

Cost Management

Cost Management



Note: This article applies to Fuji. For more current information, see *Cost Management*^[1] at <http://docs.servicenow.com> The ServiceNow Wiki is no longer being updated. Please refer to <http://docs.servicenow.com> for the latest product documentation.

Overview

IT cost tracks configuration item costs. The costs can be allocated to business units and used in reports. Specifically, IT cost enables these features:

- Using rate cards.
- Defining configuration item (CI) costs.
- Tracking one-time costs for CIs.
- Processing recurring CI costs to generate expense lines.
- Distributing bulk costs to multiple expense line sources.
- Tracking costs related to tasks and projects.
- Aggregating configuration item costs and charging the total cost to a business service or application
- Allocating expense lines to business units with flexible allocation rules.
- Tracking planned and actual budget costs by cost center.

IT Cost Options

Use the following IT cost options to plan and control business costs.

- Create rate cards to properly track configuration item, contract, task, and labor costs.
- Create expense lines and expense allocation rules.
- Aggregate configuration item costs and apply the total cost to a business service or application using relationship paths.
- Create distribution costs and distribution cost rules to divide costs between a group of records.

Roles

IT cost uses the following user roles:

Role title [name]	Description
financial admin [financial_mgmt_admin]	Manages financial processes in the system.
financial user [financial_mgmt_user]	Participates in financial processes and has limited access to functionality.



Note: The IT Finance application also uses these roles, starting with the Fuji release.

A user with the user_admin or admin role can assign the appropriate roles. For more information about user administration and instructions for assigning roles, see [Creating Users and Associating to a Group](#).

Menus and Modules

Activating the IT Cost Management feature adds the **IT Cost** application menus.



Note: The application name in the navigator is **Financial Management** prior to the Fuji release.

<div>IT Cost</div> <ul style="list-style-type: none"> Cost Overview Depreciation Fixed Assets Costs <ul style="list-style-type: none"> Rate Cards CI Rate Cards Contract Rate Cards Distribution Costs Task Rate Cards Labor Rate Cards Expense Lines Expense Allocations Config <ul style="list-style-type: none"> Business Services Allocation Units Cost Center Budgets Administration <ul style="list-style-type: none"> Properties Distribution Cost Rules Expense Allocation Rules Relationship Paths Log 	<ul style="list-style-type: none"> • Cost Overview: View the Cost Management overview page, which is a homepage that displays graphs and charts for managing costs. • Depreciation: View, create, and edit depreciation schedules, which calculate depreciation for fixed assets. This module is available by default. • Fixed Assets: View, create, and edit fixed assets, which are containers that can hold multiple assets. This module is available by default. • Costs <ul style="list-style-type: none"> • Rate Cards: View, create, and edit rate cards. • CI Rate Cards: View, create, and manage rate cards for configuration items (CIs). • Contract Rate Cards: View, create, and edit contract rate cards, which provide detailed price information for a contract. • Distribution Costs: View, define, and edit distribution costs, which are costs that can be divided among a group of records. • Task Rate Cards: View, define, and edit task rate cards, which define the type of task and the method of calculating the associated costs. • Labor Rate Cards: View, define, and edit labor rate cards, which define worker's labor rates when calculating task cost based on time worked. • Expense Lines: View, create, and edit expense lines, which track costs and represent a point-in-time expense incurred. This module is available by default. • Expense Allocations: View, create, and edit expense allocations, which associate expenses with items such as users, groups, or departments. • Config <ul style="list-style-type: none"> • Business Services: View, define, and edit business services in the CMDB. The list of business services appears in the Cost view. • Allocation Units: View, define, and edit allocation units, which define the capacity and usage of a business service. • Cost Center: View, define, and edit cost centers, which represent business entities in the organization. This module is available by default. • Budgets: View, define, and edit budgets, which allow tracking of planned and actual IT spending. • Administration <ul style="list-style-type: none"> • Properties: Configure properties for IT cost management. • Distribution Cost Rules: View, define, and edit distribution cost rules, which determine how distribution costs are divided among the CIs. • Expense Allocation Rules: View, create, and edit allocation rules, which associate expenses with an item, such as a user, group, or department. • Relationship Paths: View, define, and edit relationship paths, which aggregate expenses to parents. • Log: View the IT cost management logs, which store information for tracking and debugging.
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Activating IT Cost Management

Administrators can activate the IT Cost Management plugin.

Click the plus to expand instructions for activating a plugin.

If you have the admin role, use the following steps to activate the plugin.

1. Navigate to **System Definition > Plugins**.
2. Right-click the plugin name on the list and select **Activate/Upgrade**.

If the plugin depends on other plugins, these plugins are listed along with their activation status.

3. [Optional] If available, select the **Load demo data** check box.

Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance. You can load demo data after the plugin is activated by repeating this process and selecting the check box.

4. Click **Activate**.

Enhancements

Fuji

- The application name appears as **IT Cost** in the application navigator. The plugin name remains **IT Cost Management**.

Dublin

- The plugin is named **IT Cost Management**.
- Only users with the `financial_mgmt_admin` or `admin` role can customize the **Cost Overview** page.
- The contract rate card end date is automatically set to the contract end date if no value is entered.

References

- [1] https://docs.servicenow.com/bundle/jakarta-it-business-management/page/product/cost-management/reference/r_CostManagement.html

Installed with Cost Management

Overview

The following components are installed with the Cost Management plugin starting with the Calgary release.

- Tables
- Properties
- User Roles
- UI Policies
- Script Includes
- Client Scripts
- Business Rules

Demo data is available with cost management. The demo data provides sample budgets, distribution costs, expense allocations, contract rate cards, and rate card costs. For details, see [Cost Management Demo Data](#).

If you are using an older version, see [previous version information](#).

Tables

Cost Management adds the following tables.

Table	Description
Allocation Unit [allocation_unit]	Tracks capacity and usage for a business service. Stores reference to business service, total, allocated, and remaining units of capacity.
Budget [fm_budget]	Tracks planned and total expense allocation amounts for a collection of cost centers.
Budget Cost Center [fm_budget_cost_center]	Associates one or more cost centers to a budget.
CI Cost Center Relationship [fm_cmdb_rel_cc]	Associates a cost center to a business service that it consumes and the number of units it uses. This is used to calculate the number of allocated units to update the allocation unit record.
CI Rate Card [fm_ci_rate_card]	Links configuration items and costs. A classification can also be defined to allow for multiple rate cards for a group of CIs.
CI Rate Cards [fm_ci_rate_card_cmdb_ci_m2m]	Associates configuration items to a rate card.
Contract Rate Card [fm_contract_rate_card]	Provides detailed price information for a contract and enables you to generate recurring expenses automatically
Distribution Cost [fm_distribution_cost]	Represents costs which can be divided among a group of records. For example, the cost of power at a datacenter which can be divided among the CIs in the datacenter.
Distribution Cost Rule [fm_distribution_cost_rule]	Determines how the costs are distributed to CIs.
Distribution Units [fm_distribution_units]	Stores the number of units to associate to configuration items linked to the current rate card
Expense Allocation [fm_expense_allocation]	Associates the value of an expense to a target reference. The value is generated from an expense line by processing allocation rules. The target is the record that is responsible for that expense amount. Common targets are cost centers, departments, companies, groups, and users.
Expense Allocation Rule [fm_expense_allocation_rule]	Determines how to process an expense line into an expense allocation. The logic starts by defining a table and condition to run against. Expenses linked to the selected table will be evaluated by this rule. If the condition is met, an allocation of a defined percentage is created for the reference defined by the allocation field value. Advanced scripts can also be used to define custom allocation generation.

Financial Management Log [fm_log]	Logs financial management information for tracking and to assist with debugging. Extends the system log table
Labor Rate Card [fm_labor_rate_card]	Defines hourly labor rates for expense line generation based on functional roles.
Rate Card [fm_rate_card]	Associates configuration items to a rate card.
Rate Card [fm_recurring_rate_card]	Represents a collection of recurring costs.
Rate Card Cost [fm_ci_rate_card_cost]	Associates a recurring CI cost to a rate card so that it is applied to all CIs associated with the rate card.
Rate Card Users [clm_m2m_rate_card_user]	Associates users to a rate card.
Relationship Path [fm_relationship_path]	Defines the relationship between configuration items, such as parent records and child records.
Task Rate Card [fm_task_rate_card]	Stores records that define task costs.

Properties

Cost Management adds the following properties.

Name	Description
com.snc.time_card.default_rate	Sets a default hourly rate to use if no labor rate cards apply to the user.
glide.cost_mgmt.calc_actual_cost	Sums all task expense lines and adds the total to the Work cost field on the task record when an expense line is created for any task with a Type of Planned task .
glide.cost_mgmt.debug	Enables debugging of cost management processing. All logging events are recorded in the Financial Management Log [fm_log] table. This should only be enabled during initial testing or when troubleshooting because it can generate a large number of log records.
glide.cost_mgmt.process_task_cis	Creates expense lines to affected configuration items when creating a task expense line. The default value is false starting with the Dublin release.
glide.cost_mgmt.service_allocation.method	Defines if business service to cost center allocation costs should be calculated based on total units or allocated units.

User Roles

Cost Management adds the following user roles.

Role	Contains Roles	Description
Financial Admin (financial_mgmt_admin)	financial_mgmt_user	Can create, write, and delete allocation units, fixed assets, depreciation, rate cards, distribution costs, expense lines, and expense allocations.
Financial User (financial_mgmt_user)	none	Can read allocation units and expense allocations. Can create, read, and write rate cards and expense lines. Can create, read, write, and delete fixed assets, depreciation, distribution costs.

UI Policies

Cost Management adds the following UI policies.

Name	Table	Description
Control flat rate vs bill rate fields	[fm_task_rate_card]	Hides the Task rate field and displays the Default labor rate field on the Task Rate Cards form if the Use time worked check box is selected.
Hide if define condition disabled	[fm_ci_rate_card]	Displays the Table and Condition fields on the CI Rate Cards form if the Define condition check box is selected.
Hide parent class if all enabled	[fm_relationship_path]	Hides the Parent class field on the Relationship Paths form if the All parent classes check box is selected.
Hide recurring fields for one time cost	[fm_distribution_cost]	Hides the End date and Interval fields on the Distribution Costs form if the Recurring check box is cleared.
Hide relationship type if all enabled	[fm_relationship_path]	Hides the Relationship type field on the Relationship Paths form if the All relationships check box is selected.
Hide Show Advanced Field	[fm_distribution_cost_rule]	Hides the Table and Condition fields on the Distribution Cost Rules form and displays the Script field if the Advanced check box is selected.
Hide table field	[fm_labor_rate_card]	Hides the Table field on the Labor Rate Cards form at all times.
Modify value field rules on distribution method	[fm_contract_rate_card]	Changes the Value field from read-only to mandatory on the Contract Rate Cards form if the Distribute cost field is set to Allocate and distribute cost based on value .
Show script field if advanced	[fm_expense_allocation_rule]	Displays the Script field on the Expense Allocation Rules form if the Advanced check box is selected.

Script Includes

Cost Management adds the following script includes.

Name	Description
CIRateCardUpdateAjax	Manages CI rate card configuration items.
ContractRateCardUtils	Filters available users or assets on a contract rate card based on the associated contract.
CostDemoUtil	Demonstrates and tests cost management functions.
ExpenseAllocator	Creates and manages expense allocation records.
FMCostProcessor	Creates and manages expense line records.
FMLogger	Contains logging methods for the Financial Management application.
FUtils	Contains utilities for the Financial Management application.
FMRelationships	Processes aggregate child expense lines to parent business services.
TaskRateProcessor	Processes task and labor rate cards.

Client Scripts

Cost Management adds the following client scripts.

Name	Table	Description
Calculate Tax Cost - Base cost	[fm_rate_card]	On the contract rate card record, calculates the tax cost and total cost based on changes to the base cost.
Calculate Tax Cost - Sales tax	[fm_rate_card]	On the contract rate card record, calculates the total cost if the Sales tax option is selected.
Calculate Tax Cost - Tax rate	[fm_rate_card]	On the contract rate card record, calculates the tax cost and total cost based on changes to the tax rate.
Set Rate Card End Date	[fm_contract_rate_card]	On the contract rate card record, sets the rate card end date to the contract end date if the contract has an end date. This client script is available starting with the Dublin release.

Business Rules

Cost Management adds the following business rules.

Name	Table	Description
Calculate Totals with Tax	[fm_recurring_rate_card]	Updates the Tax rate , Tax cost , and Total cost fields when Sales tax , Base cost , or Tax rate field values change.
Create expense from approved time card	[time_card]	Creates an expense line after a time card is approved.
fm_calcBudgetValues	[fm_budget]	Updates remaining budget amount when planned or actual values change.
fm_Disable rate card costs	[fm_ci_rate_card]	Disables all rate card costs when a rate card is disabled.
fm_InsertBudget	[fm_budget]	Shows a message with the next budget number when a new record is inserted.
fm_Populate Month Field	[fm_expense_allocation]	Fills in the Month field based on the Expense date field.
fm_processExpenseAllocation	[fm_expense_line]	Processes expense allocation rules when an expense line is created for pending items.
fm_Set default next process	[fm_ci_rate_card_cost]	Sets the default next process date for a new configuration item rate card cost.
fm_Set default next process	[fm_distribution_cost]	Sets the default next process date for a new distribution cost.
fm_updateAllocationAvailable	[allocation_unit]	Recalculates the number of available units when the number of allocated units is updated.
fm_updateAllocationUnits	[fm_cmdb_rel_cc]	Recalculates the number of allocated units for a business service.
Next process date validation	[fm_contract_rate_card]	If the next process date for the contract rate card is after the start date, this business rule sets the next date to the start date.
Prevent more than one allocation per ci	[allocation_unit]	Prevents more than one allocation per configuration item.
Process CI Relationships	[fm_expense_line]	Processes parent related items and generates expense lines for configuration item source expenses. Processes task cost into affected configuration item expense lines for task source expenses.
Process Task Rate Cards	[task]	Processes task rate cards when a task is set to inactive.
Update Contract	[fm_contract_rate_card]	Rolls costs from rate card to contract. Updates the contract total cost, tax cost, tax rate, and base cost when total cost, tax cost or tax rate values change.
Update Planned Task Actual Cost	[fm_expense_line]	Calculates the total actual costs from related expense lines for planned task source expenses.

Verify rate card's start and end dates	[fm_contract_rate_card]	<p>Validates that the rate card start date is specified and is not after the end date. Starting with the Dublin release, this business rule also:</p> <ul style="list-style-type: none"> Validates that the rate card start date is not before the contract start date and that the rate card end date is not after the contract end date. Sets the rate card end date to the contract end date if a value is not entered and the contract has an end date.
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Installed with Versions Prior to the Calgary Release

Click the plus to expand previous version information

Activating the plugin adds the Financial Management application to the navigation pane. The application contains modules for creating and managing cost features.

Legacy - Cost Management Homepage

The Cost Management homepage features the following reports:

- **Budgets**
- **Service Usage**
- **Service Capacity**
- **Cost Center Allocations**

Legacy - Tables

Cost Management adds the following tables:

Display Name [Table Name]	Description
Allocation Unit [allocation_unit]	Tracks capacity and usage for a business service. Stores reference to business service, total, allocated, and remaining units of capacity.
Budget [fm_budget]	Tracks planned and total expense allocation amounts for a collection of cost centers.
Budget Cost Center [fm_budget_cost_center]	Associates one or more cost centers to a budget.
CI Distribution Cost [fm_ci_dist_cost]	Stores the costs associated with a group of CIs. The costs can be distributed to all of the CIs according to CI distribution cost rules.
CI Distribution Cost Rule [fm_ci_dist_cost_rule]	Contains rules that determine how CI distribution costs are distributed to CIs.
CI Rate Card [fm_ci_rate_card]	Links configuration items and costs. A classification can also be defined to allow for multiple rate cards for a group of CIs.
CI Rate Cards [fm_rate_card_cmdb_ci_m2m]	Associates configuration items to a rate card.
Expense Allocation [fm_expense_allocation]	Associates the value of an expense to a target reference. The value is generated from an expense line by processing allocation rules. The target is the record that is responsible for that expense amount. Common targets are cost centers, departments, companies, groups, and users.
Expense Allocation Rule [fm_expense_allocation_rule]	Determines how to process an expense line into an expense allocation. The logic starts by defining a table and condition to run against. Expenses linked to the selected table will be evaluated by this rule. If the condition is met, an allocation of a defined percentage is created for the reference defined by the allocation field value. Advanced scripts can also be used to define custom allocation generation.
Expense Line [fm_expense_line]	Stores information about expense lines, including a link to the associated rate card. Contains the status and next scheduled processing date for the expense line.

Financial Management Log [fm_log]	Logs financial management information for tracking and to asset with debugging. Extends the system log table
Rate Card Cost [fm_ci_rate_card_cost]	Associates a recurring CI cost to a rate card so that it is applied to all CIs associated with the rate card.
Relationship Path [fm_relationship_path]	Defines the relationship between configuration items, such as parent records and child records.
Task Rate Card [fm_task_rate_card]	Stores records that define task costs.

Legacy - Properties

Cost Management adds the following properties:

- **com.snc.time_card.default_rate:** sets a default hourly rate to use if no labor rate cards apply to the user.
- **glide.cost_mgmt.calc_actual_cost:** sums all task expense lines and adds the total to the **Work cost** field on the task record when an expense line is created for any task with a **Type** of **Planned task**.
- **glide.cost_mgmt.debug:** enables debugging of cost management processing. All logging events are recorded in the Financial Management Log [fm_log] table. This should only be enabled during initial testing or when troubleshooting because it can generate a large number of log records.
- **glide.cost_mgmt.service_allocation.method:** defines if business service to cost center allocation costs should be calculated based on total units or allocated units.

Legacy - Scripts

Cost Management adds the following scheduled script jobs:

- **Process Last Month CI Costs:** processes all active rate card costs for the previous month and creates expense lines.
- **Process Last Month Distribution Costs:** processes all active distribution costs for the previous month and creates expense lines.
- **Update Budget Calculations:** recalculates budget amounts for all of the budget cost center's expense allocations.
- **CI Rate Card Item Review:** runs monthly to send the CI Rate Card Review email notification that reports on all CI rate cards with **define_condition** field set to true.

Legacy - Business Rules

Cost Management adds the following business rules:

- **Disable rate card costs [fm_ci_rate_card]:** disables all rate card costs when a rate card is disabled.
- **fm_updateAllocationUnits [fm_cmdb_rel_cc]:** recalculates the number of allocated units for a business service.
- **fm_updateAllocationAvailable [allocation_unit]:** recalculates the number of available units when the number of allocated units is updated.
- **fm_calcBudgetValues [fm_budget]:** updates remaining budget amount when planned or actual values change.
- **fm_processExpenseAllocation [fm_expense_line]:** processes expense allocation rules when an expense line is created.
- **fm_Set default next process [fm_ci_rate_card_cost]:** sets the default next process date for a new configuration item rate card cost.
- **fm_Set default next process [fm_distribution_cost]:** sets the default next process date for a new distribution cost.
- **fm_updateBudgetValues [fm_expense_allocation]:** updates the cost center's budget amount if cost center allocation changes.

- **fm_Populate Month Field [fm_expense_allocation]:** fills in the **Month** field based on the **Expense date** field.
- **Process Task Rate Cards [task]:** processes task rate cards when a task is set to inactive.

Legacy - Script Includes

Cost Management adds the following script includes:

- **CICostProcessor:** creates and manages expense line records.
- **DistributionCostProcessor:** processes distribution costs and rules to generate expense lines.
- **TaskRateProcessor:** processes task and labor rate cards.
- **ExpenseAllocator:** creates and manages expense allocation records.
- **ExpenseLine:** contains classes representing an expense line record.
- **FMLogger:** contains logging methods for the financial management application.
- **FMRelationships:** processes aggregate child expense lines to parent business services.
- **FMUtils:** processes aggregate child expense lines to parent business services.

Legacy - Security

Cost Management adds the following security roles:

- **financial_mgmt_admin:** Contains financial_mgmt_user role. Also has access to write and delete: allocation_unit, fm_budget, fm_distribution_cost_rule, fm_ci_rate_card, fm_expense_allocation, fm_expense_allocation_rule, fm_labor_rate_card, fm_task_rate_card, fm_relationship_path.
- **financial_mgmt_user:** Granted read access to all financial management tables. At least this role (or admin) is needed to access the tables in the Cost Management plugin. Users with the financial_mgmt_user role can also write the following records, fm_budget, fm_budget_cost_center, fm_ci_dist_cost, fm_ci_rate_card, fm_ci_rate_card_cmdb_ci_m2m, fm_ci_rate_card_cost, fm_cmdb_rel_cc, fm_distribution_units, fm_expense_line. Delete access is granted to fm_budget_cost_center, fm_ci_dist_cost, fm_ci_rate_card_cmdb_ci_m2m, fm_ci_rate_card_cost, fm_cmdb_rel_cc, fx_currency_instance, and fx_price.

Cost management also uses these roles.

- **itil:** Has write access to create fm_expense_line.
- **admin:** Has delete access on fm_expense_allocation, fm_expense_line, fm_log.

Legacy - Demo Data

Demo data is provided with the Cost Management plugin, and is documented in Cost Management Demo Data.

Overview Module



Note: This article applies to Fuji. For more current information, see *Cost Overview Module* ^[1] at <http://docs.servicenow.com> The ServiceNow Wiki is no longer being updated. Please refer to <http://docs.servicenow.com> for the latest product documentation.

Overview

The Cost Overview module displays various cost management gauges. It gives financial administrators and other users a summary view of key cost management information.

The Cost Overview is a type of homepage. For details about editing gauges on homepages, see Adding Existing Gauges to a Homepage.

Roles

Only users with certain roles have access to the Cost Overview module. The different levels of access are:

- **View:** can view the overview page and refresh gauges.
- **Customize:** can refresh, add, delete, and rearrange gauges.

Role	Access
admin	View, customize
asset	<ul style="list-style-type: none">• Dublin: View• Calgary: View, customize
financial_mgmt_admin	View, customize
financial_mgmt_user	<ul style="list-style-type: none">• Dublin: View• Calgary: View, customize
procurement_admin	<ul style="list-style-type: none">• Dublin: View• Calgary: NA (role does not exist)
procurement_user	<ul style="list-style-type: none">• Dublin: View• Calgary: View, customize
sam	<ul style="list-style-type: none">• Dublin: View• Calgary: View, customize

Using the Cost Overview Module

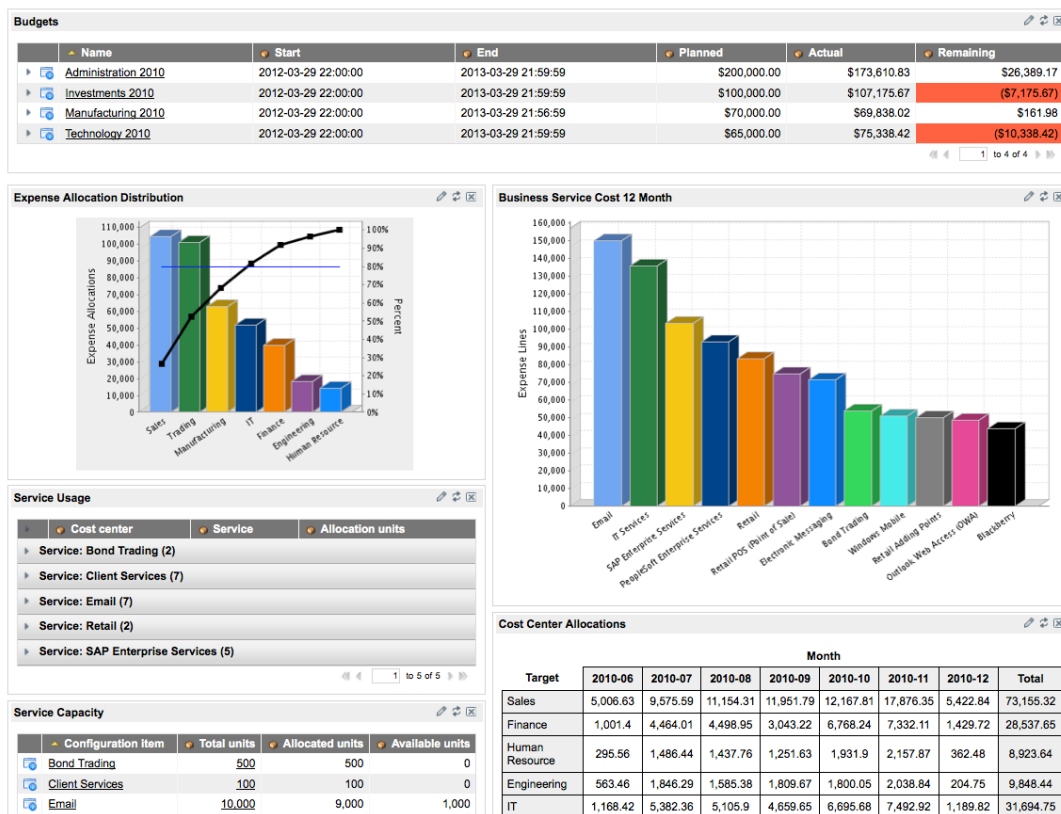
To use the Cost Overview module:

1. Navigate to **Financial Management > Cost Overview**.
2. Click elements within the gauges to obtain more information.

[Add content >](#)

Cost Management

[Refresh](#): Off [Change Layout >](#)



References

- [1] https://docs.servicenow.com/bundle/jakarta-it-business-management/page/product/cost-management/concept/c_CostOverviewModule.html

Financial Management



Note: This article applies to Fuji and earlier releases. For more current information, see *Financial Management* ^[1] at <http://docs.servicenow.com> **The ServiceNow Wiki is no longer being updated. Visit <http://docs.servicenow.com> for the latest product documentation.**

Overview

With the Financial Management application, you can allocate, track, and report on expenses in your organization. The application provides a workbench, which is a visual tool that you can use to extract expenses from your general ledger, process the expenses, and map them to the functions used by IT. You also have access to a variety of reports to help you know exactly how much of your expenditures are related to IT.

The Financial Management application is available starting with the Fuji release.



Note: The modules in the Financial Management application prior to the Fuji release are now included with Cost Management.

How Financial Management Works

The Financial Management applications uses these components:

- **The general ledger:** a list of your organization's expenses.
- **The fiscal period:** the timeframe during which expenses were incurred. You can work with only one fiscal period at a time.
- **Your cost model:** the rules, methods, and metrics that tell the application how to allocate expenses to the accounts in the IT chart of accounts.
- **The allocation engine:** the core of the application that uses your cost model to calculate expenses and determine how to allocate expenses.
- **Financial reports and dashboards:** graphical representations of the expense allocations that show you where your expenses are coming from.

With the workbench, you can manage your general ledger, choose the fiscal period, build your cost model, and run the allocation engine.

Integration with PPS

If you activate the Financial Management plugin, the Project Portfolio Suite (PPS) is also activated. PPS includes these applications:

- Project Management
- Demand Management
- Test Management
- Resource Management
- Software Development Lifecycle (SDLC)

You cannot activate Financial Management without also activating all of these applications and their components, including tables, business rules, roles, and menus and modules.

The PPS applications install several menus and modules to the application navigator, such as Project and SDLC (Scrum Process). If you do not intend to use any of these applications, or if you want to hide any of these from your users, see [Enabling and Disabling Application Menus or Modules](#).

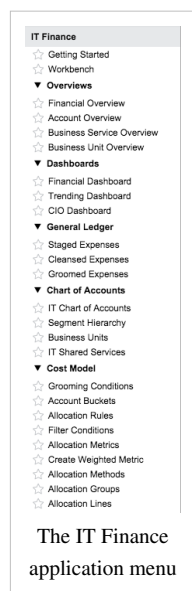
Roles

The Financial Management application uses the following roles.

Role Title [name]	Description
financial management administrator [financial_mgmt_admin]	Sets up and administers the entire cost model, which includes the general ledger and the items used in the allocation process, like rules, methods, metrics, and so on. Creates, modifies, and deletes allocation lines, fiscal periods, and reports.
financial management user [financial_mgmt_user]	Views general ledger records and allocation records for reporting purposes.
financial analyst [financial_analyst]	Uses the workbench to allocate expenses. Modifies the cost model. Creates, edits, and deletes financial reports.
data mart administrator [data_mart_admin]	Creates, modifies, and deletes records in the data mart. Creates dimension tables that can be used as a segment, so that financial management administrators and analysts can add the segments to the IT chart of accounts.

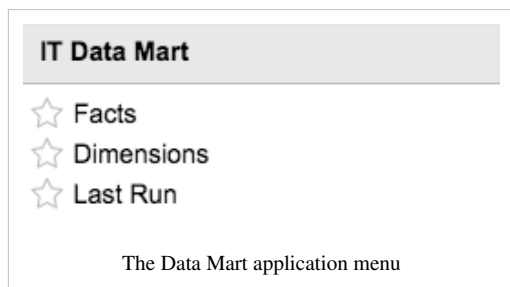
Menus and Modules

Activating the Financial Management feature adds the **IT Finance** and **IT Data Mart** application menus. It also adds modules for fiscal periods to the **System Definition** application menu.



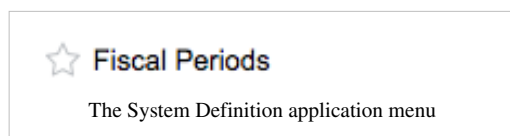
- **Getting Started:** Access the documentation to help you get started with the application.
- **Workbench:** Open the workbench, which is a user-friendly interface that you can use to manage expense data in the general ledger, set up the cost model, and perform allocations.
- **Overviews**
 - **Financial Overview:** View reports that show costs per fiscal period for each segment in the IT chart of accounts.
 - **Account Overview:** View reports that show allocations for the accounts in all segments.
 - **Business Service Overview:** View reports that show allocations for business services.
 - **Business Unit Overview:** View reports that show allocations for business units.
- **Dashboards**

- **Financial Dashboard:** View the main financial management dashboard that shows allocations for selected segments.
- **Trending Dashboard:** View reports that shows allocation data for each segment over time.
- **CIO Dashboard:** View a report that gives CIOs a quick summary of finances operations, and projects.
- **General Ledger**
 - **Staged Expenses:** Access the list of the expenses that you imported into the application.
 - **Cleansed Expenses:** Access the expenses that you already cleansed in the workbench.
 - **Groomed Expenses:** Access the expenses that are already groomed, assigned to buckets, and ready for allocation.
- **Chart of Accounts**
 - **IT Chart of Accounts:** Access the definitions that specify the segments used by your cost allocation method.
 - **Segment Hierarchy:** Access the records that control the hierarchy of segments in the IT chart of accounts.
 - **Business Units:** Access the business units that are associated with companies. By default, the business unit is the first segment in the IT chart of accounts.
 - **IT Shared Services:** Access the services that are shared across your IT infrastructure.
- **Cost Model**
 - **Grooming Conditions:** Access advanced query conditions that the workbench uses during the Bucketing stage.
 - **Account Buckets:** Access the buckets that you can use in the workbench to group expenses.
 - **Allocation Rules:** Access all cost allocation rules used to allocate expenses.
 - **Filter Conditions:** Access records that allocations rules use to filter the expenses that can match allocation rules.
 - **Allocation Metrics:** Access the metrics that rules and methods use to allocate expenses.
 - **Create Weighted Metric:** Create a new weighted metric.
 - **Allocation Methods:** Access the methods that cost allocation rules use to allocate expenses.
 - **Allocation Groups:** Access the groups you can use to classify allocations.
 - **Allocation Lines:** Access the expense lines that have been allocated from expenses in the general ledger.



Under the **IT Data Mart** menu:

- **Facts:** Opens a list of fact definitions.
- **Dimensions:** Opens a list of dimension table definitions.
- **Last Run:** Opens the records showing the most recent time that the application created dimension tables.



Under the **System Definition** menu:

- **Fiscal Periods:** Opens a list of all fiscal period records and calendar records.

Activating Financial Management

An administrator can activate Financial Management .

Click the plus to expand instructions for activating a plugin.

If you have the admin role, use the following steps to activate the plugin.

1. Navigate to **System Definition > Plugins**.
2. Right-click the plugin name on the list and select **Activate/Upgrade**.

If the plugin depends on other plugins, these plugins are listed along with their activation status.

3. [Optional] If available, select the **Load demo data** check box.

Some plugins include demo data—sample records that are designed to illustrate plugin features for common use cases. Loading demo data is a good policy when you first activate the plugin on a development or test instance. You can load demo data after the plugin is activated by repeating this process and selecting the check box.

4. Click **Activate**.

Dependencies

The following application plugins are activated with Financial Management:

- Fiscal Calendar
- Financial Management Data Mart
- Project Portfolio Suite

Requirements

The following are required to use Financial Management:

- For all financial overview and dashboard reports to function properly, Report Charting v2 must be activated on your instance.
- If you are using Internet Explorer, you must use version 11 or later to use the workbench and version 8 or later to use the allocation viewer. You can also use any of the other generally supported web browsers.

References

- [1] https://docs.servicenow.com/bundle/jakarta-it-business-management/page/product/it-finance/concept/c_ITFinance.html

Managing CI Rate Cards

Overview

A configuration item (CI) rate card is a group of recurring configuration item costs associated with multiple configuration items. Rate cards make it easier to enter and track costs that are the same across multiple configuration items.

Rate cards usually follow a framework in which all costs are recorded and allocated. For example, the contract costs of a specific model server in a New York datacenter could be different than the same server model running in a London datacenter. Each model would have a separate rate card detailing the costs.

Users with the Financial Admin (financial_mgmt_admin) and Financial User (financial_mgmt_user) roles can manage CI rate cards.

Creating a CI Rate Card

1. Navigate to **Financial Management > Cost Management > CI Rate Cards**.
2. Click **New**.
3. Fill in the fields, as appropriate.

Field	Description
Number	[Read-only] The CI rate card identification number. Automatically assigned. (This field is available in Calgary and later releases.)
Define condition	Check box that indicates whether to use the Condition field to filter configuration items for the rate card.
Name	The CI rate card name.
Summary type	The CI rate card category: Grow Business , Run Business , or Transform Business . Categorizing can be useful for reporting.
Active	Check box that indicates whether the rate card is available for use. Clear the check box to disable the rate card and deactivate all associated rate card costs.
Table	The table to query with conditions for configuration items. This field is available if Define condition is selected.
Condition	The condition to query on the specified Table . This field has a condition count widget to preview what records are captured by the conditions. This field is available if Define condition is selected.
Short Description	A brief description of the rate card

Adding a Condition to a CI Rate Card

If you are adding a condition to a CI rate card, use the **Update CI List** related link to create the relationship between the configuration item or items and the rate card.

1. Navigate to **Financial Management > Cost Management > CI Rate Cards**.
 2. Select a rate card.
 3. Select **Define condition**.
 4. Create the **Condition**.
 5. Right-click the header bar and select **Save**.
 6. In **Related Links**, click **Update CI List**.
-

CI Rate Card - CIRC0010001

Allows for the modification of CI Rate Card Items based on the defined condition.

Possible Actions:

- Replace - will remove any existing items that do not match the condition and add all remaining items from the condition results
- Merge - will keep existing items and add all remaining items from the condition results

[Return to rate card](#)

Existing items not matching condition

Name	Manufacturer	Location	Description	Class	Updated	Maintenance schedule
------	--------------	----------	-------------	-------	---------	----------------------

Rate card condition items not yet in rate card

<< 1 to 5 of 5 >>

Name	Type	Category	Version	Class
EXCH-SD-05	Microsoft Exchange			Email Server
EXCH-SD-07	Microsoft Exchange			Email Server
EXCHANGE-NY-02	Microsoft Exchange			Email Server
IronMail-SD-01	Microsoft Exchange			Email Server
IronMail-SD-02	Microsoft Exchange			Email Server

7. Click one of the following:

- **Replace:** removes any existing items that do not match the condition and adds all remaining items from the condition results.
- **Merge:** keeps existing items and adds all remaining items from the condition results.

8. Click **Return to rate card**.

CI Rate Card Costs

CI rate card costs generate expense lines for configuration items on the associated rate card. Costs associated with rate cards are stored in the Rate Card Cost (fm_ci_rate_card_cost) table. Each cost is applied to every configuration item associated with the rate card when the costs are processed.

Expense Line is active by default.

Adding a Configuration Item Rate Card Cost

1. Navigate to **Financial Management > Cost Management > CI Rate Cards**.
2. Select a rate card.
3. In the **Rate Card Costs** related list, click **New**.
4. Enter a **Start date**.
5. Fill in the fields, as appropriate.

Field	Description
Number	[Read-only] The rate card cost identification number. Automatically assigned.
Rate card	The identification number of the rate card to which this rate card cost is associated.
Name	The rate card cost name.
Active	Check box that indicates whether to enable cost processing for this cost.
Short description	A brief description of the rate card cost. The description is used to identify the processed cost on an expense line record.
Start date	The date the cost should start being processed.
End date	The date the cost should stop being processed.
Interval	The frequency at which the rate card cost recurs.
Recurring	Check box that indicates whether the cost is a repeating cost. Also sets generated expense lines to show as recurring. If this check box is cleared, no further expenses are generated automatically.
Sales tax	Check box that indicates whether to apply sales tax to the cost. (This field is available in Calgary and later releases.)
Tax rate	The tax rate to apply to the cost.
Order	Used by task rate cards.
Last processed	[Read-only] The date and time this cost was last processed.
Next process	The next date on which new expenses will be processed based on the Process FM Costs scheduled job.
Base cost	The amount that must be paid before taxes.
Tax cost	Total cost of the tax.
Total cost	Total rate card cost, including taxes.
Description	Detailed description of the rate card cost.

Removing a Rate Card Cost

1. Navigate to **Financial Management > Cost Management > CI Rate Cards**.
2. Select a rate card.
3. In the **Rate Card Costs** related list, click a **Number**.
4. Click **Delete**.

Disabling a Rate Card Cost

To prevent a cost from processing, clear the **Active** option. Use the option to make a rate card cost permanently inactive or to temporarily skip a cost from processing.

1. Navigate to **Financial Management > Cost Management > CI Rate Cards**.
2. Select a rate card.
3. In the **Rate Card Costs** related list, click a **Number**.
4. Clear the **Active** check box.

Modifying a Rate Card Cost

Configuration item costs often change over time as facilities or vendor rates change. Expense lines are the snapshot of a given interval's costs, so changing the cost does not affect already generated expense lines. When costs change, either modify the cost amount or disable the current cost and create a new cost to represent the cost going forward. The changes are processed in the next generated expense line. To keep historical records of costs, create new costs rather than modifying existing ones and set the end date of the disabled cost to show that the cost agreement expired.

1. Navigate to **Financial Management > Cost Management > CI Rate Cards**.
2. Select a rate card.
3. Click a rate card cost **Number**.
4. Modify the fields, as necessary.

Processing CI Rate Cards

A scheduled job called **Process FM Costs** automatically processes CI rate cards daily and performs the following actions (starting with the Calgary release):

- Generates expense lines on CI rate cards that have a next process date within the previous day.
- Generates expense lines for the configuration item's parents. For more information, see [Aggregating CI Costs](#).
- Calculates and sets the *next process* date for recurring costs.
- Updates the *last processed* date and time for the cost.

Logging Processing Activity

To troubleshoot processing of rate cards, enable debug logging of all processing activity.

1. Navigate to **Financial Management > Admin > Properties**.
2. Select the **Enable debugging of the cost management processing** option.
3. Click **Save**.

Aggregating CI Costs

Expense lines can be aggregated to apply all configuration item expenses to a parent business service or application with relationship paths. Define relationship paths from a child configuration class to one or many parent classes. If a path does not match one of the relationship path record criteria, the path is not viewed as a relationship when determining expense aggregations.

Enabling Relationship Aggregation

The **Process Last Month CI Costs** scheduled job processes costs of configuration items. To start aggregating expenses to parents, identify the relationships to use for aggregation. Because there are many options for CMDB relationships, using all available paths for aggregation is generally not efficient.

You can have multiple relationships for each child class. For example, to enable only certain relationships or parent classes, create a new record for each type and class combination paired with the child class.

When an expense line is generated from a configuration item cost, the parents of the configuration item are evaluated. The parent class and relationship type are compared to the list of relationship path records to see if there is a match to use for aggregation. If there is a match, an expense line is generated for the parent configuration item. The process repeats for all parents until there are either no parent relationships or the relationships in place do not meet the criteria defined in the relationship path records.

For a relationship path example, see [Cost Management Demo Data](#).

1. Navigate to **Financial Management > Admin > Relationship Paths**.
2. Click **New**.
3. Fill in the fields, as appropriate.

Field	Description
Active	Check box that indicates whether the relationship path is enabled.
Child class	The child configuration item class. This class is the source of the expense generated during configuration item cost processing.
All parent classes	Check box that indicates whether relationships to all parent classes are processed.
Parent class	A valid parent CI class for the selected child class. Available only if All parent classes is selected.
All relationships	Check box that indicates whether all relationship types between the child and parent classes are processed.
Relationship type	The type of relationship to process between the child and parent classes. Available only if All relationships is selected.

Determining Aggregation Amount

When a configuration item has multiple parents that have valid relationship paths, the amount aggregated to each parent is split to prevent over-aggregation of a item cost. When evaluating parent relationships to active relationship paths, the aggregation counts the total number of valid relationships. The expense line amount from the child configuration item is evenly divided among the number valid paths and that amount is used when creating the inherited expense line for the parent.

Managing Task and Labor Rate Cards



Note: This article applies to Fuji and earlier releases. For more current information, see *Task and Labor Rate Cards* ^[1] at <http://docs.servicenow.com> **The ServiceNow Wiki is no longer being updated. Visit <http://docs.servicenow.com> for the latest product documentation.**

Overview

In Cost Management, task rate cards and labor rate cards capture operating costs by generating expense lines representing the cost of performing a task.

- *Task rate cards* are templates used to define the type of task and the method of calculating the associated costs.
- *Labor rate cards* are templates used to define worker's labor rates when calculating task cost based on time worked.

Managing a Task Rate Card

To define a task rate card, navigate to **Financial Management > Task Rate Cards** and create or edit a record (see table for details).

Field	Input Value
Name	String field summarizing the purpose of the rate card.
Table	Which type of tasks the rate card applies to.
Order	If more than one task rate card apply to the same task, the one with the lowest order is used.
Active	Check box which determines if the rate card will be actively used.
Summary type	High-level type of expense for easier summary reports. This value will be used to set the expense line summary type field.
Condition	Filter to run on the table selected to determine whether this rate card applies to a given task. This field uses the Condition Count Widget to preview what records would be returned by the conditions.
Task rate	Rate of the task, with a currency drop-down. To add a new currency, use the Edit link.
Use time worked	By default a flat rate per task is defined in the rate card. Selecting the check box will force the rule to calculate the task cost based on the related task time worked entries.
Default labor rate	Defines the default hourly rate to apply to the time worked entries if the worker does not have a labor rate card. Displayed when Use time worked is selected.

Managing a Labor Rate Card

To define a labor rate card, navigate to **Financial Management > Labor Rate Cards** and create or edit a record (see table for details).

Field	Input Value
Name	String field summarizing the purpose of the rate card.
Rate code	For reference use only, if you want to align rates with an external system.
Active	Check box which determines if the rate card will be actively used.
Hourly rate	Identifies the hourly rate to be applied to task time worked entries if the worker meets the condition defined.
Condition	Defines a filter on the user table to determine whether the task time worked user applies to this rate card. This field uses the Condition Count Widget to preview what records would be returned by the conditions.

Processing Task Rate Cards

The business rule **Process Task Rate Cards** runs when tasks close and checks to see if any task rate cards apply. If they do, an expense line is created according to the rate card.


The process flow of the "Process Task Rate Cards" business rule is:

1. Task closes.
2. Business rule runs.
3. Query active task rate cards in order looking for a matching condition.
4. Qualifying rate card not using time worked.
 1. Generate expense line linked to the task using the task rate value.
5. Qualifying rate card using time worked.
 1. Get task time worked entries for the task grouped by user (worker).
 2. For each user, check to see if they match conditions in any of the labor rate cards.
 1. Labor rate card found, generate expense line using the time worked and labor rate.
 2. Labor rate card not found, generate expense line using the default labor rate from the task rate card.

References

[1] https://docs.servicenow.com/bundle/jakarta-it-business-management/page/product/cost-management/concept/c_TaskAndLaborRateCards.html

Using Budgets and Cost Centers



Functionality described here requires the **Cost Management** plugin.

Overview

Budgets allow tracking of planned and actual IT spending. Budgets are defined for a given time period for one or more cost centers. Cost Centers are used to represents a business entity. All expense allocations assigned to the budget's cost center during the budget period will used to calculate the budget's actual expense allocations.

Managing Budgets

A Budget can be defined by navigating to **Financial Management > Budgets** and selecting a Budget to edit or selecting **New**.

Fields

Field	Input Value
Number	System generated record number
Name	String field for the name of the budget.
Start	Date field defining the beginning of the budget period.
End	Date field defining the end of the budget period.
Planned	Currency field representing the planned amount of expenses for the associated cost centers during the budget period. This value is inputted or imported.
Actual	Currency field representing the actual amount of expenses for the associated cost centers during the budget period. This is a calculated field using the list of expense allocations for the cost centers.
Remaining	Currency field representing the amount of planned minus actual expenses. This is a calculated field.
Projected	Currency field representing the estimated amount of expenses for the associated cost centers during the budget period. An average daily expense amount is calculated and applied to the rest of the budget period to determine the estimated projection.

Related Records

In addition to the Budget record, Budgets are related to the following record. These can be viewed as related lists on the Budget form.

- **Cost Centers** - This related list displays the cost centers that are a member of this budget.
- **Expense Allocations** - This list is a defined related list designed to show all of the expense allocation records during the budget time period for all of the budget's cost centers.

Managing Cost Centers

A Cost Center can be defined by navigating to **Financial Management > Cost Centers** and selecting a Cost Center to edit or selecting **New**.

Related Records

The cost center table is not new to this plugin, however this plugin does add new related list to the cost center form.

- **Budgets** - This related list displays the budgets that this cost center is a member of
- **CI Cost Center Relationships** - This list is used to define how much of a business service capacity the cost center is consuming. See Allocation Based on Usage.
- **Expense Allocations** - This list is a defined related list designed to show all of the expense allocation records with this cost center as the target.

Managing a Budget's Cost Centers

To add or remove cost centers from a budget:

- Open an existing budget from the **Financial Management > Budgets** module.
- Make sure the Cost Centers related list is displayed.
- Use the Edit to add or remove existing cost centers from the budget. Use the New button to create a new cost center record.

It is also possible to assign a cost center to a budget from the cost center record. The cost center form will have a budgets related list.

Using Distribution Costs and Rules

Overview

Distribution Costs are costs which can be divided among a group of records. For example, the cost of power at a datacenter which can be divided among the CIs in the datacenter.

Distribution Rules determine how the Distribution Costs are divided among the CIs.

Defining Distribution Costs

To define new distribution costs, navigate to **Financial Management > Cost Management > Distribution Costs**, and select **New**. Populate the following fields:

Field	Input Value
Number	A system-generated unique identifier for the Distribution Cost.
Name	A human-readable identifier for the cost.
Amount	The amount of the cost, with a currency drop-down. To add a new currency, use the Edit link.
Distribution Rule	Select a Distribution Rule to determine how the costs are distributed to CIs. For more information, see Distribution Rules.
Active	Determines if the cost is actively used.
Start Date	The date of the cost, or if the cost is recurring, the first date of the cost.
Recurring	If checked, the cost will recur, and will be added regularly.
End Date	If Recurring is true , the last date to add the distribution cost.
Summary Type	Identifies a high-level type of expense for easier summary reports. This value will be used to set the expense line summary type field.
Interval	If Recurring is true , the time between each addition of the distribution cost between Start Date and End Date .
Last Processed	A read-only display of the last time the distribution cost was processed.
Next Process	A read-only display of the scheduled next process date.

Defining Distribution Rules

To define new distribution rules, navigate to **Financial Management > Admin > Distribution Cost Rules**, and select **New**. Populate the following fields:

Field	Input Value
Name	A unique name for the rule.
Active	Determines if the rule is actively used.
Advanced	If checked, the distribution rule will be determined by script. If not checked, it will be determined by table and conditions.
Description	A description of the rules and any notes on its use.
Script	If Advanced is true , the script which will determine the rule's behavior.
Table	If Advanced is false , a drop-down list of tables to find the records to distribute the cost to.
Condition	If Advanced is false , a Condition Builder to determine which records will receive the distributed cost, on the table determined by the Table field. Cost amount will be distributed evenly across the records identified by the table and condition values. This field uses the Condition Count Widget to preview what records would be returned by the conditions.

Once submitted, the **Distribution Costs** related list will appear to determine which costs will be distributed according to the rules.

Scripted distribution

Scripted distributions allow for custom distribution amounts, versus the evenly split distributions when using table and condition filters.

To enable scripted processing on a distribution rule:

- Check the advanced field check box, this will display the script field.
- Build the script using the following concepts:
 - Query for target records and data to use for calculating the allocation amount.
 - Create expense line records using the DistExpenseLine API.

As noted in the default script, when the advanced field is enabled, the following variables are available during the script processing:

- **distCost** - GlideRecord for the distribution cost, allowing access to all fields.
- **distCostAmount** - cost amount in the system currency.

To create an expense line record, use the DistExpenseLine API

```

/* Available variables:
 *   distCost - GlideRecord for the distribution cost
 *   distCostAmount - cost amount in system currency
 *
 * To create an expense line record use the DistExpenseLine API
 *   var DistExpense = new DistExpenseLine(distCost);
 *   DistExpense.createExpense(expenseSourceGlideRecord, amount,
description);
 *   createExpense returns true if expense was inserted;
 */

/*
 * Sample Script to distribute a cost to departments based on number of
 *   active users in each department
 */
//get the total cost from the distCost
var deptUsers = new GlideRecord("sys_user");

```

```
deptUsers.addActiveQuery();
deptUsers.addQuery("department", "!=", "");
deptUsers.query();
var totalUsers = deptUsers.getRowCount();

//get the count of users for each department
var deptUsers = new GlideAggregate("sys_user");
deptUsers.addActiveQuery();
deptUsers.addQuery("department", "!=", "");
deptUsers.groupBy("department");
deptUsers.addAggregate("COUNT");
deptUsers.query();

//for each department calc amount and create expense line
while(deptUsers.next()) {
    var dept = deptUsers.department.getRefRecord();
    var deptCount = deptUsers.getAggregate("COUNT");
    var deptAmount = distCostAmount / deptCount;

    //create expense line
    var DistExpense = new DistExpenseLine(distCost);
    DistExpense.createExpense(dept, deptAmount, distCost.name + "-" +
    distCost.distribution_rule.getDisplayValue());
}
```

Processing Distribution Costs

A scheduled job called **Process FM Costs** automatically processes distribution costs daily (starting with the Calgary release).

Using Business Services with Expenses

Overview

Manage the relationships between business services and their expenses with allocation units and cost centers.

Business Service Allocation Units

Allocation unit records define the capacity and usage of a business service. To define them, navigate to **Financial Management > Allocation Units** and select a record to edit or select **New**.



Note: *Selecting the name of the configuration item will display the CI record, not the Allocation Units.*

Field	Description
Configuration Item	Select the Business Service to define allocation units for.
Total Units	The total number of units of expense available to allocate. A unit is a generic measurement which can represent anything. Should match the cost center relationship unit. What units represent can be recorded in the Unit Type field. Note that using the Total units option may result in unallocated expenses if there are unallocated business service units. Using the Allocated unit option always results in 100% expense allocations.
Allocated Units	How many of the total units are allocated. Populated by script.
Available Units	How many of the total units are unallocated. Populated by script.
Updated	When the units were last updated.
Fields which can be added by configuring the form:	
Unit Type	Used to record what the units represent (e.g. seats, licenses, Gigabytes, etc.).

Cost Center Consumption of Business Services

Cost centers are a commonly used reference between financial systems and IT. Cost center records represent business entities, and have a related list of CI Cost Center Relationships that measure the cost center's consumption of business services.

Cost centers and their CI relationships are defined by navigating to **Financial Management > Cost Centers** and selecting a record to edit or selecting **New**.

Field	Description
Name	A unique name for the cost center.
Account Number	An account number associated with the cost center, if one exists.
Code	A code associated with the cost center, if one exists.
Location	A reference to the location of the cost center.
Manager	A reference to the user who manages the cost center.
Valid from	The date that the cost center is valid from.
Valid to	The date that the cost center is valid to.
Related List: CI Cost Center Relationships	
Service	A reference to a Business Service.
Cost Center	The cost center to apply the relationship to. If reached through the related list, it should already be related to the appropriate cost center.
Allocation Percentage	<i>Feature not yet implemented.</i>
Allocation Type	A choice list. Should be Units .
Allocation Units	The number of units that the cost center is using. This is measured using the same type of unit used to define the total capacity of the business service in the allocation unit record. This number will be used to update the number of allocated units in the allocation unit record. It will also be used to determine the amount of expenses to allocate to the cost center based on the percentage of business service used versus the total capacity.

Default Allocation Rule

For every expense line generated for a business service, the default allocation rule **Process Svc-CC Relationships** will attempt to process the expense and create allocations for each cost center that is consuming the service.

The amount of the expense allocation is calculated by dividing the number of units the cost center is consuming by the total number of units for the business service. This calculation method is referred to as "all unit" allocation as it uses the total unit capacity to determine the allocation percentage.

Refer to the demo walk-through for a detailed example.

For a given business service expense line, it is typical that less than 100% of the expense would be allocated using this method not all units have been allocated to cost centers. The unallocated expenses could be considered IT overhead. Some organizations prefer to show 100% expense allocation regardless of how many units are in use. This method is referred to as "allocated unit" since the percent of allocation calculated by dividing the number of units the cost center is consuming by total number of allocated units from all cost centers.

Allocation
calculation method

Example

all_units	Service supports 100 units but only has 50 units allocated, and cost center ABC is allocated 25 units. This method will result in an allocation cost of 25/100, or 25% of the total cost of the service. 50% of the expenses (from the 50 unallocated units) will not be allocated.
allocated_units	Service supports 100 units but only has 50 units allocated, and cost center ABC is allocated 25 units. This method will result in an allocation cost of 25/50, or 50% of the total cost of the service. 100% of the expenses will be allocated, showing full cost recovery.

This is a system wide setting that can be configured by navigating to **Financial Management > Properties** module and selecting an option from the choice list.

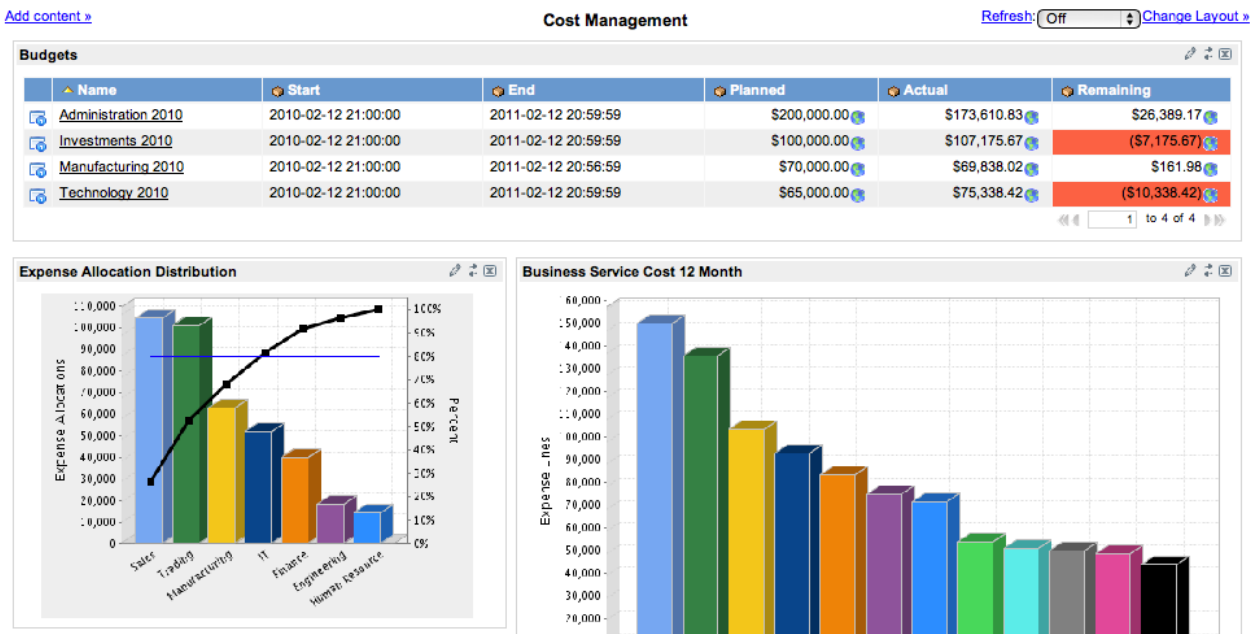
Cost Management Demo Data

Overview

The demo data available with Cost Management provides samples of the data types to illustrate its use. Demo data should be loaded only in a development or test instance to prevent conflict with production data.

High-Level Data Review

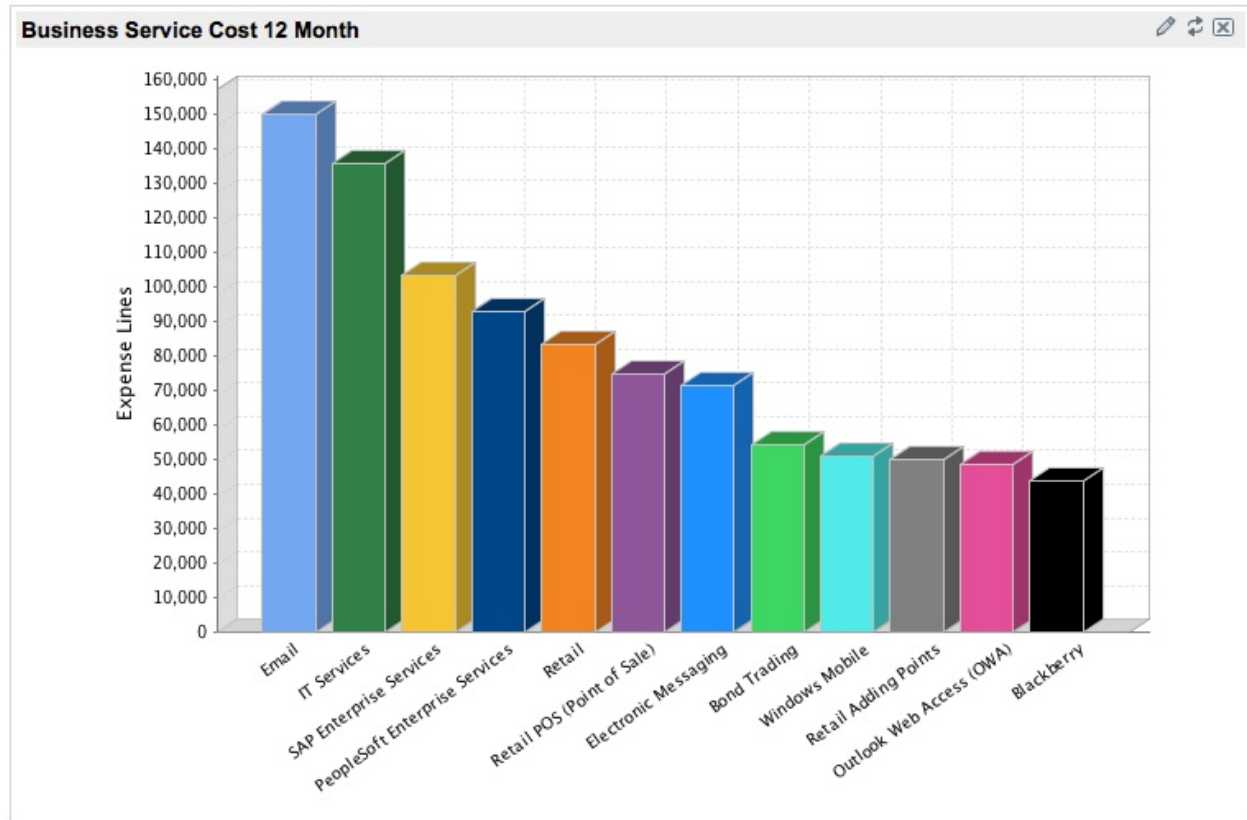
The Cost Overview module has a number of commonly requested reports.



Business Service Overview

The business service owner would like to know how much it costs to maintain the service over some period of time. This requires gathering the dependent CI costs and representing them at the business service level. For CI costs to roll up to business services, relationships must exist between CIs and services.

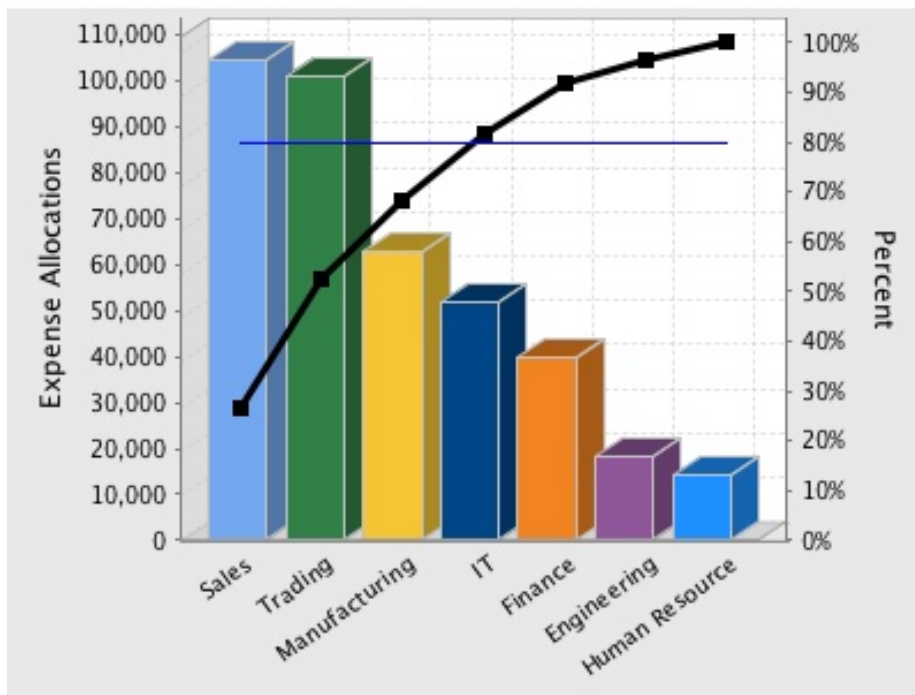
The demo data contains a number of services that have costs from their dependent CIs. In the **Cost Overview** homepage, the **Business Service Cost 12 Month** gauge shows an overview of this information:



Allocation Overview

Expense allocation rules costs allow you to allocate costs to one or more business entities such as a user, group, department, company, or cost center. The purpose of the allocation is to represent the cost that the business is responsible for. This is not considered charge-back or billing, but could be used as a source for billing. The primary purpose of expense allocation is to represent the consumer of the process that has incurred some expense.

The following diagram shows the distribution of expenses to cost centers.



Budget Overview

The amount of money allocated to cost centers can be tracked against a planned budget. A budget represents a collection of cost centers, a duration, and the amount of money that is expected to be allocated to the cost centers during that period. The administration budget contains three cost centers and has incurred \$173,610.83 so far during this period.

Budget		Planned:		Actual:		Remaining:	
Number:	BDGT0001001		200,000.00		\$173,610.83		\$26,389.17
Name:	Administration 2010						
Start:	2010-01-27 00:00:00						
End:	2011-01-26 23:59:59						

Cost Centers	New	Edit...	Go to	Cost center	1	to 3 of 3
Budget = Administration 2010						
Cost center						
<input type="checkbox"/>	Sales					
<input type="checkbox"/>	Finance					
<input type="checkbox"/>	Human Resource					
<input type="checkbox"/>	Actions on selected rows...					1 to 3 of 3

Cost Sources

There are a several ways to generate expense lines for objects in the system. These are generally classified as one of three types:

- CI costs
- Task costs
- Custom generated costs - these are not covered in the demo data, refer to the ExpenseLine API for more information.

In this case, there are two extra UNIX servers that are not in the rate card. Use the **Merge** button to add them. The rate card now shows nine items.



Note: Counts may vary if there are additional CIs in the instance.

The **Rate Card Costs** related list displays the recurring costs that all of the servers will incur, in this case on a monthly basis.

Adding the **Expense Line** related list to the CI Rate Card form shows the list of expense lines that have been generated from this rate card's costs. Here are the expenses for the *Server backup services* for two of the servers:

Expense Lines									
Number	Inherited	Parent	Date	Short description	Cost ID	Source ID	Amount	Type	Summary type
EXP9006635	false		2010-04-18	Server backup services (unix200)	Rate Card Cost: CRCC9000003	UNIX Server: unix200	\$1,200.00	Recurring	Run Business
EXP9006636	false		2010-04-18	Server backup services (unix201)	Rate Card Cost: CRCC9000003	UNIX Server: unix201	\$1,200.00	Recurring	Run Business

Distribution Costs

For more generic bulk costs that are generated by multiple CIs, distribution costs can represent the broader costs where individual CI rate cards do not apply. Navigate to **Financial Management > Distribution Costs** to view a few examples.

Select **Datacenter Facilities (amort)** from the list:

Distribution Cost * Required field		Update	Delete
Number:	DST9000004	Start date:	2010-02-09
Name:	Datacenter Facilities (amo)	Recurring:	<input checked="" type="checkbox"/>
Amount:	5,500.00 \$ Edit	End date:	2021-02-08
Distribution rule:	All Installed Servers View	Interval:	Monthly
Summary type:	Run Business	Last processed:	2010-12-09 19:00:00
Active:	<input type="checkbox"/>	Next process:	2011-01-09
Update Delete			

In this example, the datacenter's power costs for a month have been amortized and represented as a monthly recurring distribution cost.

This bulk cost should be distributed to all servers evenly to enable reporting on costs per server and cost center. This is accomplished with the **Distribution Rule** listed on the cost's form. To view the distribution cost, click the reference icon for the **All Installed Servers** rule in the **Distribution rule** field:

Distribution Cost Rule * Required field		Update	Delete
Name:	All Installed Servers		
Active:	<input checked="" type="checkbox"/>		
Advanced:	<input type="checkbox"/>		
Description:	Distribute a cost across all servers evenly with status of installed		
Table:	Server [cndb_ci_server]		
Condition:	Status(install_status) is Installed		
Update Delete			
Related Links View Condition Results			

This rule takes the \$5,500 and distributes it to each of the servers that match the rule condition. The condition here is *All servers with install status of installed*. The [View Condition Results](#) **related link displays the current records matching the condition**.

Task Costs

Task-related activity can also generate expense lines to track the costs associated with processing tasks. The primary method of generating task-related costs is to use **Task Rate Cards**.

Task Rate Cards

A task rate card is a condition-based record that the system uses to determine how to calculate the costs of a task.

To view an example, navigate to **Financial Management > Task Rate Card** and select **Incident P1**:

Task Rate Card

Name:Incident P1

Order:100

Table:Incident [incident]

Active:☐

Summary type:Run Business

Use time worked:☐

Task rate:150.00 \$ Edit

Condition:Priority is 1 - Critical

Update

Delete

Rate cards are processed whenever a task is closed. This processing is triggered by a business rule. The rate card contains the following information:

- When an incident with priority **1 - Critical** is closed, it generates an expense line for \$150.
- This is a flat rate defined for each P1 incident.

The **Expense Line** related list displays the list of expenses that have been created by this rate card.

Return to the **Task Rate Card** list and open the **Change Request (emergency)** rate card:

Task Rate Card

Name:Change Request (emergency)

Order:100

Table:Change Request [change_request]

Active:☐

Summary type:Run Business

Use time worked:☒

Default labor rate:250.00 \$ Edit

Condition>Type is Emergency

Update

Delete

This rate card for emergency change requests demonstrates an example of creating a task cost based on the amount of time it took to work the task, instead of the flat rate model in the incident rate card.

- The **Use time worked** flag in the rate card tells the system to use the task time worked records associated with the task when determining the task cost.
- Processing this rate will:
 - Query the list of task time worked records for the task.
 - Attempt to resolve an hourly rate for the user in the task time worked record (see Labor Rate Cards, below), or use the default rate of \$250/hr defined in the rate card.
 - Generate an expense line for each time worked entry.

The **Expense Lines** related list shows the expenses generated from this rate card.

Labor Rate Cards

Labor rate cards are a way to define common patterns for hourly worker rates so rates don't need to be managed for each individual in the system.

To view the sample rates, navigate to **Financial Management > Labor Rate Cards** and select the **Development** rate card:

The screenshot shows a 'Labor Rate Card' form. The 'Name' field is set to 'Development'. The 'Rate code' is 'DEV1'. The 'Active' checkbox is checked. The 'Hourly rate' is '100.00 \$'. The 'Condition' is set to 'Department is Development'. There are 'Update' and 'Delete' buttons at the bottom.

The conditions state that for users in the **Development** department, time worked costs will use \$100 as the hourly rate.

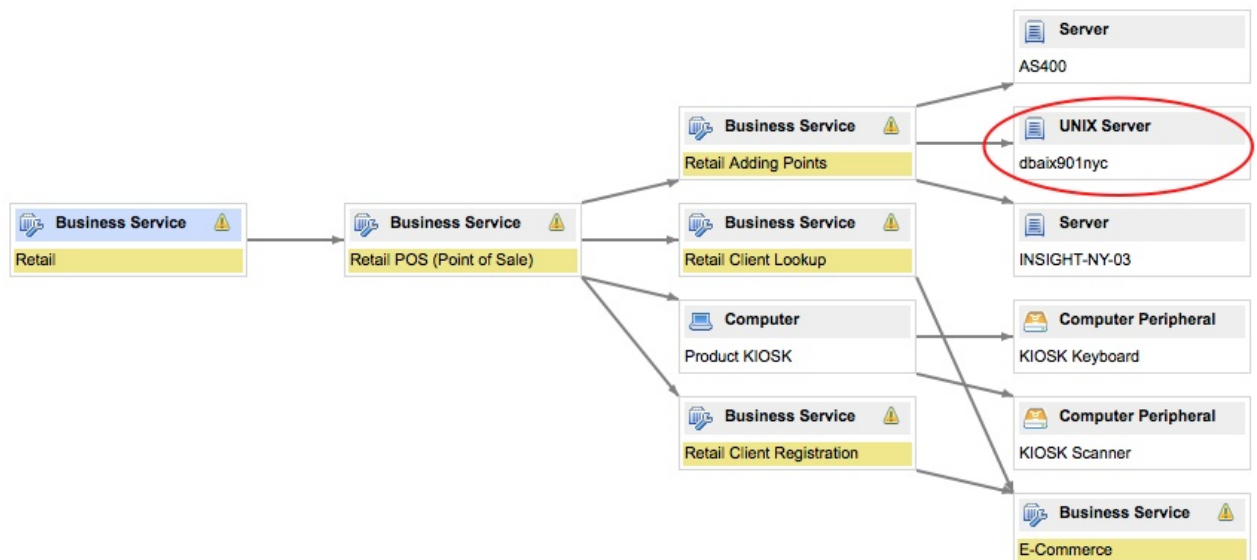
CI Relationships

Associating CIs to Business Services

To get reports that represent the total costs for a business service, there must be some association between the service and the CIs that make up the service. This is done with CI relationships.

To review the Retail business service:

1. Navigate to **Financial Management > Business Services**.
2. Select **Retail**.
3. View the business service map.



This view shows that the **dbaix901nyc** server is a dependency of the **Retail Adding Points**, **Retail POS**, and **Retail** business services. So whenever the server incurs a cost, it should be represented at each of the business services.

As seen above, the **dbaix901nyc** server is a member of the **Sun E20K Servers NY** CI rate card, so the expenses already exist for the server.

To view them:

1. Navigate to **Financial Management > CI Rate Cards**.
2. Select **Sun E20K Servers NY**.
3. View the **Expense Line** related list.

4. Filter the related list for **short description contains dbaix901nyc**.

The server's expenses are now visible:

Expense Lines										
Expense Lines > Short description contains dbaix901nyc										
	Number	Inherited	Parent	Date	Short description	Cost ID	Source ID	Amount	Type	Summary type
	EXP9006956	true	EXP9006955	2010-12-20	Server Monitoring 24x7 (dbaix901nyc)	Rate Card Cost: CRCC9000004	Business Service: Retail	\$750.00	Recurring	Run Business
	EXP9006955	true	EXP9006954	2010-12-20	Server Monitoring 24x7 (dbaix901nyc)	Rate Card Cost: CRCC9000004	Business Service: Retail POS (Point of Sale)	\$750.00	Recurring	Run Business
	EXP9006954	true	EXP9006953	2010-12-20	Server Monitoring 24x7 (dbaix901nyc)	Rate Card Cost: CRCC9000004	Business Service: Retail Adding Points	\$750.00	Recurring	Run Business
	EXP9006953	false		2010-12-20	Server Monitoring 24x7 (dbaix901nyc)	Rate Card Cost: CRCC9000004	UNIX Server: dbaix901nyc	\$750.00	Recurring	Run Business

This example contains one direct expense (**inherited = false**), and three inherited expenses that have been generated from other direct expenses. These inherited expenses are based on CI relationships, which allow for reporting at any business service level.

For more information on expense aggregation, see Enabling Relationship Aggregation.

Allocating Expenses

Expenses can also be allocated to a business entity that is responsible for the expense. This is not considered charge-back or billing but could be used as a source for billing. The primary purpose of expense allocation is to represent the consumer of the process that has incurred some expense. This can be accomplished by defining expense allocation rules.

Simple Example

This example demonstrates allocating every server-related expense line to the department responsible for the server.

To view the example:

1. Navigate to **Financial Management > Expense Allocation Rules**.
2. Remove the list filter to view inactive rules as well as active ones.
3. Select the **Server - Department** rule.

Expense Allocation Rule				Update	Delete	↑	↓
Name:	Server - Department			Active:	<input type="checkbox"/>		
Table:	Server [cmdb_ci_server]			Percentage:	100		
Allocation field:	Department			Summary type:	None		
Inherited:	<input checked="" type="checkbox"/>						
Condition:	<div> <div>Status[install_status]</div> <div>is one of</div> <div> <div>Absent</div> <div>In Maintenance</div> <div>In Stock</div> <div>Installed</div> </div> </div>						

The rule states that for every expense line associated (**Expense source** field) with a server that has one of the selected statuses, generate an expense location record for 100% of the expense amount and assign the allocation to the server's department.

To view expense allocations, add the **Expense Allocation** related list to the form. The **Target** field is the business unit that the expense is allocated to.

Expense Allocations						
Allocation rule = Server - Department						
	Number	Date	Month	Target	Short description	Amount
	EXPA9004601	2010-02-09	2009-12	Department: Sales	Server monthly lease (SAP LoadBal01)	\$8,500.00
	EXPA9004612	2010-03-12	2010-01	Department: Sales	Server monthly lease (SAP LoadBal01)	\$8,500.00
	EXPA9004628	2010-04-09	2010-02	Department: Sales	Server monthly lease (SAP LoadBal01)	\$8,500.00
	EXPA9004634	2010-05-10	2010-03	Department: Sales	Server monthly lease (SAP LoadBal01)	\$8,500.00
	EXPA9004650	2010-06-09	2010-04	Department: Sales	Server monthly lease (SAP LoadBal01)	\$8,500.00

Complex Example

A more common example would be to allocate the costs of a business service to the business consumers. Since cost centers are generally used when referring to business finances, this example allocates business service costs to each cost center that is consuming the service and bases the amount allocated on the amount of the service the cost center consumes.

To view the example, navigate to **Financial Management > Business Services** and select **Retail**. Switch to the **Cost** view to gain access to additional related lists.

The **Allocation Units** record defines the amount of capacity that this service provides. In this case, the Retail service can support 50 locations (units), of which 45 are allocated. A unit is a generic concept that can represent something that makes sense for that business service. This record uses units to represent allocation. The objective is to use the unit count and the cost center unit count to determine a percentage of total to calculate the allocation amount.

Allocation Units ▾ **New** Go to **Total units** 1 to 1 of 1

► Configuration item = Retail

	Total units	Unit type	Allocated units	Available units
<input type="checkbox"/>	50	Locations	45	5
<input type="checkbox"/> Actions on selected rows... <input type="text"/>				

1 to 1 of 1

The **CI Cost Center Relationships** list shows which cost centers are using the service and how many units they are using. This information is used to determine how much of the service expenses to allocate to each cost center. For example, the **Trading** department is using 10 of the 50 allocated units, so they will be allocated 20% of all Retail expenses. There's also an option to allocate based on the total (10 or 45), see the `glide.cost_mgmt.service_allocation.method` property.

CI Cost Center Relationships ▾ **New** Go to **Cost center** 1 to 2 of 2

► Service = Retail

	Cost center	Allocation units
<input type="checkbox"/>	Sales	35
<input type="checkbox"/>	Trading	10
<input type="checkbox"/> Actions on selected rows... <input type="text"/>		

1 to 2 of 2

To see how the expense lines are allocated, select an entry in the **Expense Lines** related list and add the **Expense Allocation** related list to the Expense Line form.

The following is an expense from the **dbaix901nyc** server for \$2,500. Two expense allocations are generated from the expense. The **Trading** cost center was allocated \$500 (20%) of the expense based on the CI cost center relationship seen earlier.

Expense Line [Cost view] Update Delete ⌵ ⌶ ⌷

Number: Current View: Cost (click me for other views) Amount: 2,500.00 \$ Edit

Date: 2010-11-10 📅 Process date: 2011-01-02 18:47:26 📅

Cost ID: Rate Card Cost: CRCC9000005 🔍 Inherited: ☒ 🔍

Source ID: Business Service: Retail 🔍 Parent: EXP9007088 🔍

State: Processed ⌵

Short description: SAN Storage (dbaix901nyc)

Type: Recurring ⌵

Update Delete

Expense Lines New Go to Date 🔍

Parent = EXP9007089

Number	Inherited	Date	Short description	Cost ID	Source ID	Amount	Type	Summary type
							Total	

Expense Allocations New Go to Number 🔍

Expense line = EXP9007089

Number	Month	Target	Short description	Amount	Summary type
EXPA9003395	2010-10	Cost Center: Sales	SAN Storage (dbaix901nyc)	\$1,750.00	Run Business
EXPA9003396	2010-10	Cost Center: Trading	SAN Storage (dbaix901nyc)	\$500.00	Run Business

Actions on selected rows... 1 to 2 of 2

This type of business-service-to-cost-center allocation is accomplished through the **Process Svc-CC Relationships** expense allocation rule. This is an advanced rule that uses script to determine the allocation logic.

Budgets and Cost Centers

The most common business entity to associate financial information to is the cost center. The example above showed how cost centers can be allocated expenses based on service usage. This example will use that information to compare with a defined budget for the cost centers.

A budget is a placeholder for an amount of planned spending for one or more cost centers. To view an example, navigate to **Financial Management > Budgets** and select the **Investments** budget:

Budget Required field Update Delete ⌵ ⌶ ⌷

Number: BDGT0001002 Planned: 100,000.00 \$ Edit

Name: Investments 2010 Actual: \$107,175.67

Start: 2010-02-09 00:00:00 📅 Remaining: (\$7,175.67)

End: 2011-02-08 23:59:59 📅

Update Delete

Cost Centers New Edit... Go to Cost center 🔍

Budget = Investments 2010

Cost center
Trading

Actions on selected rows... 1 to 1 of 1

Expense Allocations New Go to Number 🔍

Expense Allocations

Number	Date	Month	Target	Short description	Amount	Expense line	Allocation rule
EXPA9003300	2010-04-18	2010-03	Cost Center: Trading	Server backup services (unix201)	\$1,080.00	EXP9006637	Process Svc-CC Relationships
EXPA9003302	2010-04-18	2010-03	Cost Center: Trading	Server backup services (dbaix901nyc)	\$240.00	EXP9006652	Process Svc-CC Relationships
EXPA9003304	2010-05-19	2010-04	Cost Center: Trading	Server backup services (unix201)	\$1,080.00	EXP9006656	Process Svc-CC Relationships

This budget has a defined start and end date, planned amount, and actual amount. In the **Cost Center** related list, note that **Trading** is a member.

For all expense allocations assigned to the **Trading** cost center during the budget time periods, the allocations will be totaled to populate the actual budget field. The related expense allocation records can also be viewed in the **Expense Allocations** related list.

API Reference

ExpenseLine API

Overview

The ExpenseLine API is included with the Cost Management Plugin as a script include record. It is used by various cost management processes and can also be used for generating expense line (fm_expense_line) records from your own server-side scripts.

Methods

Method Summary	
Return Value	Details
ExpenseLine	initialize (GlideRecord source, Decimal amount, <i>String</i> description, <i>GlideRecord</i> costSource) Instantiates new ExpenseLine object
	setCostSource (GlideRecord costSource) Identifies the source rate card or distribution cost that was the source of expense line generation. This is not the source (CI, task) of the expense.
	setDescription (String description) Defines the a description of the expense
	setRecurring (boolean recurring) Flags the expense as recurring by setting the recurring field to true
	setParent (GlideRecord expense) Sets the parent field on the expense line. This is generally only used by the system when generating indirect expenses such as business service aggregated expenses
	setSummaryType (String summaryType) Sets a value for the expense line summary_type field
boolean	createExpense () Creates the expense line record based on the parameters provided
	processCIParents () Used internally by the createExpense method to process CI relationships when the expense source is a cmdb_ci type record.

initialize

`initialize(GlideRecord source, Decimal amount, String description, GlideRecord costSource)`

Instantiates a new ExpenseLine object with basic required expense line data.

Parameters:

`GlideRecord source` - Required GlideRecord identifying the source of the expense

`Decimal amount` - Required Decimal identifying the amount of the expense

`String description` - *Optional description of the expense*

`GlideRecord costSource` - *Optional GlideRecord identifying the source record that generated the expense line. This is generally only used for system generated expense lines (CI rate card, distribution costs, and task rate card processing)*

Returns:

ExpenseLine object

setCostSource

`setCostSource(GlideRecord costSource)`

Identifies the source rate card or distribution cost that was the source of expense line generation. This is not the source (CI, task) of the expense.

Parameters:

`costSource` - GlideRecord of CI rate card cost, distribution cost, or task rate card. This is generally only used for system generated expense lines.

setDescription

`setDescription(String description)`

Defines the a description of the expense.

Parameters:

`description` - Description of expense.

setRecurring

`setRecurring(boolean recurring)`

Flags the expense as recurring by setting the `recurring` field to true. Expense lines are set to false by default so there is no need to call `setRecurring(false)`.

Parameters:

`recurring` - true to identify expense line as a recurring expense

setParent

setParent(GlideRecord expense)

Sets the `parent` field on the expense line. This is generally only used by the system when generating indirect expenses such as business service aggregated expenses.

Parameters:

`expense` - parent expense line record

setSummaryType

setSummaryType(String summaryType)

Sets a value for the expense line `summary_type` field.

Parameters:

`summaryType` - Typically you would set it to a value already specified in the expense line summary type field choice list

createExpense

createExpense()

Creates the expense line record based on the parameters provided.

Returns:

`boolean` true if the expense line was successfully created

processCIParents

processCIParents()

Used internally by the `createExpense` method to process CI relationships when the expense source is a `cmdb_ci` type record.

Example

```
//get some random CI to be used as an expense source
var ci = new GlideRecord("cmdb_ci_server");
ci.query();
ci.next();

//create expense line
var exp = new ExpenseLine(ci, 234.56, "Test expense line");
exp.setSummaryType("run_business");
var success = exp.createExpense();
gs.print("Successful? " + success);
```

ExpenseAllocation API

Overview

The ExpenseAllocation API is included with the Cost Management Plugin as a script include record. It is used by various cost management processes and can also be used for generating custom expense allocation records (fm_expense_allocation) from scripted expense allocation rules.

Methods

Method Summary	
Return Value	Details
ExpenseAllocation	initialize (GlideRecord expense, GlideRecord rule) Instantiates new ExpenseAllocation object, this is not needed if scripting advanced allocation rules. This object is already available as allocation variable.
boolean	createAllocation (GlideRecord target, Decimal amount) Creates an expense allocation record

initialize

`initialize(GlideRecord expense, GlideRecord rule)`

Instantiates a new ExpenseAllocation object with basic required allocation data. Called when using *new ExpenseAllocation()*.

Parameters:

GlideRecord source - Required GlideRecord identifying the source of the expense

Decimal amount - Required Decimal identifying the amount of the expense

String description - *Optional description of the expense*

GlideRecord costSource - *Optional GlideRecord identifying the source record that generated the expense line. This is generally only used for system generated expense lines (CI rate card, distribution costs, and task rate card processing)*

Returns:

ExpenseLine object

createAllocation

`createAllocation(GlideRecord target, Decimal amount)`

Creates an expense allocation (fm_expense_allocation) record referencing the parameters provided during instantiation and this method.

Parameters:

GlideRecord target - GlideRecord target of the allocation, for example a cost center record to allocate an expense to

Decimal amount - the amount of the allocation

Returns:

boolean true if the expense line was successfully created

Example

```
var allocation = new ExpenseAllocation(expenseGlideRecord,  
ruleGlideRecord);  
allocation.createAllocation(costCenterGlideRecord, 2345.67);
```

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