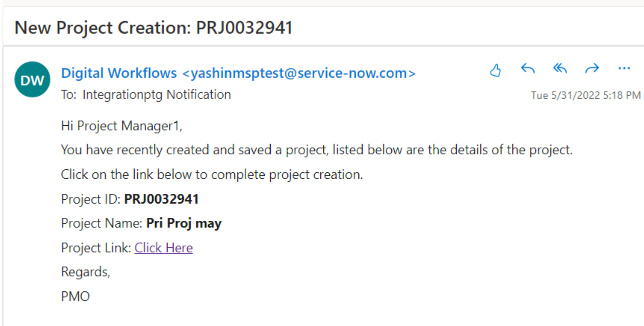
5. Add customer details



6. Click on save button.



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

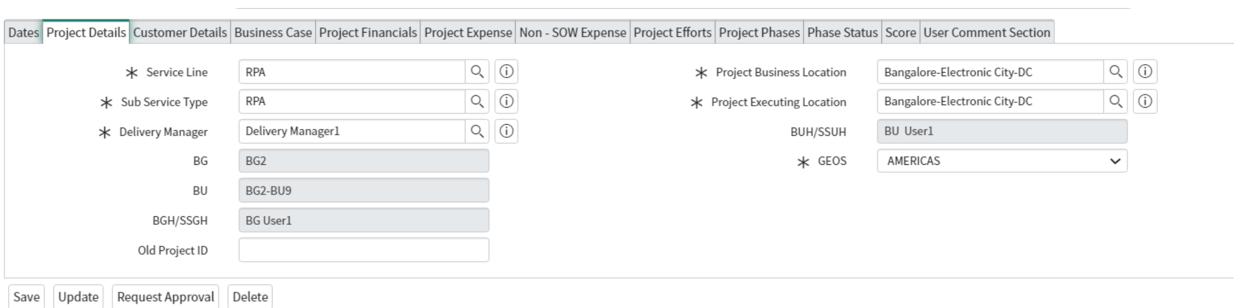


New Project Creation: PRJ0032941

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

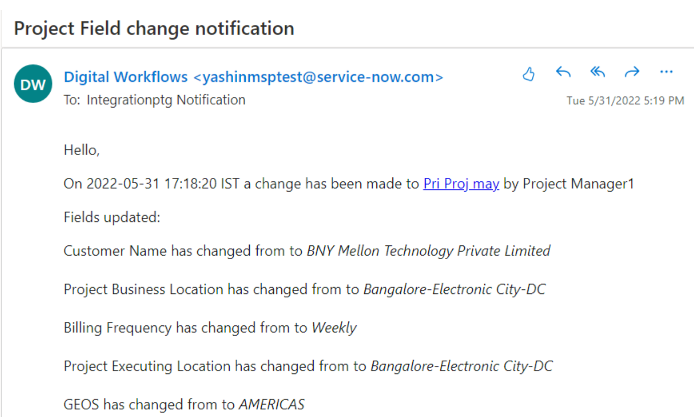
8. Below notification should be triggered for the changes/ addition done in Customer Details tab and Project Details tab:



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	* Project Business Location	Bangalore-Electronic City-DC
* Sub Service Type	RPA	* Project Executing Location	Bangalore-Electronic City-DC
* Delivery Manager	Delivery Manager1	BUH/SSUH	BU User1
BG	BG2	* GEOS	AMERICAS
BU	BG2-BU9		
BGH/SSGH	BG User1		
Old Project ID			

Save | Update | Request Approval | 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*

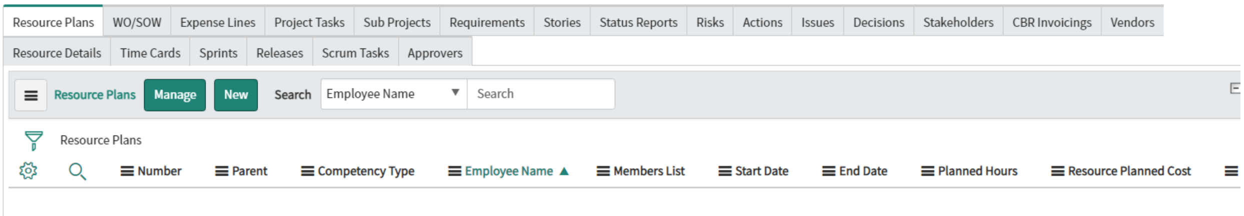
Project Business Location has changed from to *Bangalore-Electronic City-DC*

Billing Frequency has changed from to *Weekly*

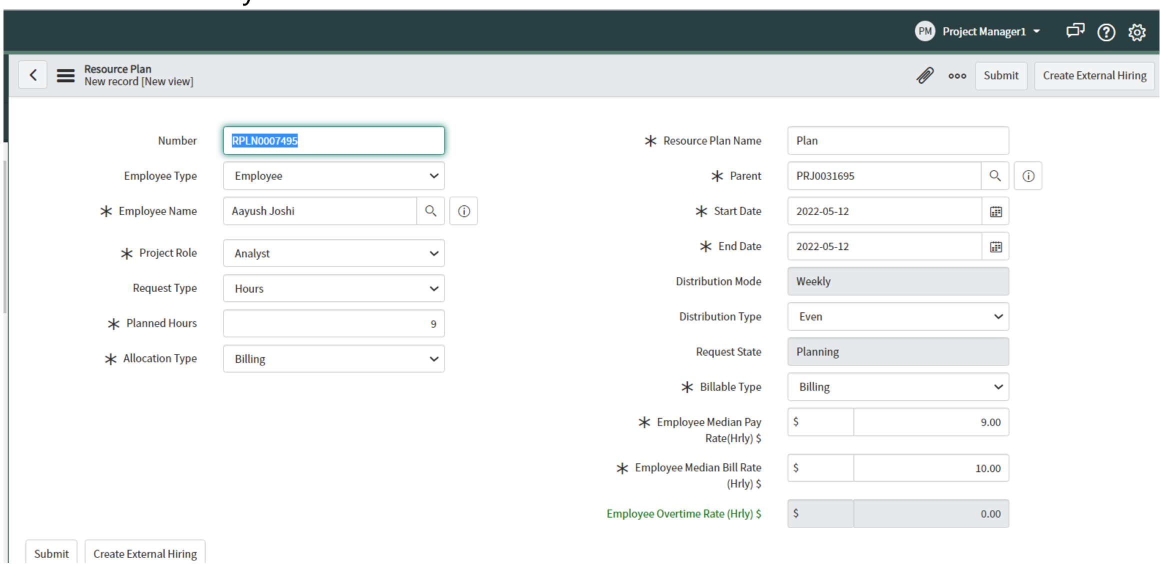
Project Executing Location has changed from to *Bangalore-Electronic City-DC*

GEOS has changed from to *AMERICAS*

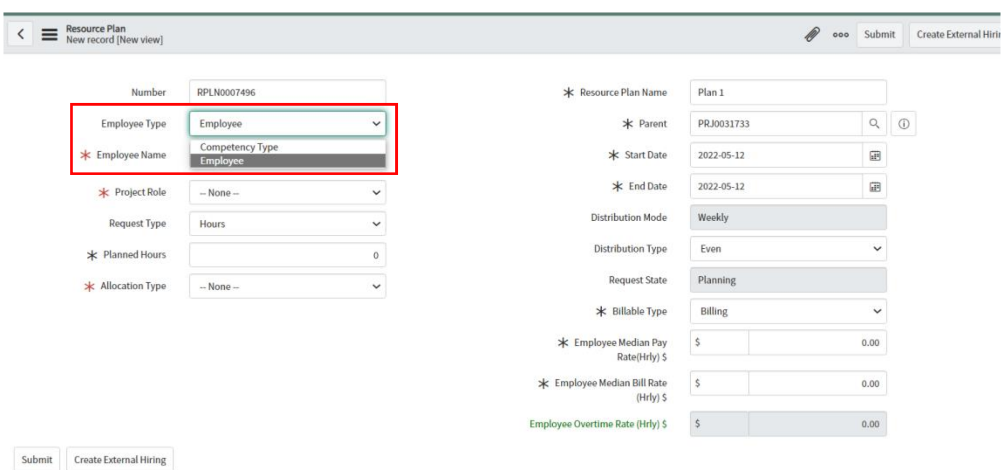
9. Now Navigate back to project and go to the bottom of project page and click on resource plan tab. Click New button and enter all mandatory details.



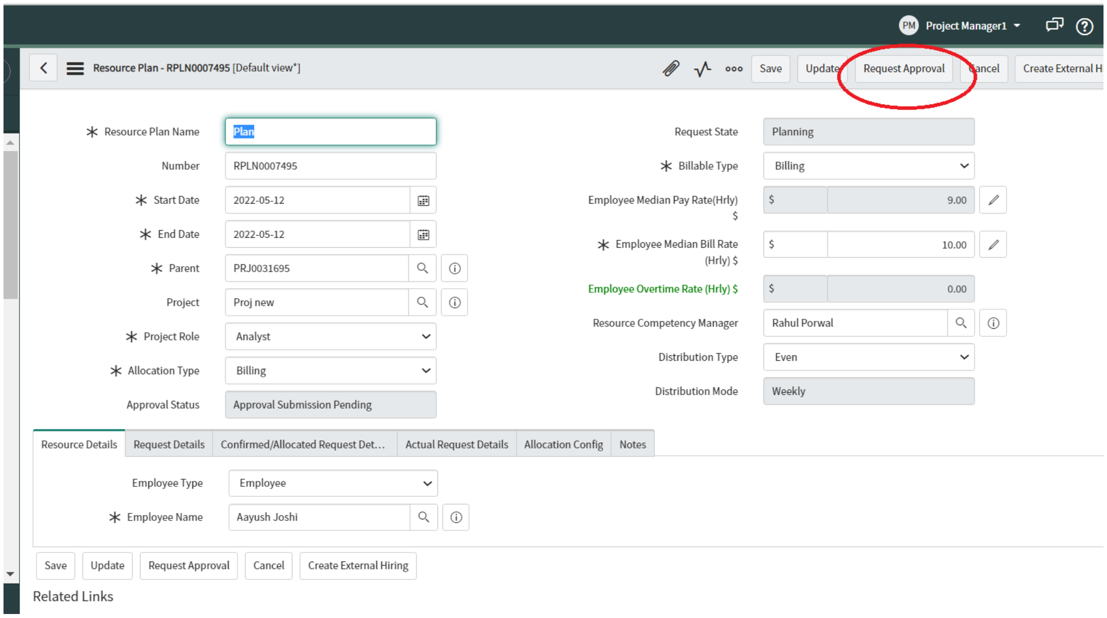
10. Enter all mandatory details and click on submit button.



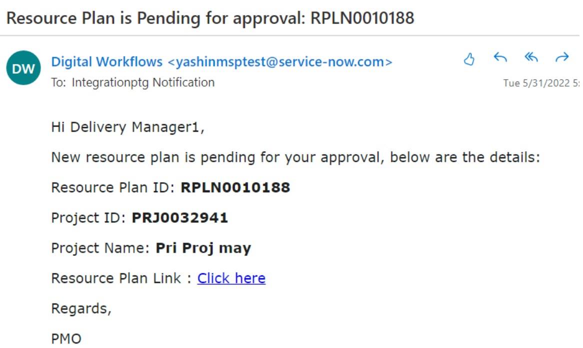
11. Project manager should be able to select either **employee or the competency type if resource detail is not known.**



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



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**

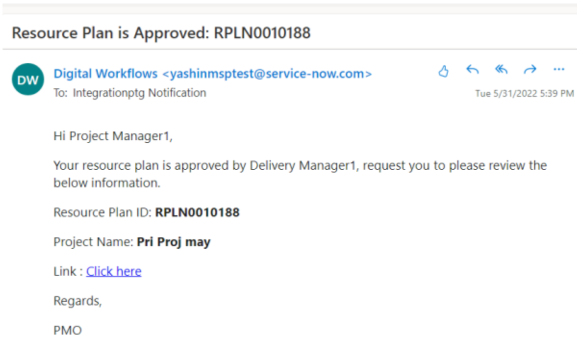
Project Name: **Pri Proj may**

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

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

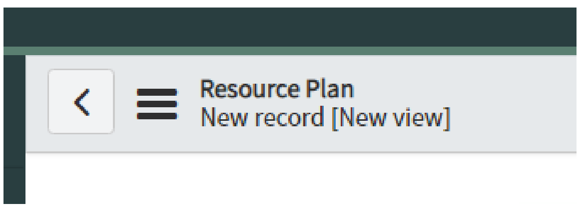
Project Name: **Pri Proj may**

Link : Click here

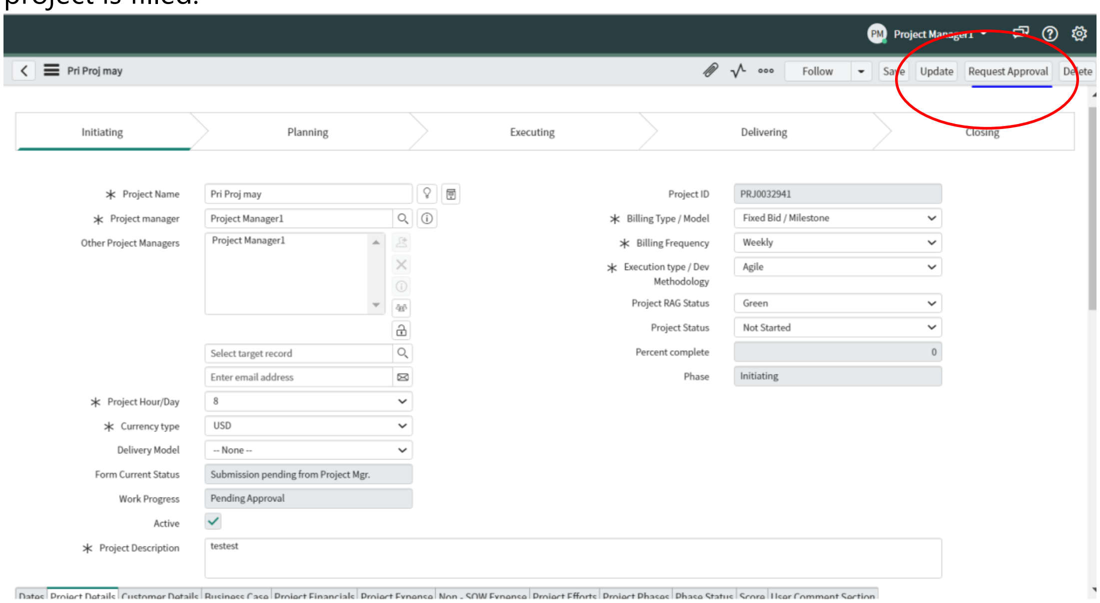
Regards,

PMO

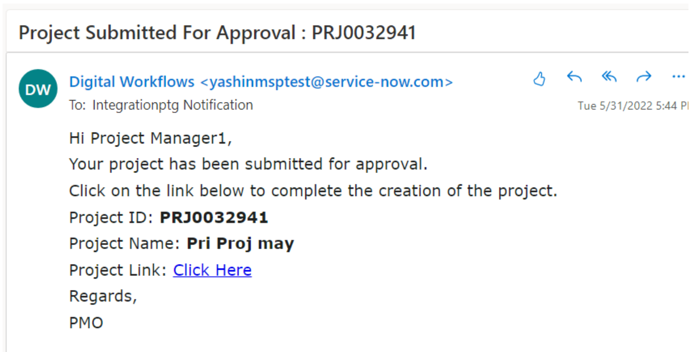
15. Navigate back to service now application and click on back button and navigate to project detail screen:



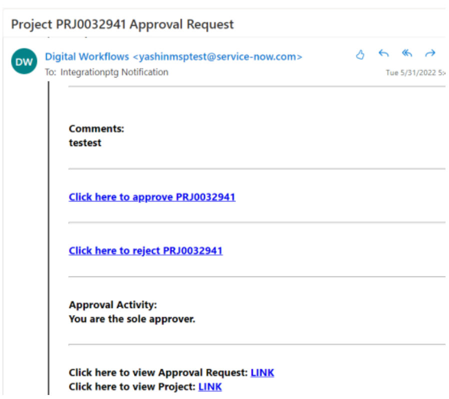
16. Now click on Request Approval button present for the newly created project, once all detail of project is filled.



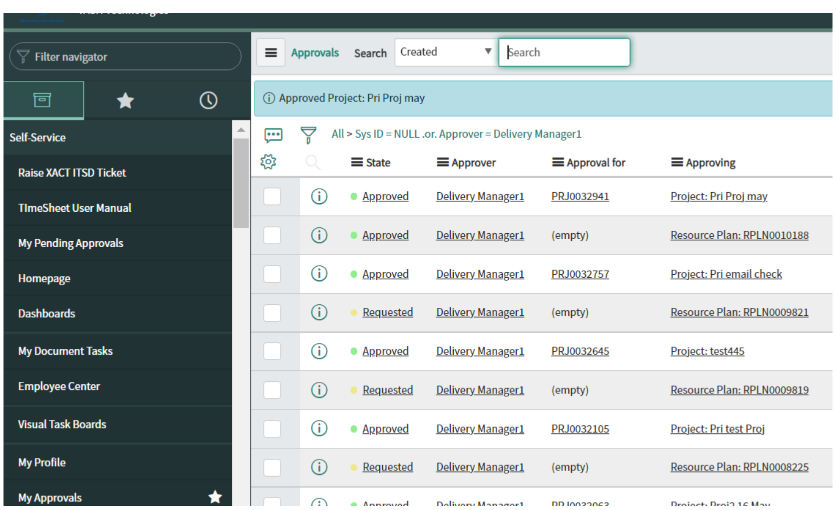
17. Below mail should be triggered to project manager, notifying that project is submitted for approval:



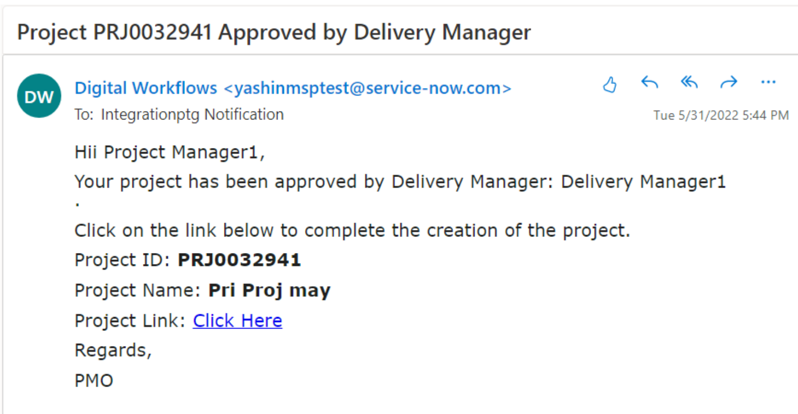
18. Below Mail should be sent to delivery manager, for approving the project:



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



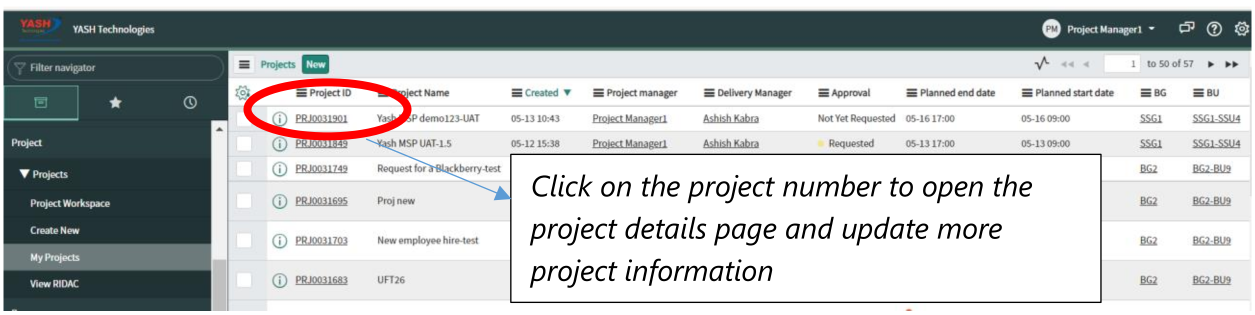
20. Below email should be triggered to Project manager, after delivery manager approves the project.


Project PRJ0032941 Approved by Delivery Manager

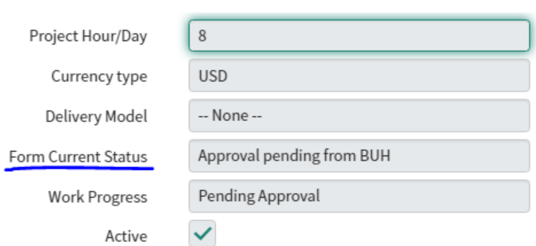
Digital Workflows <yashinmsptest@service-now.com>
To: Integrationptg Notification
Tue 5/31/2022 5:44 PM

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

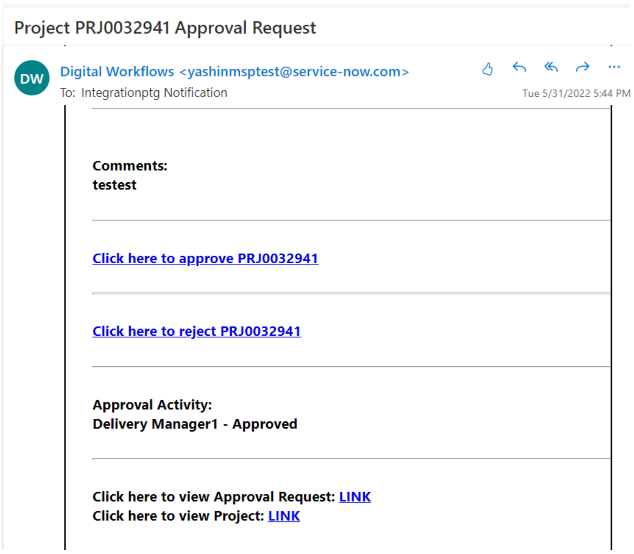
21. Login as Project manager again and navigate back to service now and click on **My Projects**. All newly created projects should be present in My Projects



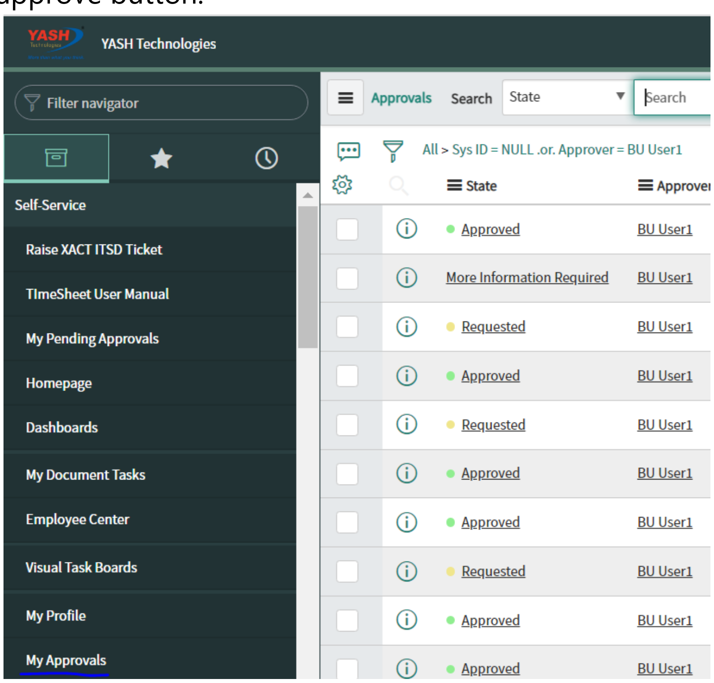
22. Click on the project and check the status of project.


Project Hour/Day	8
Currency type	USD
Delivery Model	-- None --
Form Current Status	Approval pending from BUH
Work Progress	Pending Approval
Active	✓

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.



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>
To: Integrationptg Notification
Tue 5,

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	✓
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>
To: Integrationptg Notification
Tue 5/31/2022 6:19 PM

Comments:
testest

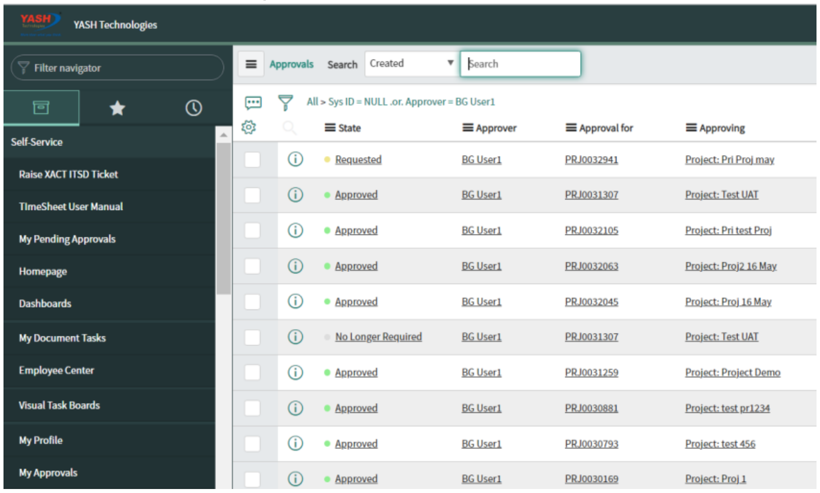
Click here to approve PRJ0032941

Click here to reject PRJ0032941

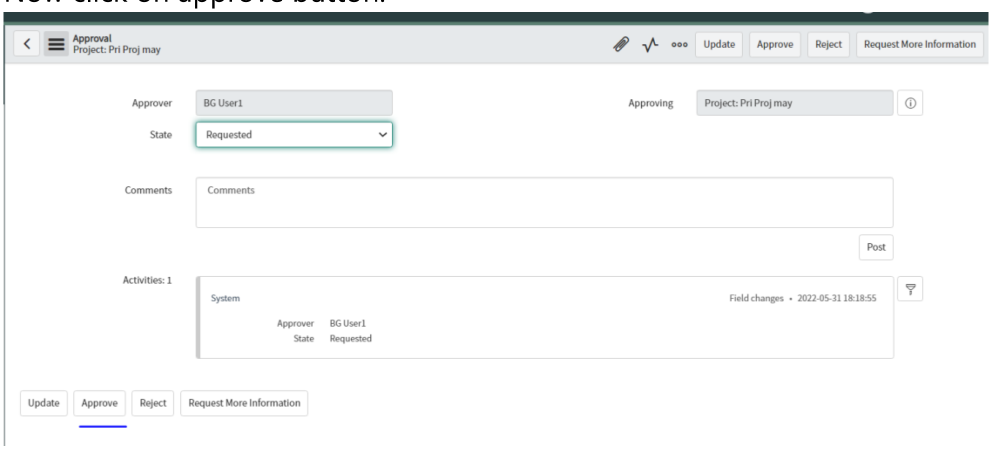
Approval Activity:
BU User1 - Approved
Delivery Manager1 - Approved

Click here to view Approval Request: LINK
Click here to view Project: LINK

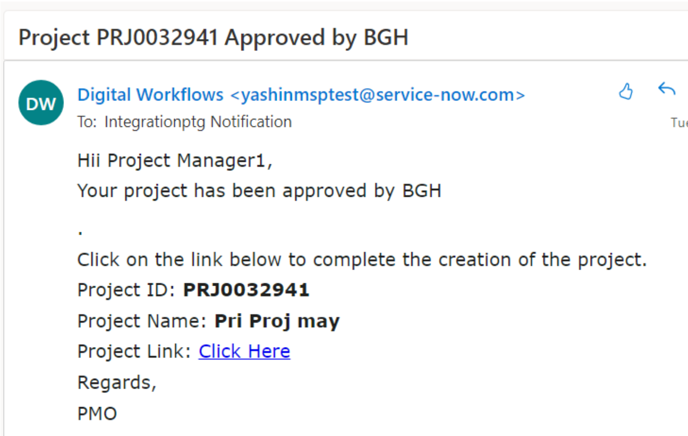
28. Now login as BGH and navigate to My approvals and select the record present in requested status and click to open the record.



Now click on approve button.



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



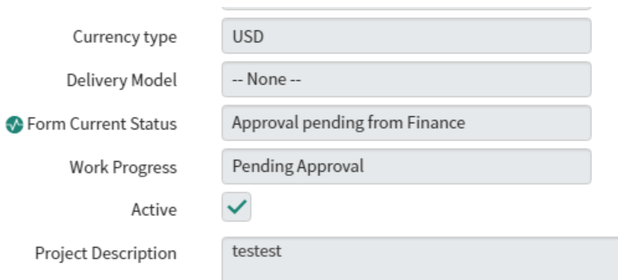
Project PRJ0032941 Approved by BGH

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

Hii Project Manager1,
Your project has been approved by BGH

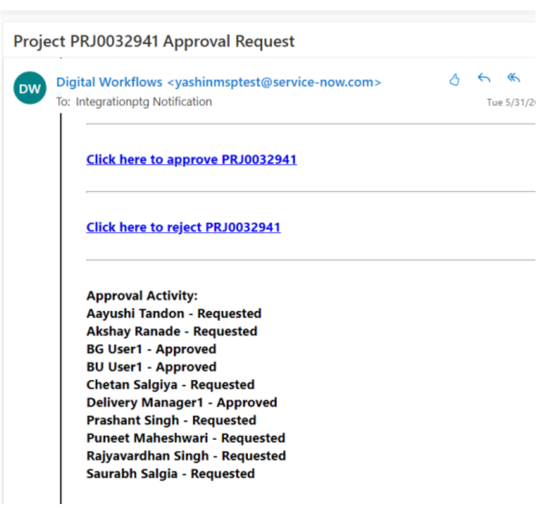
.
Click on the link below to complete the creation of the project.
Project ID: **PRJ0032941**
Project Name: **Pri Proj may**
Project Link: Click Here
Regards,
PMO

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	✓
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>
To: Integrationptg Notification
Tue 5/31/2

Click here to approve PRJ0032941

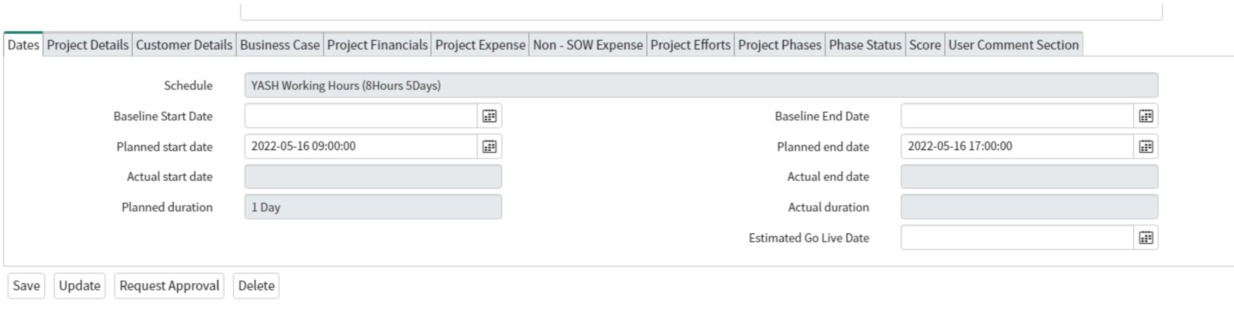
Click here to reject PRJ0032941

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

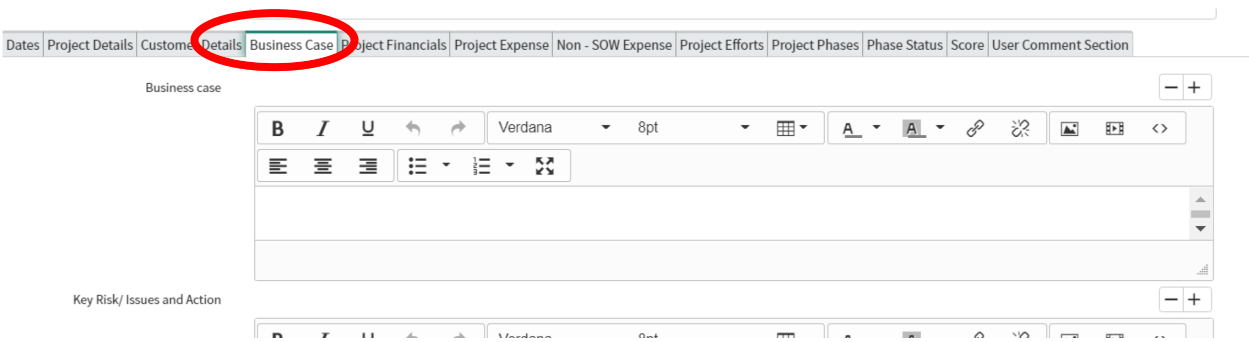
Updating/Adding Project Details:

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

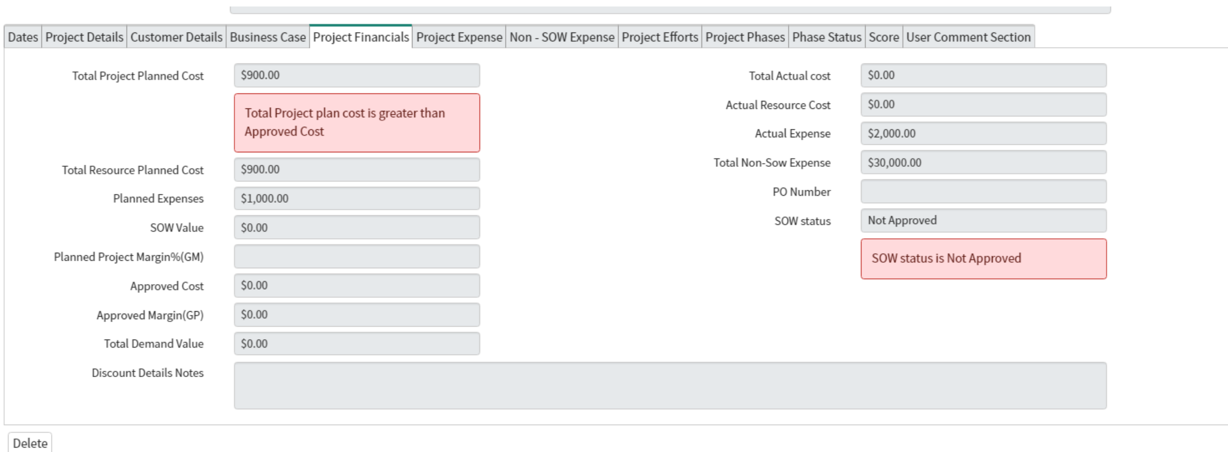
   Scroll down to see other project information tabs and fill in information for Project Dates.



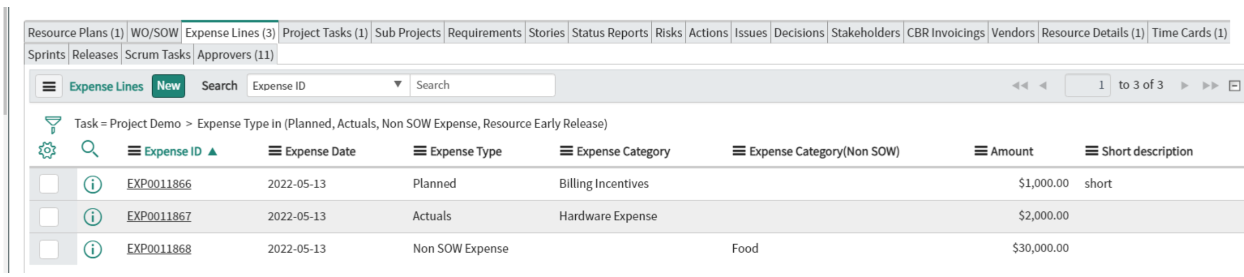
2. Add details for Business Case :



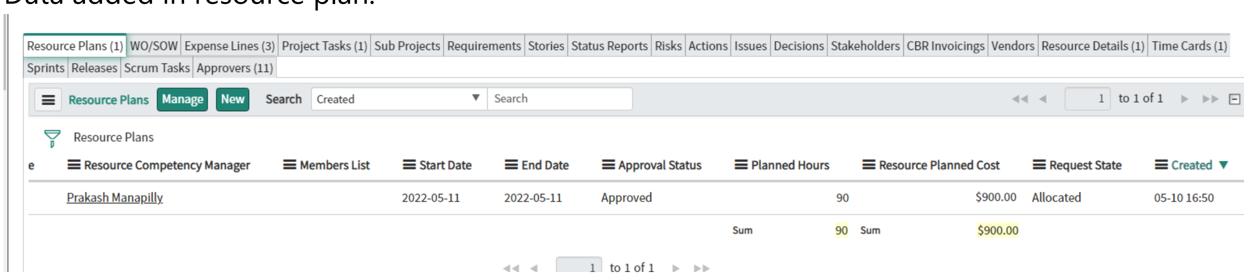
3. Verify project financial tab which should reflect data added in tabs like resource plans, expense lines etc.



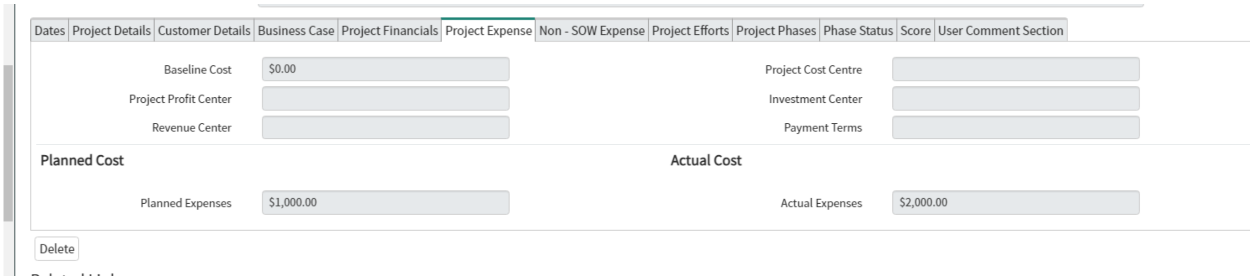
Below data added in expense lines:



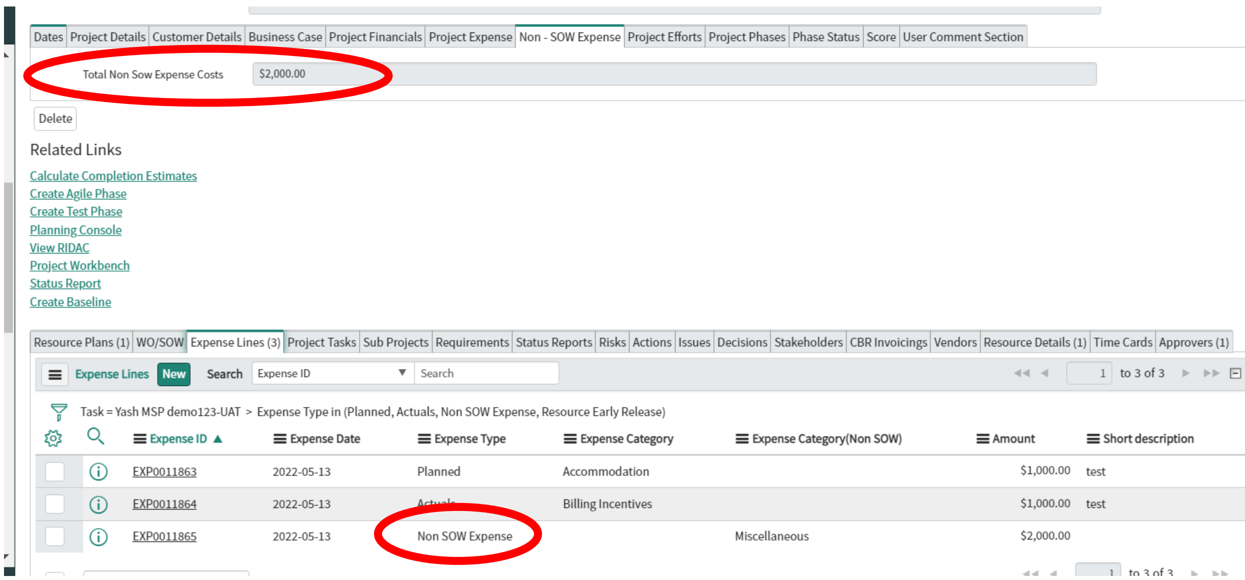
Data added in resource plan:



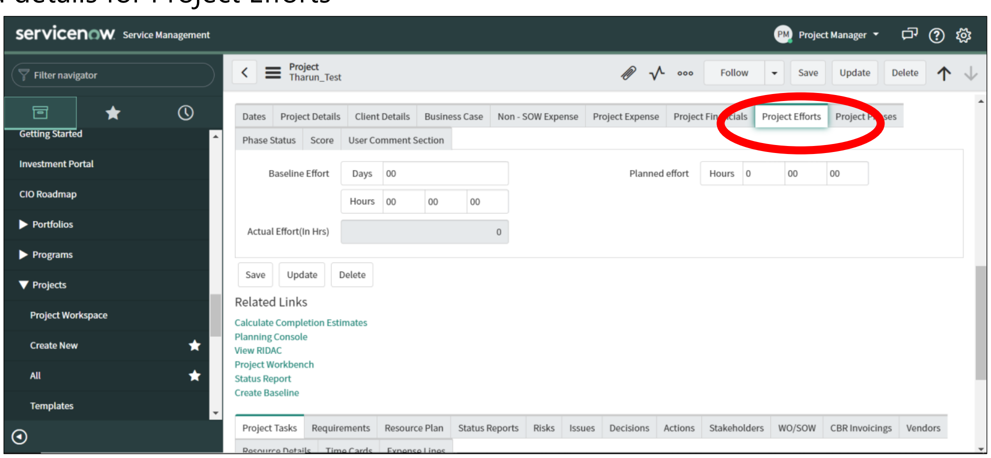
4. Verify the project expense detail:



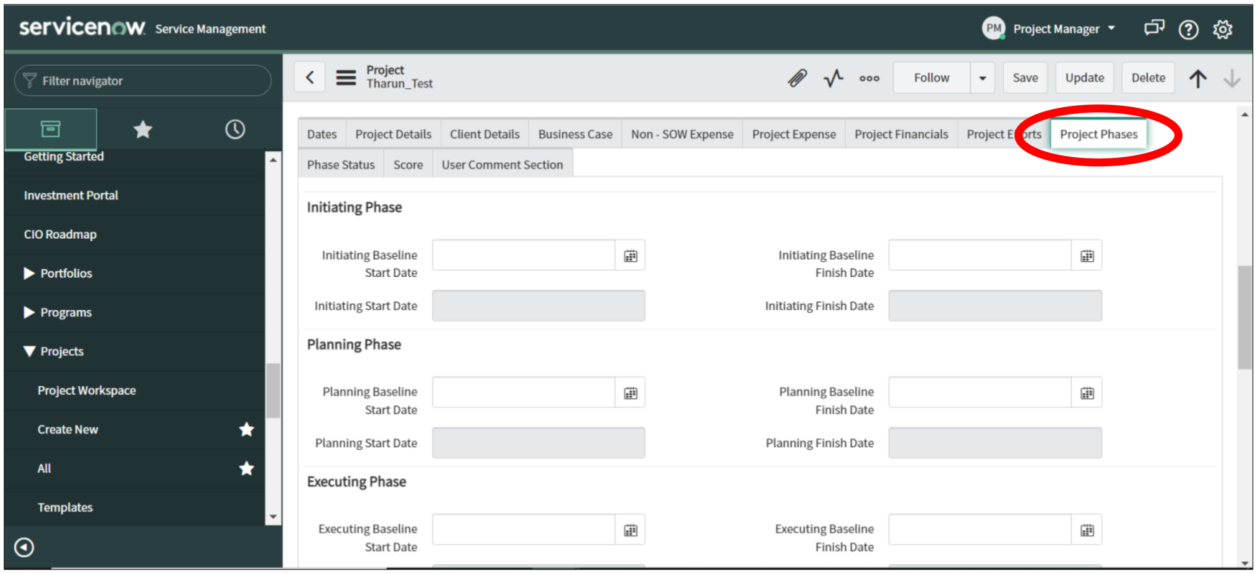
5. Verify Non-SOW Expense Details (*This section will be editable only after project approval*)



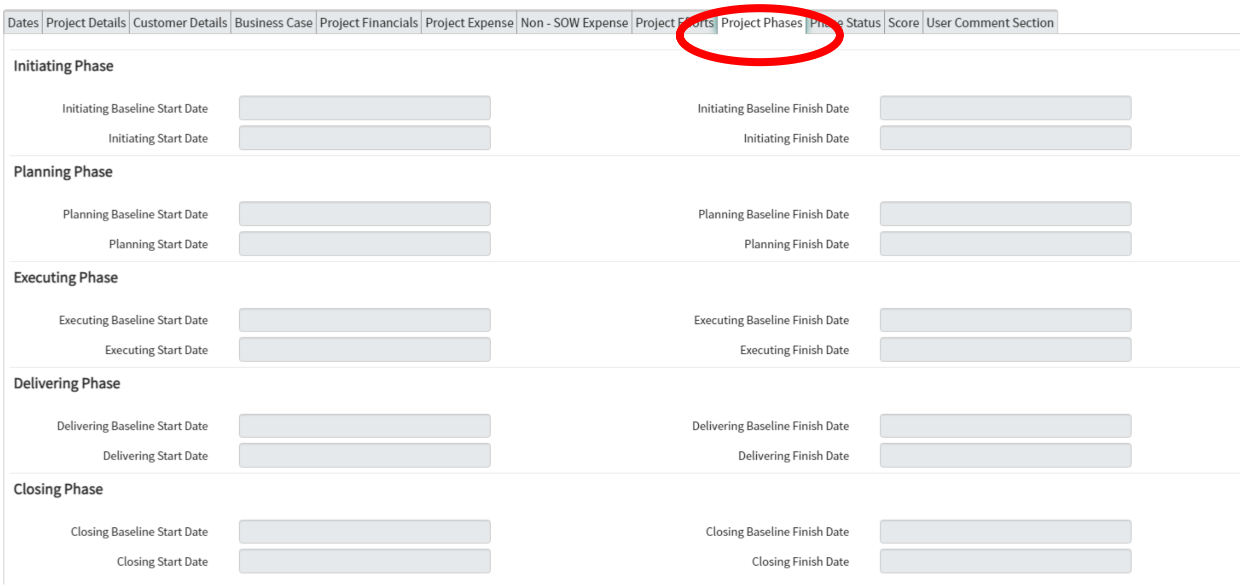
6. Add details for Project Efforts



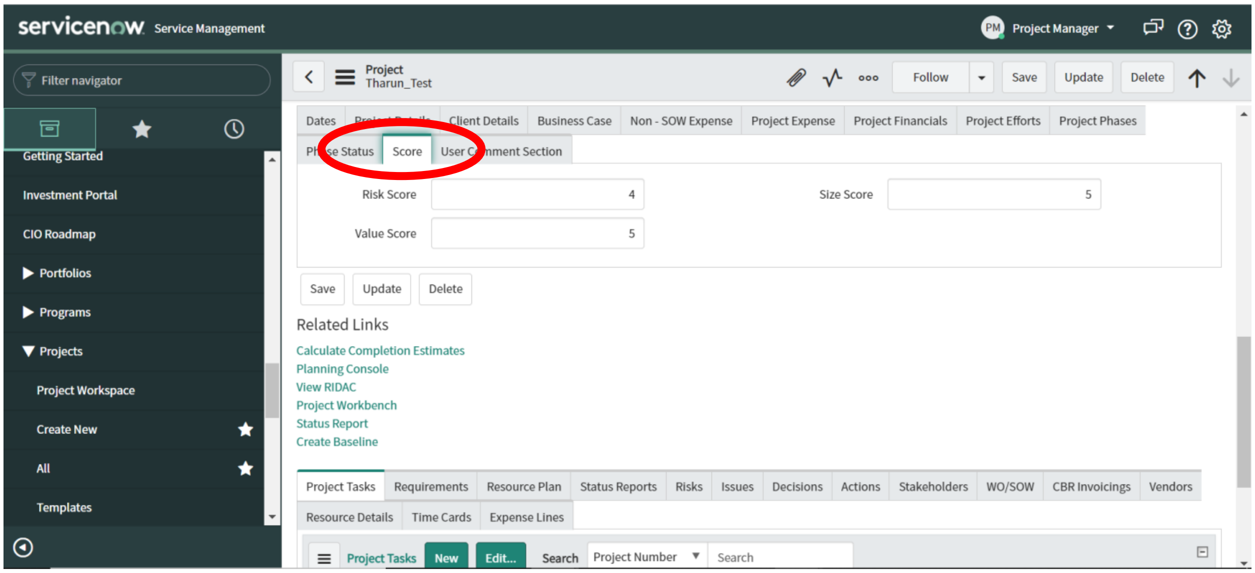
7. Add details of Project Phases.



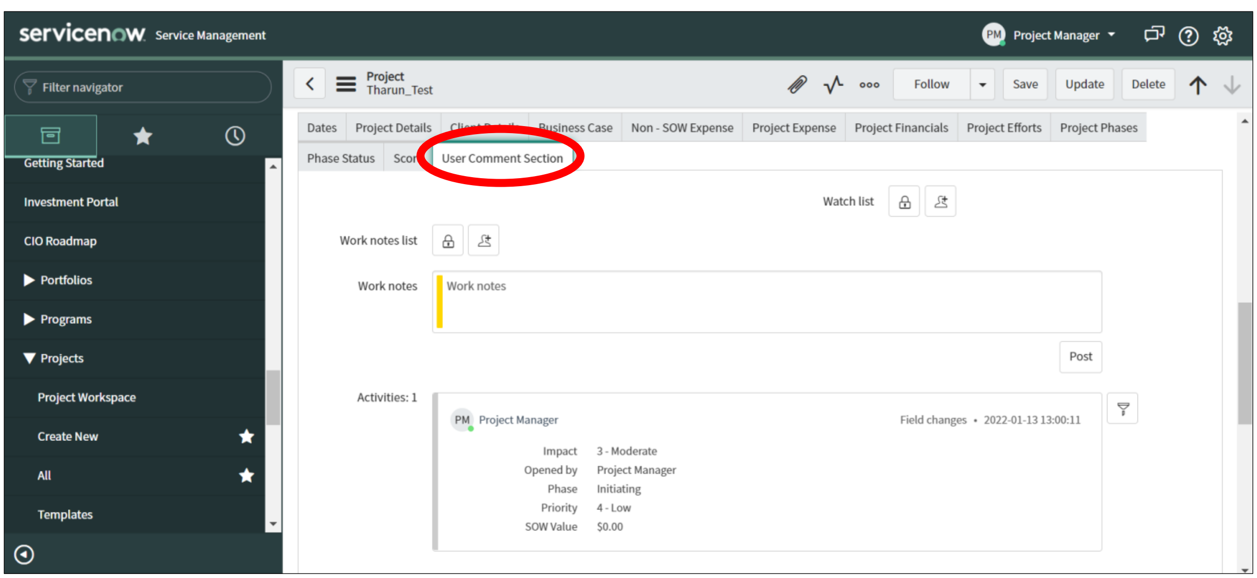
8. Click on Phase Status tab to view status information. Delivery manager should be able to change the phases.



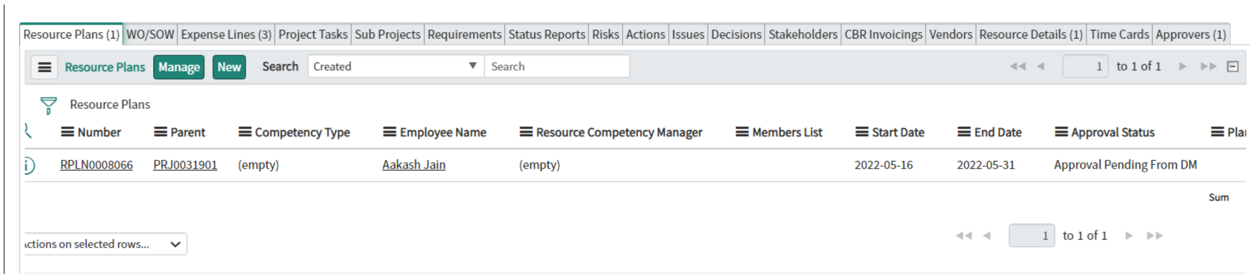
9. Add Score details



10. Add Comments in user comment section

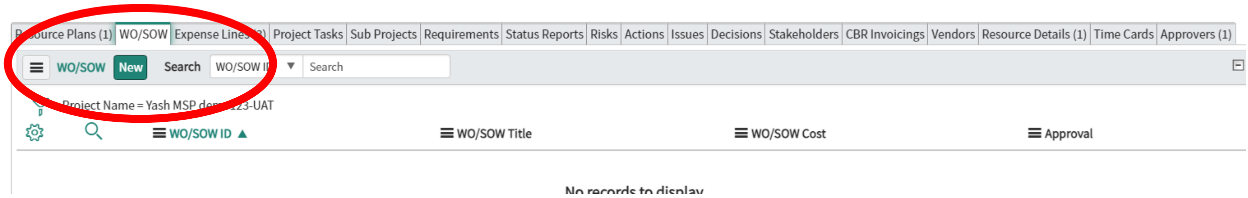


11. Scroll to add the information listed below in the respective tabs
    a. Resource Plan
    b. WO/SOW
    c. Expense Lines
    d. Project Tasks
    e. Sub-Projects
    f. Requirements
    g. Status Reports
    h. Risks
    i. Actions
    j. Issues
    k. Decisions
    l. Stakeholders
    m. CBR Invoicing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

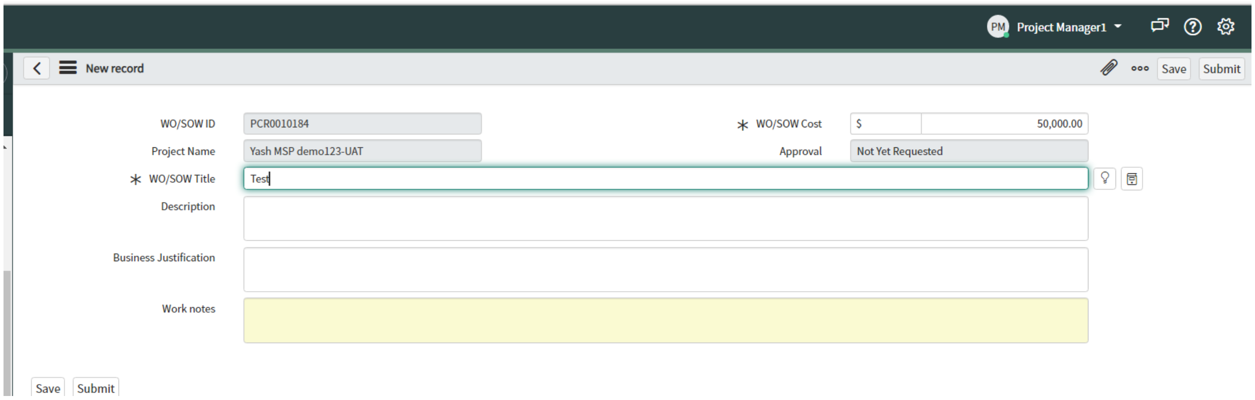


How to Create WO/SOW for the Project:

1. Navigate to WO/SOW and click on New



2. Enter all mandotory details and click on Submit:



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_UbzBxpZtnJIKsGxeNGVI

Thank you! | Received, and accepted. | Thank you for the update.

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 1 to 1 of 1

Project Name = Yash MSP demo123-UAT

WO/SOW ID ▲	WO/SOW Title	WO/SOW Cost	Approval
PCR0010184	Test	$50,000.00	Requested

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

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

SOW (PCR0010184) is approved by Ashish Kabra

Digital Workflows <yashinmsptest@service-now.com>
Fri 5/13/2022 7:12 PM
To: Integrationptg Notification

Hi Project Manager1,

The SOW for the project mentioned below has been approved. Click on the link below to view the project.

SOW ID: **PCR0010184**

Project ID: **PRJ0031901**

Project Name: **Yash MSP demo123-UAT**

Project Link: Click Here

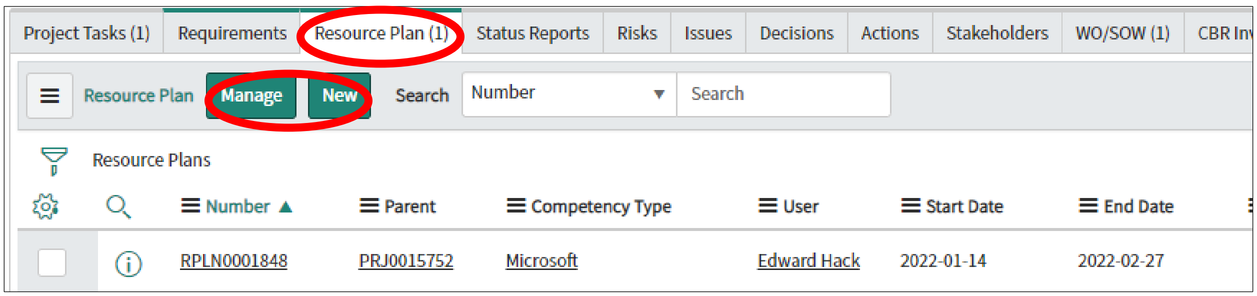
Regards,

PMO

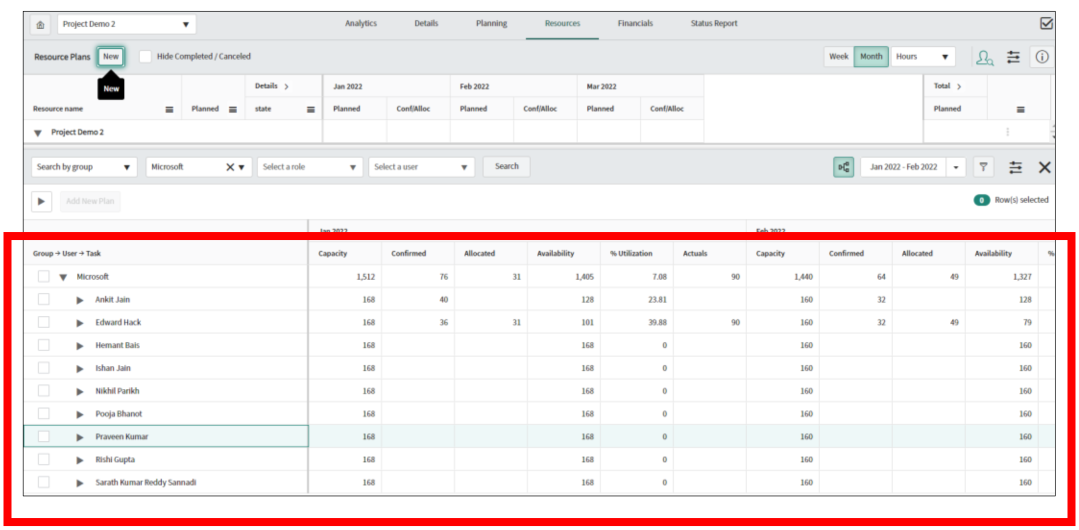
YASH Technologies
More than what you think.

Way to Create Resource Plan using manage button

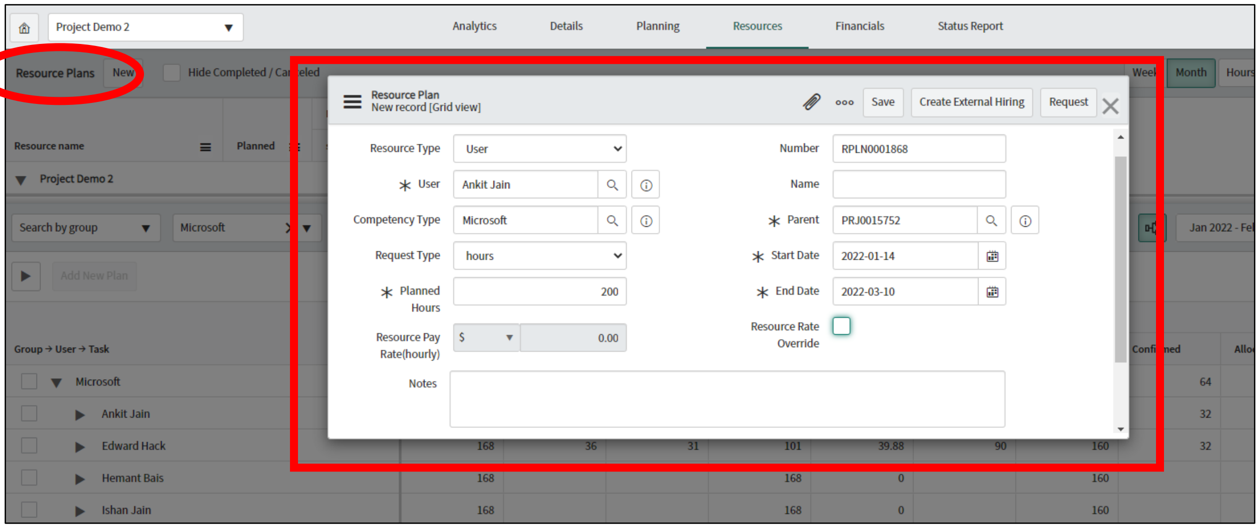
1. In Resource plan section click on New for the new plan, or click on Manage to review the existing resource allocation/availability details



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.



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]
Save
Create External Hiring
Request
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
Resource name
Planned
Project Demo 2
Search by group
Microsoft
Add New Plan
Group → User → Task
Microsoft
Ankit Jain
Edward Hack
Hemant Bais
Ishan Jain
Week
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Confirmed
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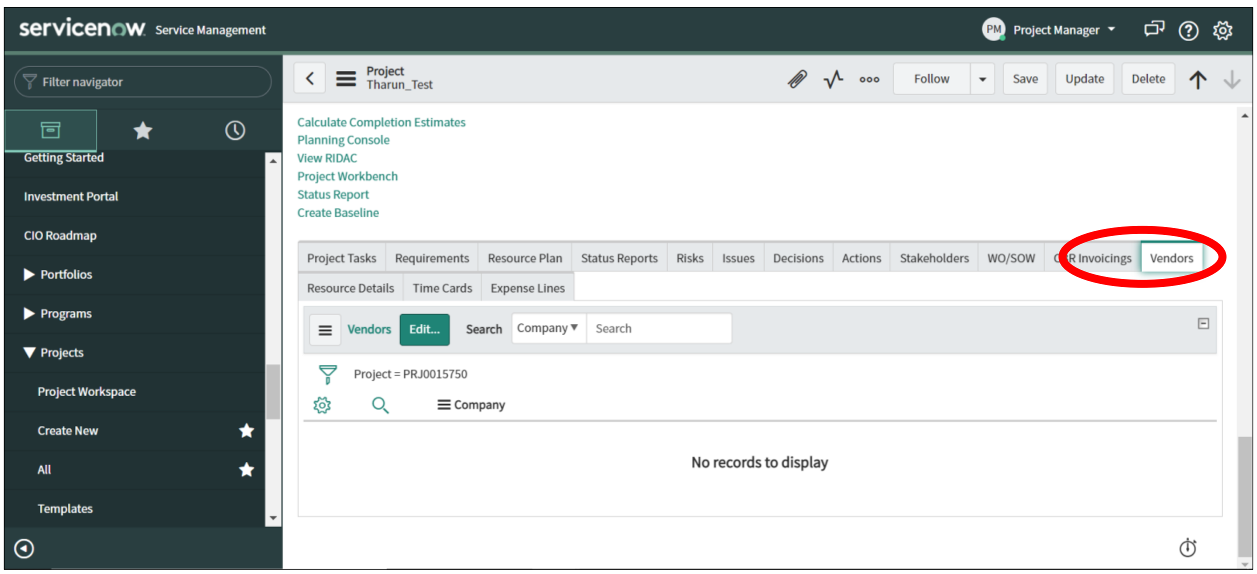
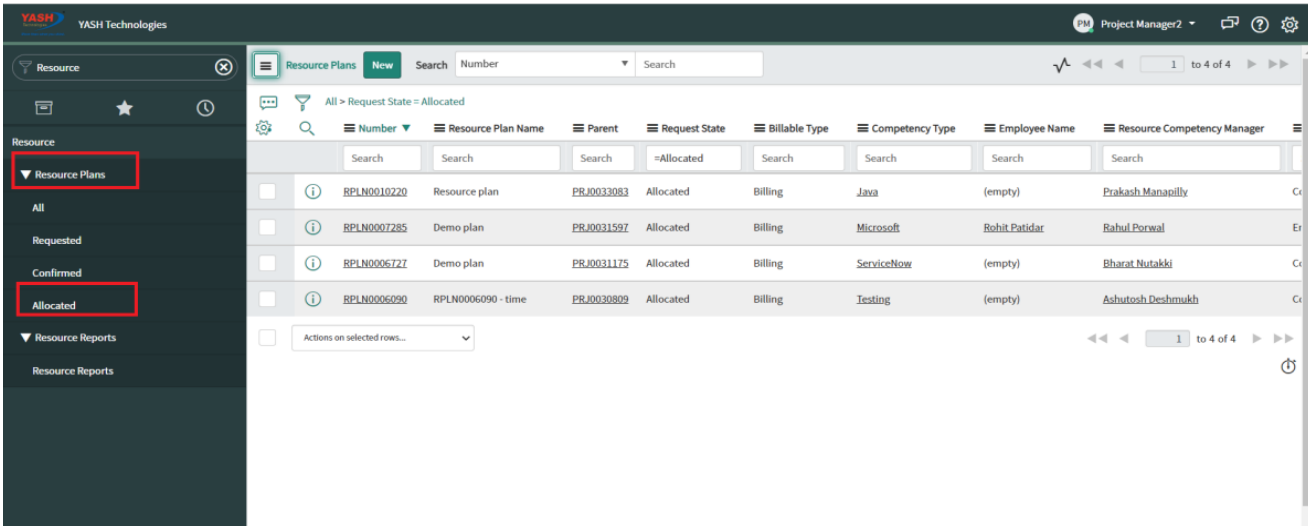
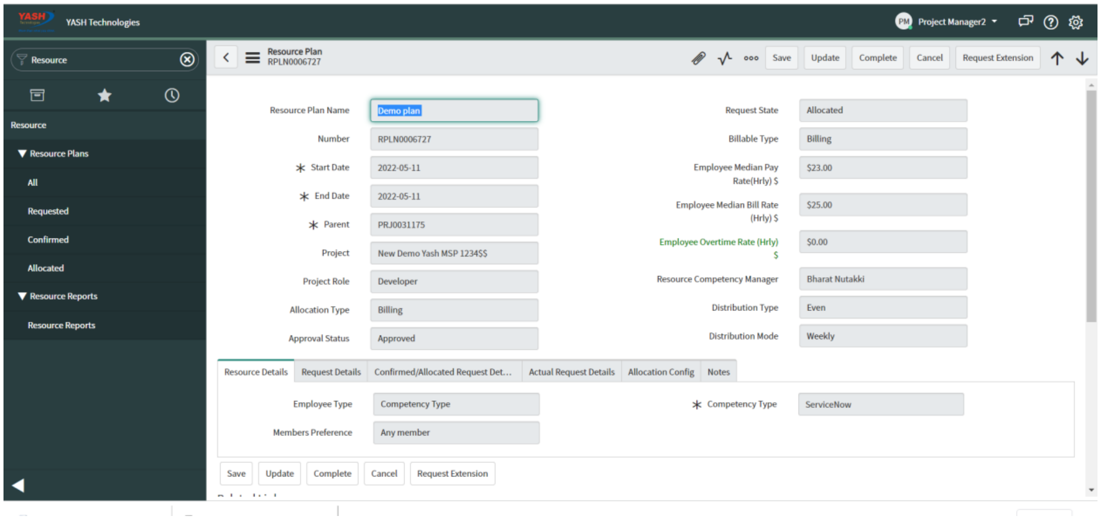

servicenow Service Management
Project Manager
Filter navigator
Getting Started
Investment Portal
CIO Roadmap
Portfolios
Programs
Projects
Project Workspace
Create New
All
Templates
Project
Tharun_Test
Follow
Save
Update
Delete
Calculate Completion Estimates
Planning Console
View RIDAC
Project Workbench
Status Report
Create Baseline
Project Tasks
Requirements
Resource Plan
Status Reports
Risks
Issues
Decisions
Actions
Stakeholders
WO/SOW
R Invoicings
Vendors
Resource Details
Time Cards
Expense Lines
Vendors
Edit...
Search
Company
Search
Project = PRJ0015750
Company
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

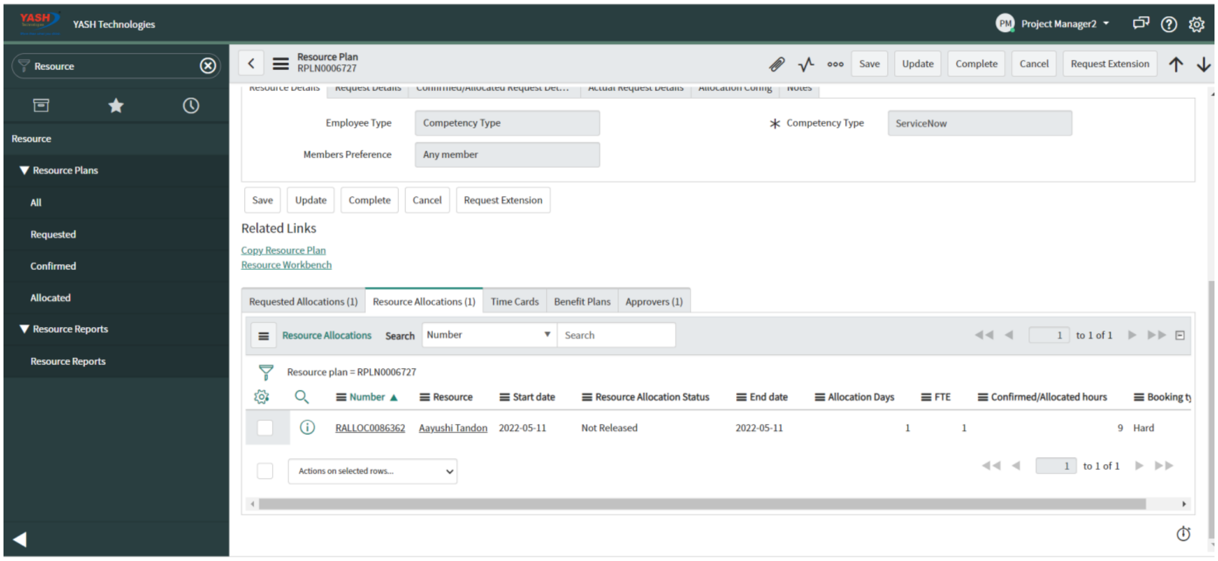


3. Verify the Project Name from list of resource plan and opening the record.

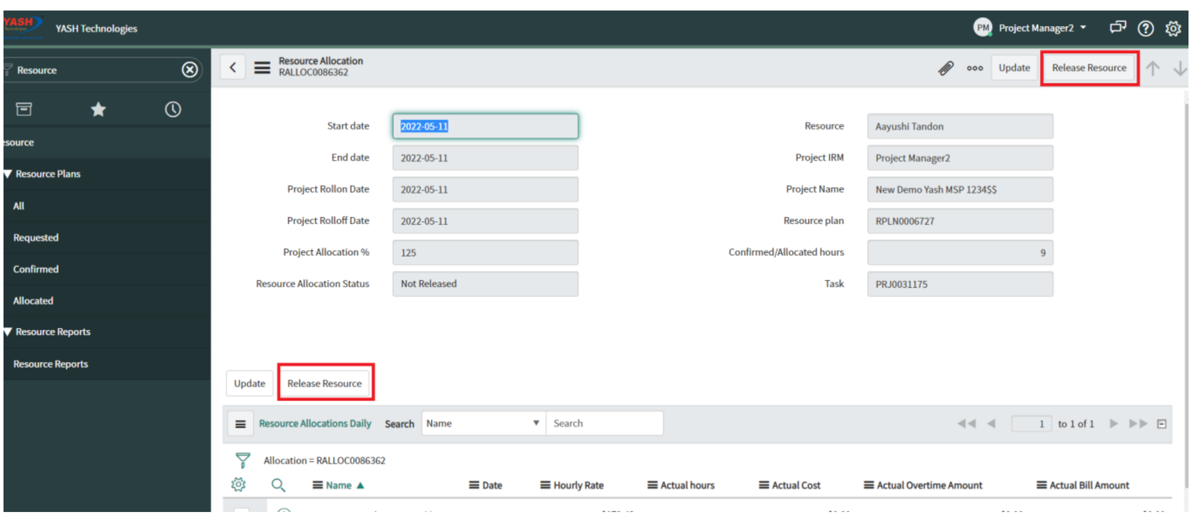


4. Scroll down into the form and go through the related tab > Click on Resource

Allocations > verify the Resource record.

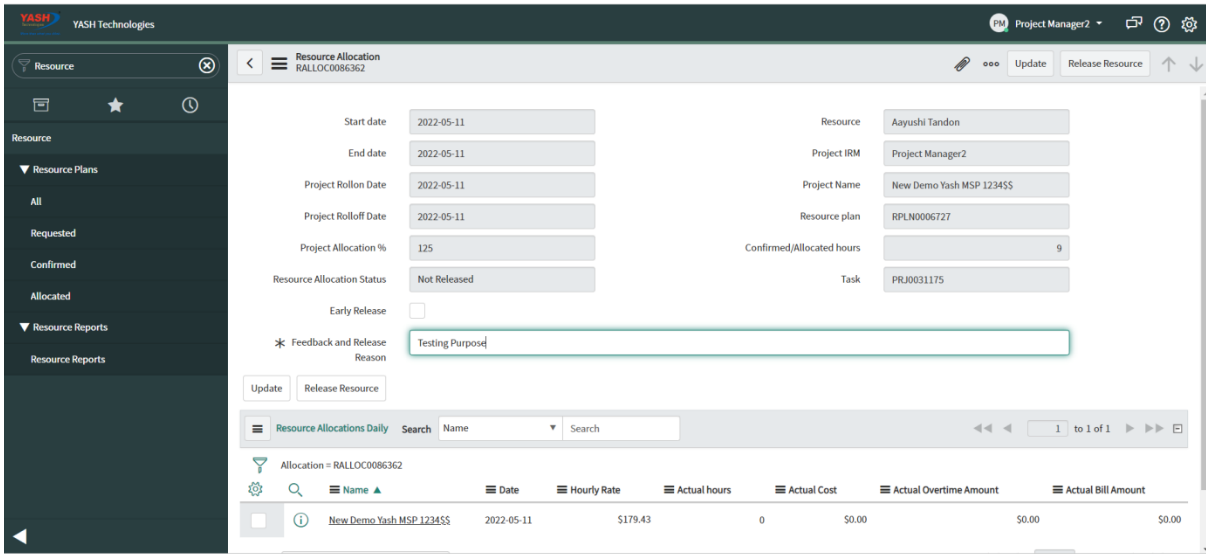


5. Opening the Record of Resource Plan > Verify the Resource Release UI Action > Click on the Button

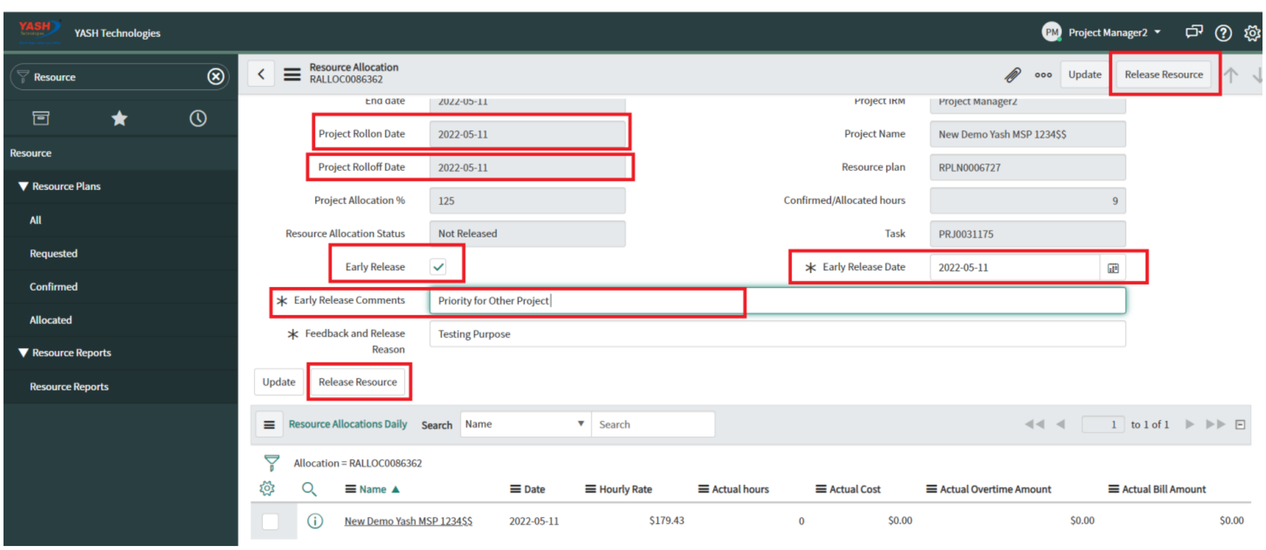


6. After Clicking on Resource Release button User need to give feedback and Release

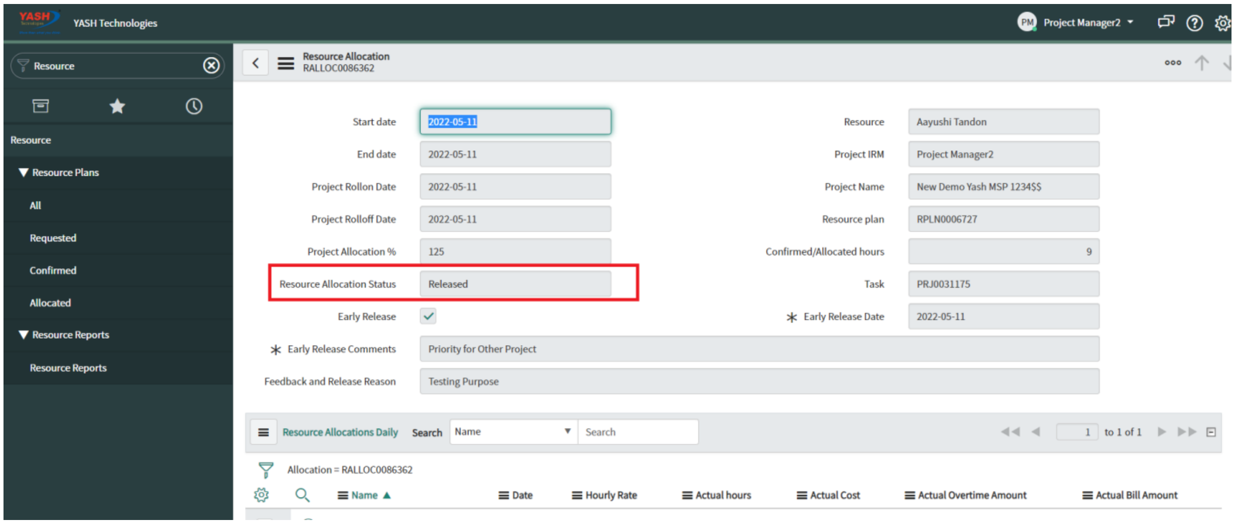
reason and Click on Resource Release button.



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 of 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

IS

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.