Lab Guide

Optimize Your

Resource Allocation 202

Karlo Parulan & Brett Hamilton

Default Login / Password:

admin / Knowledge16

itil / Knowledge16

employee / Knowledge16

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Lab Goal

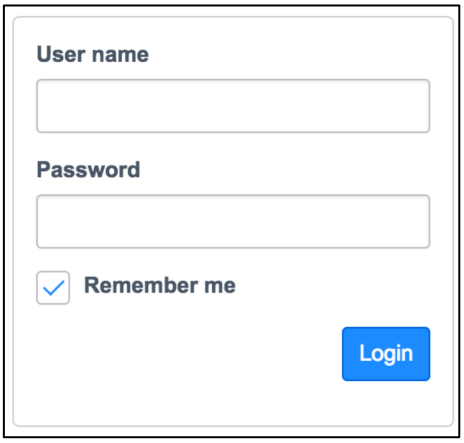
Lab 1.0
Team Setup

Before exploring Resource Management, we set up foundation data to be used throughout the lab. This data setup includes creating a team with group members, schedules, skills and rate cards.

- Set up schedules and skills
- Set up the team
  - Group and Hourly Rate
  - Group Members
  - Rate Cards

Log on to Your Training Instance and Set Your Schedule

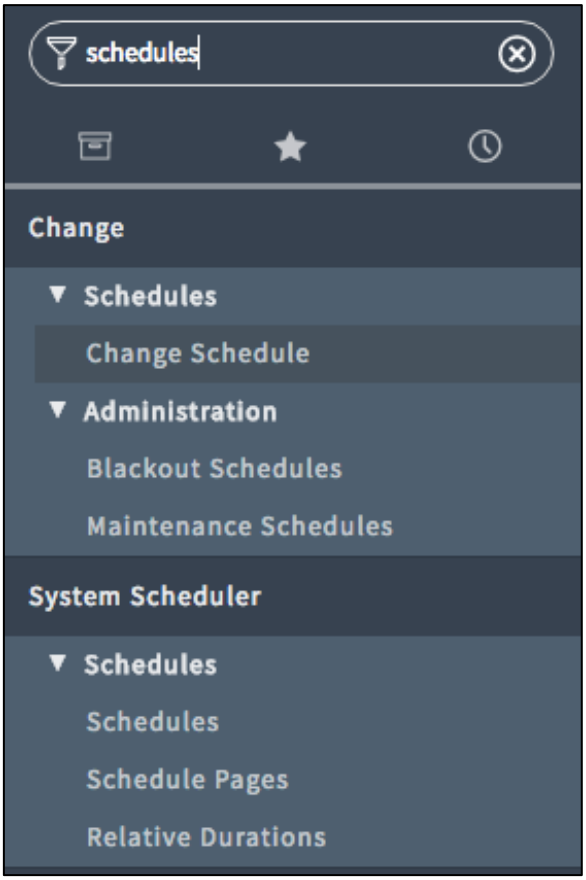
1. Navigate to the unique instance URL provided.



2. Log in with the provided administrator credentials.

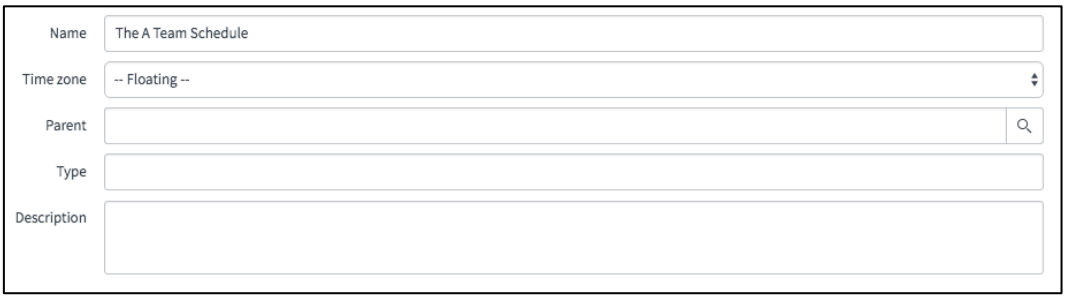
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3. Navigate to **Schedules** under **System Scheduler > Schedules**.



4. Click **New**.

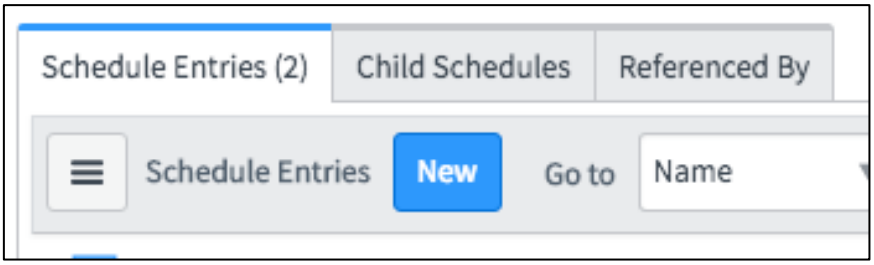
5. Enter **The A Team Schedule** for **Name** and keep **Time zone** as **Floating**. Floating means that the time is relative to who is logged in. Right-click on the top bar to **Save**.



Note: An error message stating **no Schedule Entries** should appear at the top. Ignore this.

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6. Navigate to the **Schedule Entries** related list and click **New**.



7. Enter the following field information:

   Name: **Regular Hours**
   Type: **– None –**
   Show as: **Free**
   When: **Today's date at 09:00:00**
   To: **17:00:00**
   Repeats: **Every Weekday (Mon-Fri)**
   Repeat until: **2016-06-30**

8. Click **Submit** to save.

9. You return to the Schedules form. Click the **Show Schedule** related link to display the schedule you created in a Daily, Weekly or Monthly view.

10. Create another schedule entry for Independence Day.

    Name: **Independence Day**
    Type**: Excluded**
    Show as: **Busy**
    When: **2016-07-04** and **tick All Day**
    Repeats: **Yearly (until 2020)**

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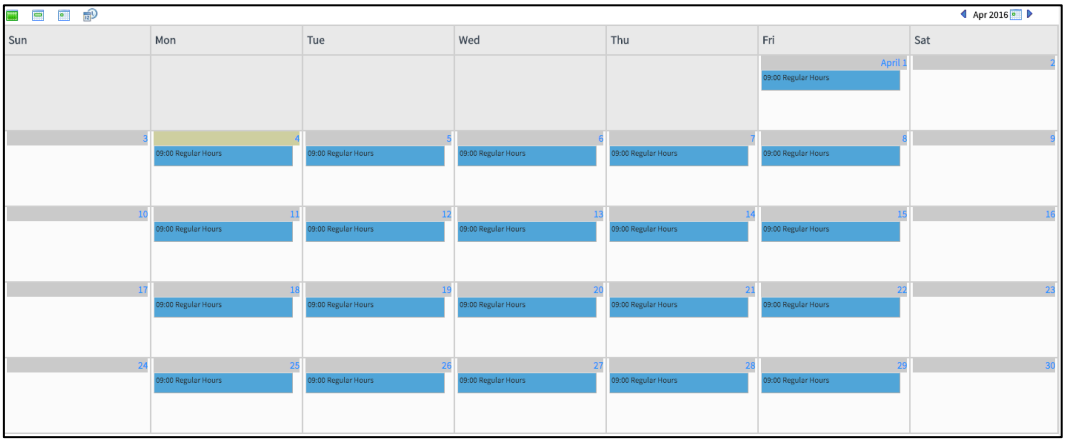
11. **Submit** to save. The Schedule Entries are saved and should look like the example.



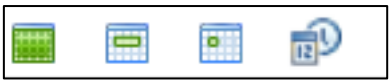
12. Click on the related link **Show Schedule** to open a calendar view of the schedule.



13. A calendar view displays the schedules just created. Navigate to July to see the Independence Day entry.



You can change the view using the icons at top left.



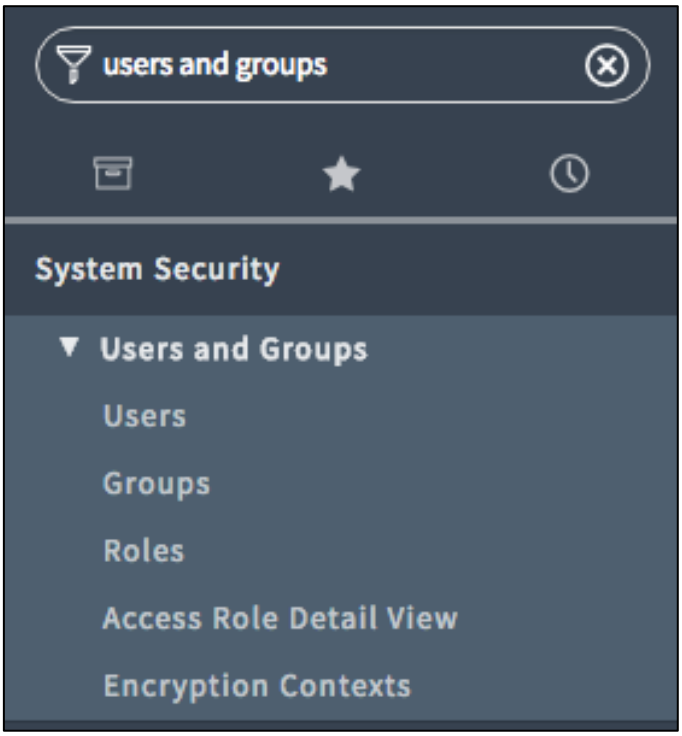
What did you notice about the Thanksgiving entry? Was it easy to determine if it was available time or if the time was busy?

We will see how the Independence Day Schedule Entry is excluded in available time in a later lab.

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Set Up the Team

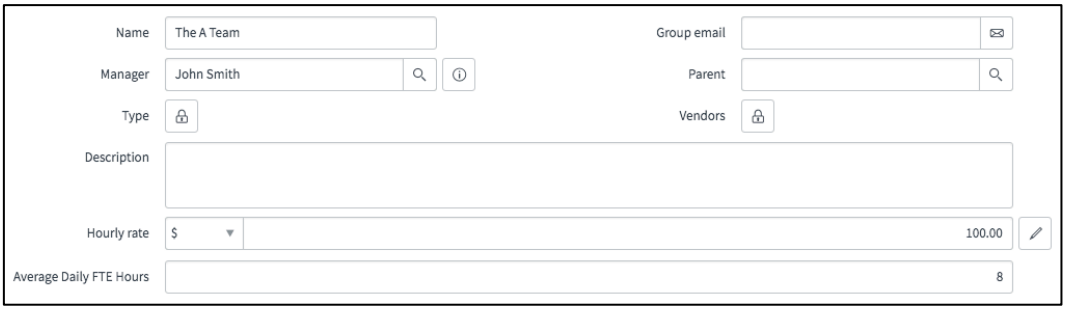
1. Search for users and groups in the Navigation filter. Select **Groups** under **System Security**.



2. Click **New** at the top of the table.

3. Enter **The A Team** for the Group Name and an Hourly Rate of **$100** (used as a default hourly rate for all staff). Right-click on the top bar to **Save**.

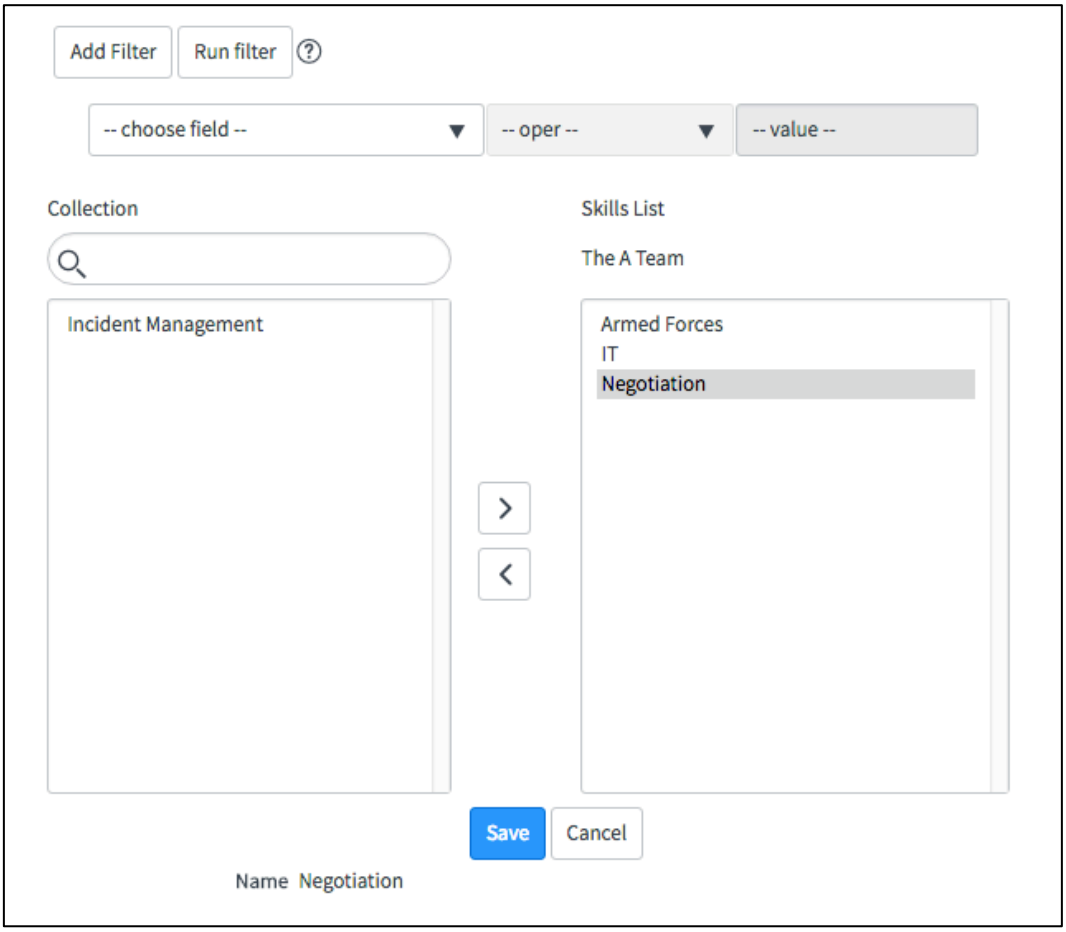
4. Set the Average Daily FTE Hours to **8**. If no value is provided, the default property is 8 hours.



5. Right-click header of record and click **Save**.

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6. Click **Edit** in the Skills list.
7. Add **IT, Armed Forces** and **Negotiation**. Be sure to click **Save**.

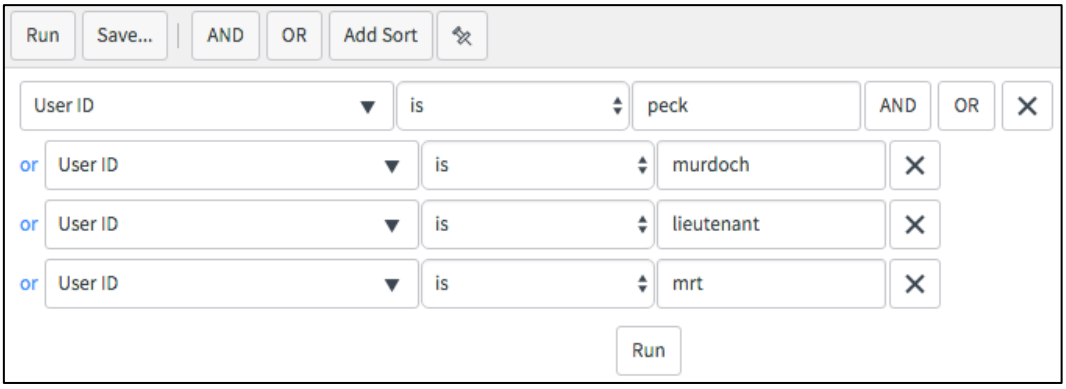


8. Click **Edit** on the Group Members list.
9. Add the following people to The A Team Group: **Mr. T**, **Lieutenant John Smith**, **Templeton Peck** and **HM Murdock**.

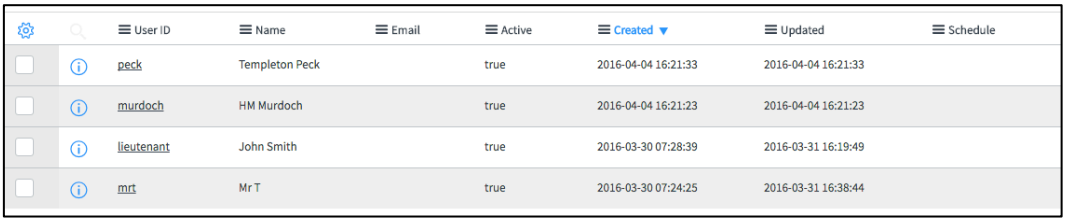
   Note: These users were set up for this Resource Management lab.
10. Click the **Users** module in the Navigation list.

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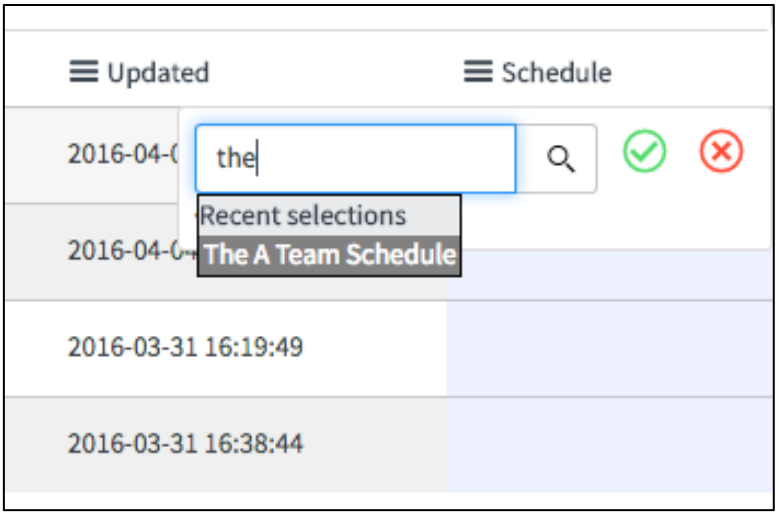
11. Create a filter that looks like the following:



12. **Run** the search.



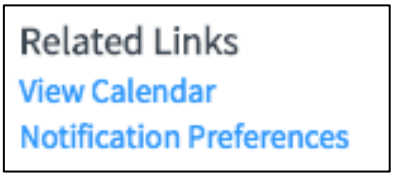
13. Update all records with the same Schedule by highlighting all rows under the Schedule column. Then double-click in one cell and find **The A Team Schedule**. Press **Return**.



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Note: By default, all users and groups follow the "Resource Management Schedule," Monday through Friday 8 to 12, 1 to 5. Users can adjust the schedule in the Properties Module of the Resource Management Application. Individual users can adjust which schedule they adhere to in their User profile as just demonstrated.

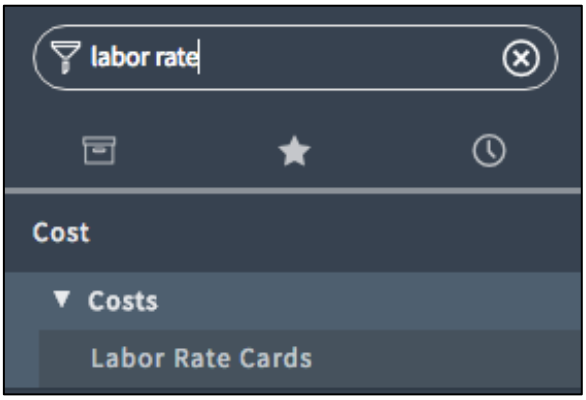
14. Open Mr. T's user record and click on the related link **View Calendar**.



15. The calendar view will show that Mr. T is available from 9am to 5pm Monday to Friday (white in color). Navigate to Thanksgiving, and this day will not be available (grey in color).

Set Up Rate Cards

1. Navigate to **Labor Rate Cards** under Cost.

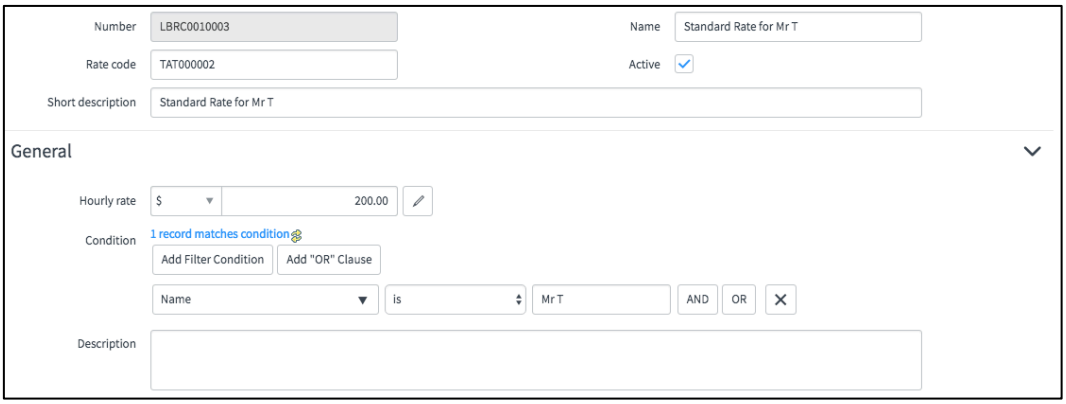


2. Click **New** to create a new record.

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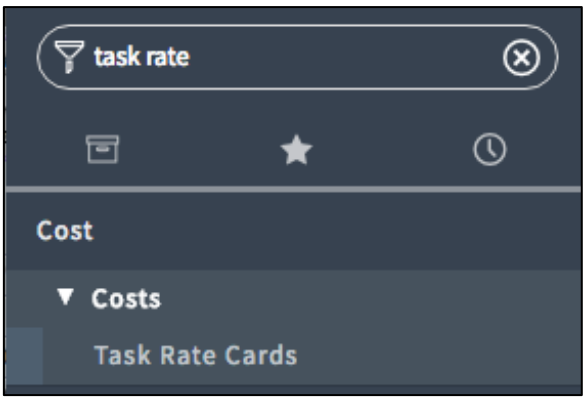
3. Enter the following information:

   Rate Code: **TAT000001**
   Name: **Standard Rate for Mr. T**
   Hourly Rate: **$300**
   Condition: **Name is Mr. T**



4. Click **Submit**.

5. Navigate to **Task Rate Cards** under Cost. Rate cards are used when it comes to recording actual effort and time spent on tasks.

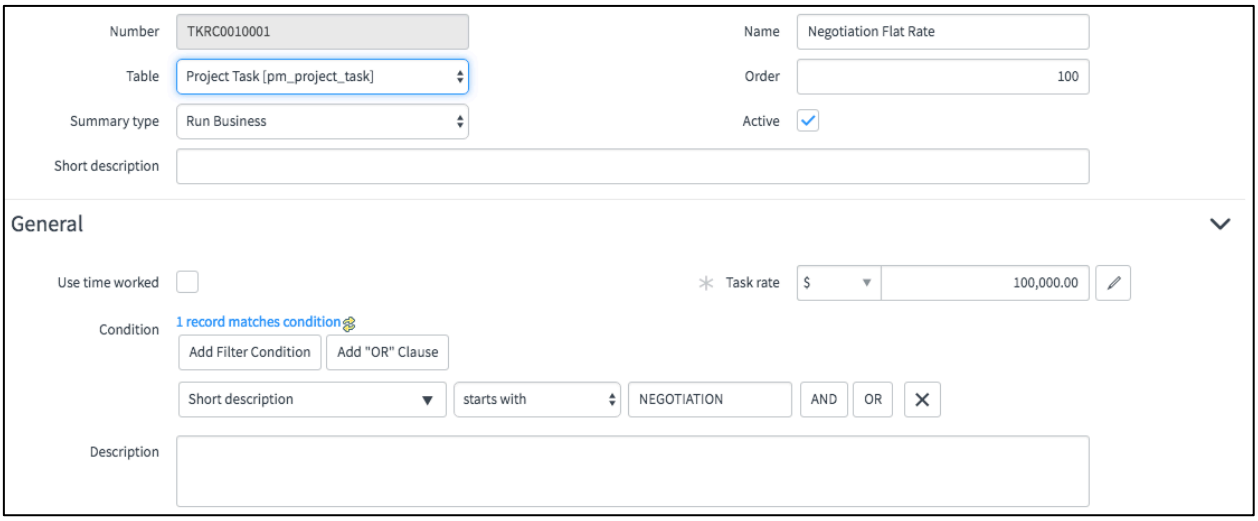


6. Click **New** to create a new record.

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7. Enter the following information:

   Name: **Negotiation Flat Rate**
   Table: **Project Task**
   Task Rate: **$100,000**
   Condition: **Project Type starts with Negotiation**



8. Click **Submit**.

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Lab Goal

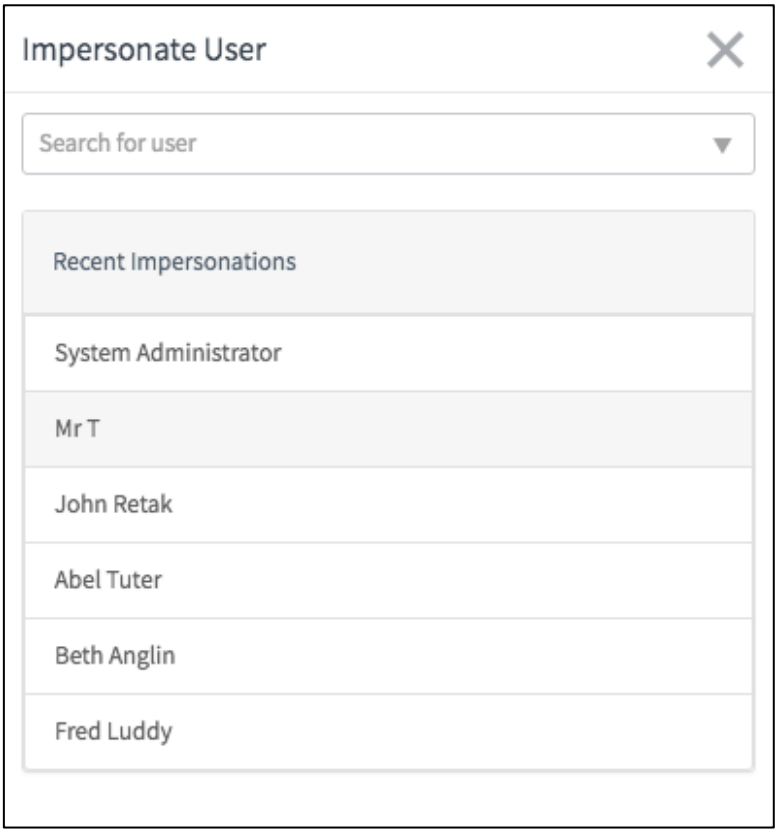
This lab leverages capabilities on the ServiceNow platform such as time cards and rate cards that are used to set up recurring tasks in the next lab.

- Actual effort and cost
- Reviewing Effort and Cost Information

Lab 2.0 Plan and Record Your Teams Work

Actual Effort and Cost

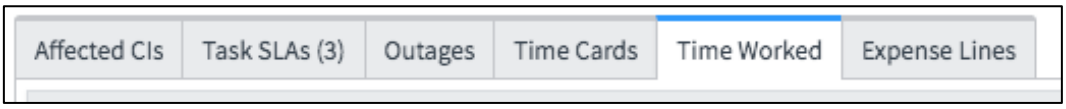
1. Impersonate **Mr. T**.



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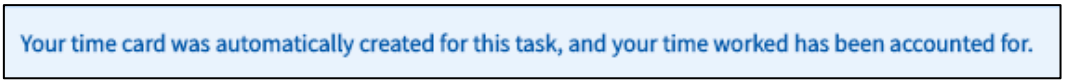
2. Navigate to any open **Incident** available on the ITIL homepage (this homepage should be the default homepage; if you cannot find this homepage, navigate to any open Incident).

3. Scroll to the **Time Worked** related list.

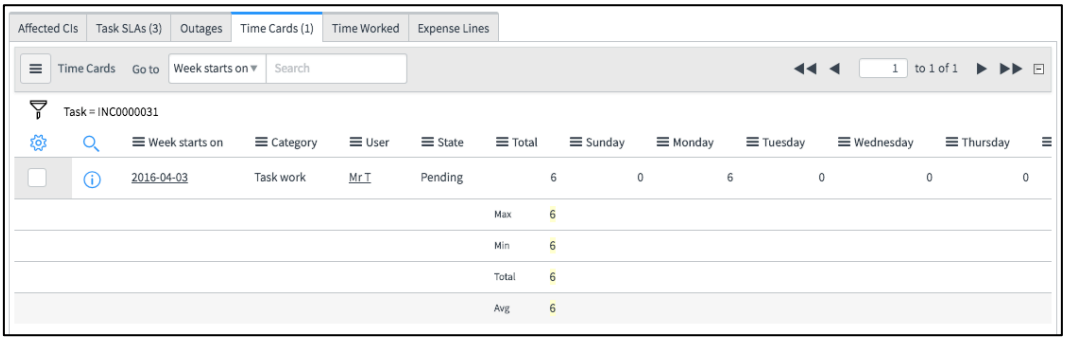


4. Double-click in the Time Worked column where it says ***Insert a new row…*** and enter **6 hours**. Click the **green** tick. An information message should display at the top of the screen noting that a Time Card entry has been created.





5. Click the **Time Card** related list. Refresh this list by clicking on the search criteria. The new Time Card appears.



Note: Updating the Time Worked entry also automatically updates the Time Card.

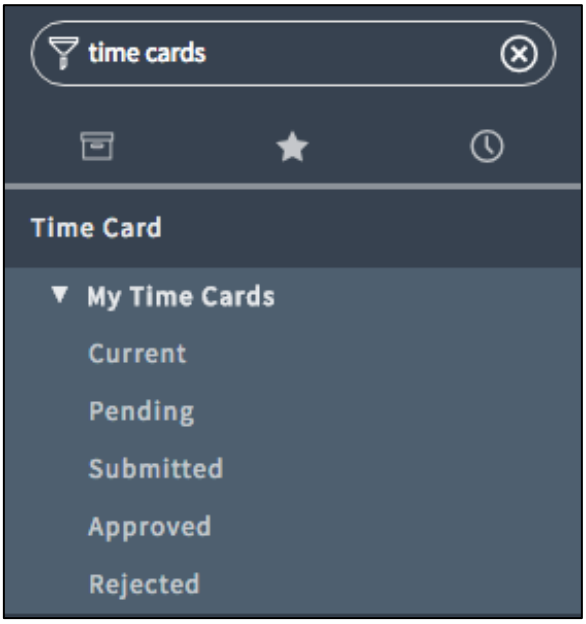
6. Close the Incident by clicking **Resolve Incident** and entering any mandatory fields.

7. Click **Update** to save Incident.

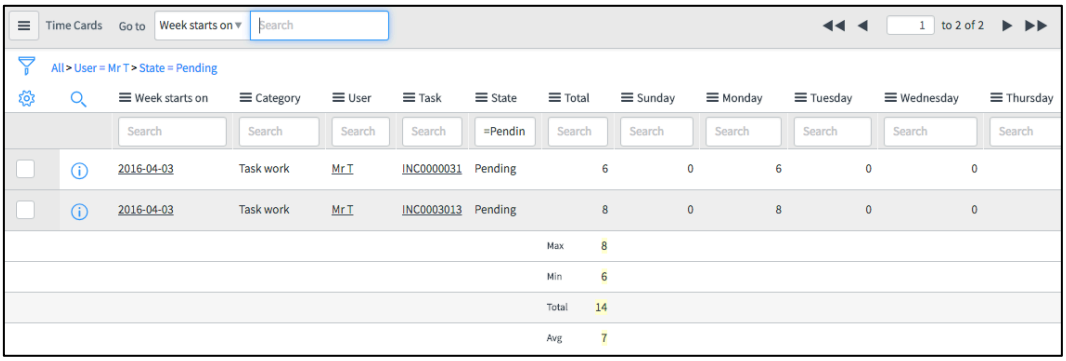
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8. Repeat steps 2-7 for another open incident, but enter **8 hours** instead.

9. Navigate to the **Time Cards** application. Click **Pending**.



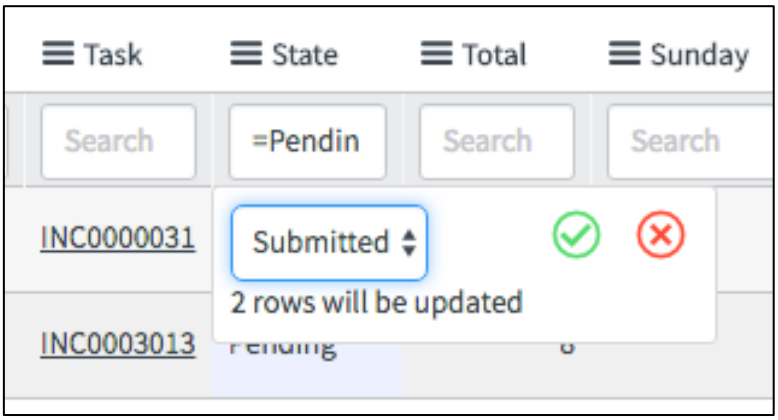
10. These are the Time Cards Mr. T has yet to submit for approval.



Note: The standard approval process is for the user's manager to approve time cards.

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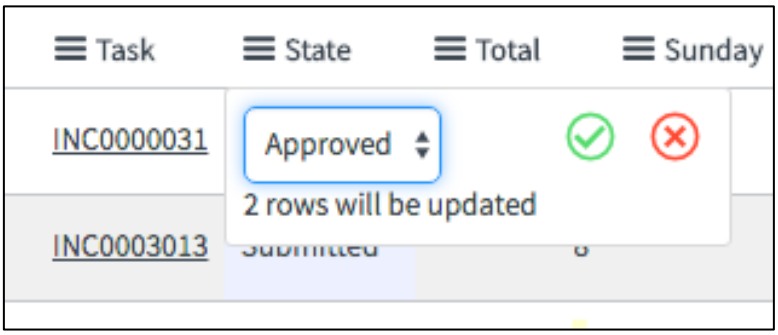
11. Highlight the **State** field for all rows and set value to **Submitted**. Click the **green** tick or press **Return**. The Time Cards are submitted for approval.



12. Impersonate **Lieutenant John Smith**.

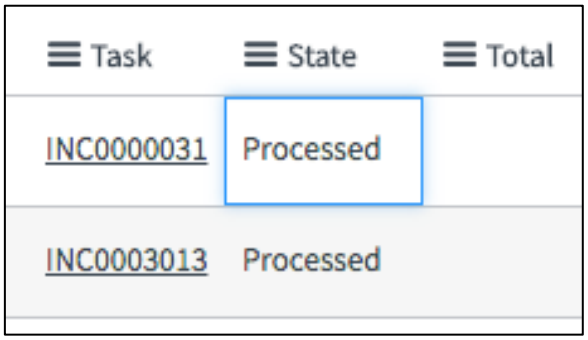
13. Navigate to **Submitted (this week)** under the **Time Card** application.

14. Highlight the **State** field for all rows and set value to **Approved**.



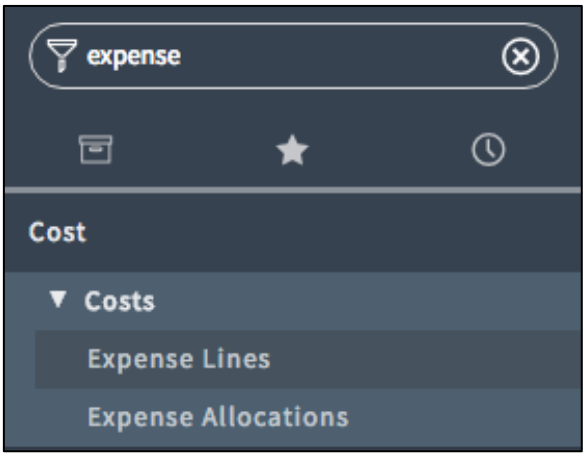
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Note: The **State** of the Time Cards changes to **Processed** immediately. This means it has created an expense line for the time cards using the rate cards configured in the previous lab.

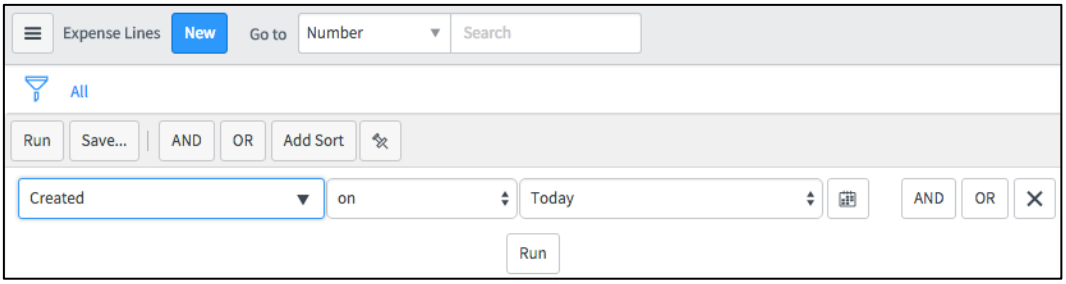


Reviewing Effort and Cost Information

1. Impersonate **System Administrator**.
2. Navigate to **Expense Lines** under **Cost** application.



3. Filter the list to show only Expense Lines created today.



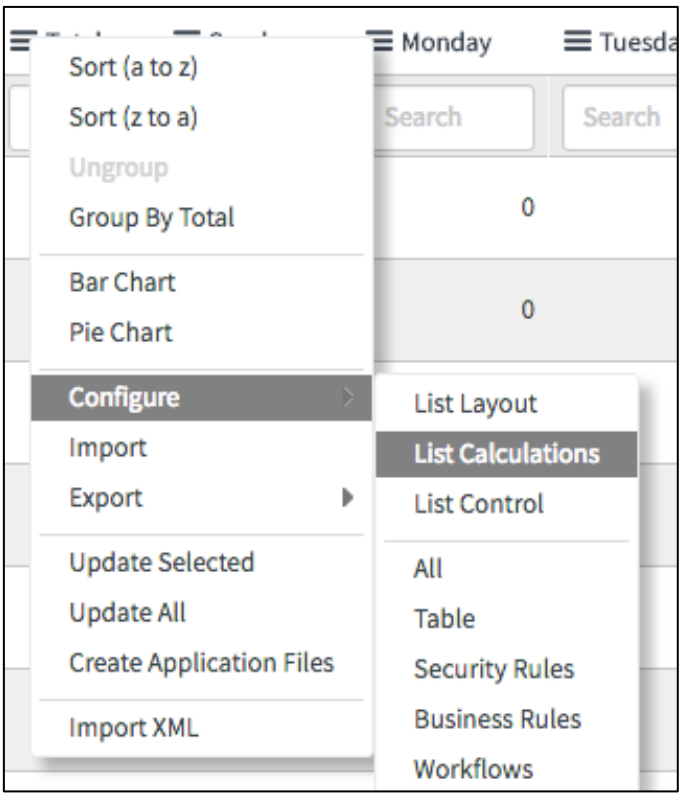
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4. Here note the cost per Incident.

   What do you notice about the cost?

   What rate has it used?

5. To add more valuable information to this table, click the Menu button next to the **Amount** column heading and select **Configure > Configure List Calculations**.



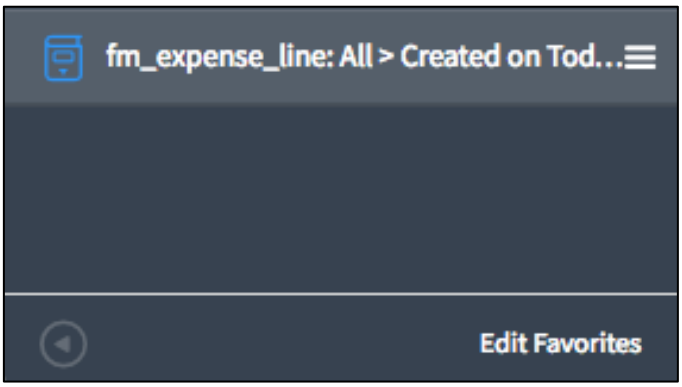
6. Select **Total Value**, **Maximum Value**, and **Average Value**. Obviously, this displays limited data, but using the list view functionality, you can discover the total cost and average cost of resolving tasks.

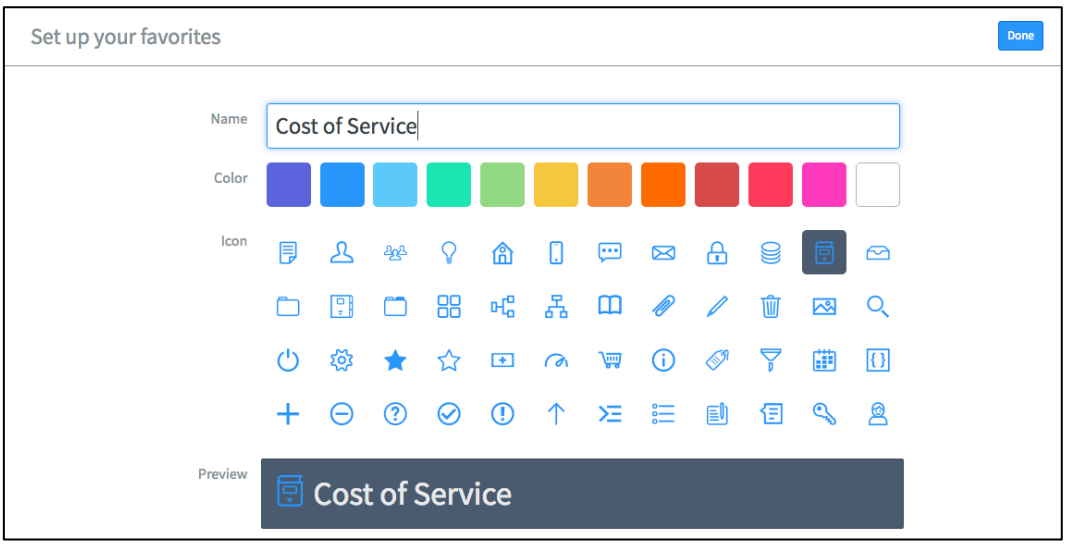
7. Click the **Favorites** star icon in the navigation list and drag the search criteria into the **Favorites** list.



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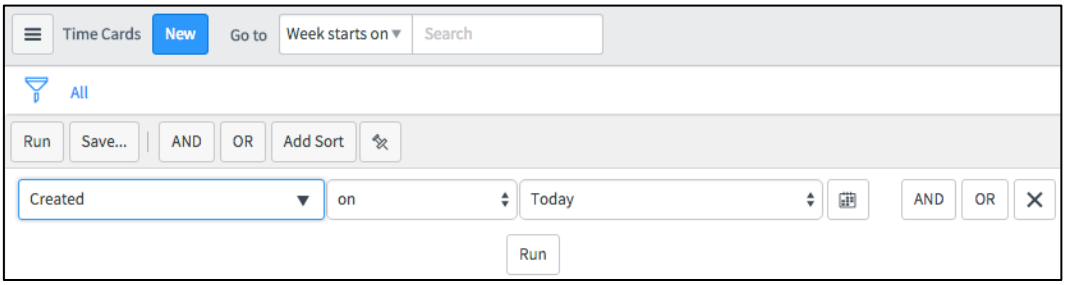
8. Click **Edit Favorites** and change the name to **Cost of Service** and choose a different color. Then click **Done**.





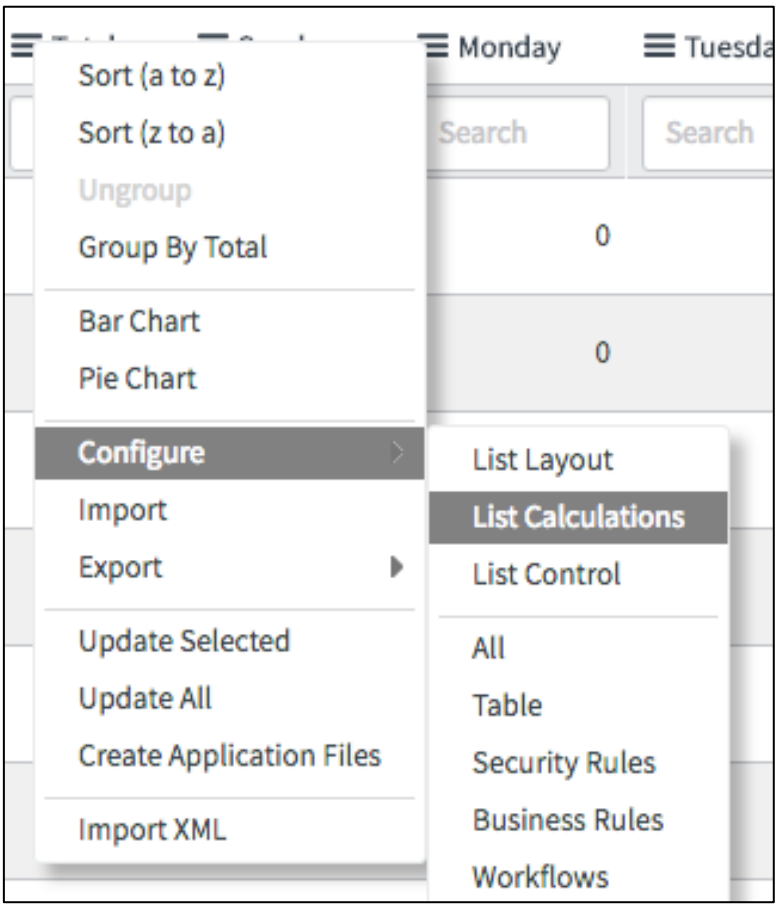
9. Now for effort. Navigate to **All** under the **Time Cards** application**.**

10. Filter the list to show only Time Cards created **today**.



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11. Similar to what we did with the Expense Lines, right-click the **Menu** button next to the **Total** column heading and select **Configure > Configure List Calculations**.



12. Select **Total Value**, **Minimum Value**, **Maximum Value**, and **Average Value**.

13. This shows you some statistics to help with creating recurring tasks and average resolution times. This can also help with forecast time required to reduce current backlog over the next few weeks.

14. Click the **Favorites** icon in the navigation list and drag the search criteria into the **Favorites** list.



15. Click **Edit Favorites** and change the name to **Actual Effort**. Click **Done**.

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16. Assume that The A Team has on average 30 Incidents per month. We now have some averages regarding the time required to ensure the team is resolving Incidents.
    - 40 hours per group member per week multiplied by 4 weeks (month) = 640 hours
    - 30 Incidents multiplied by the average of 16 hours = 480 hours.
    - This gives us 160 / 640 = 0.25 free time to work on non-BAU tasks.

The information captured in Time Card records and Expense Line records can really help with managing time spent on all tasks used in ServiceNow and the costs.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.
2. Click **I am done!**

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Lab Goal

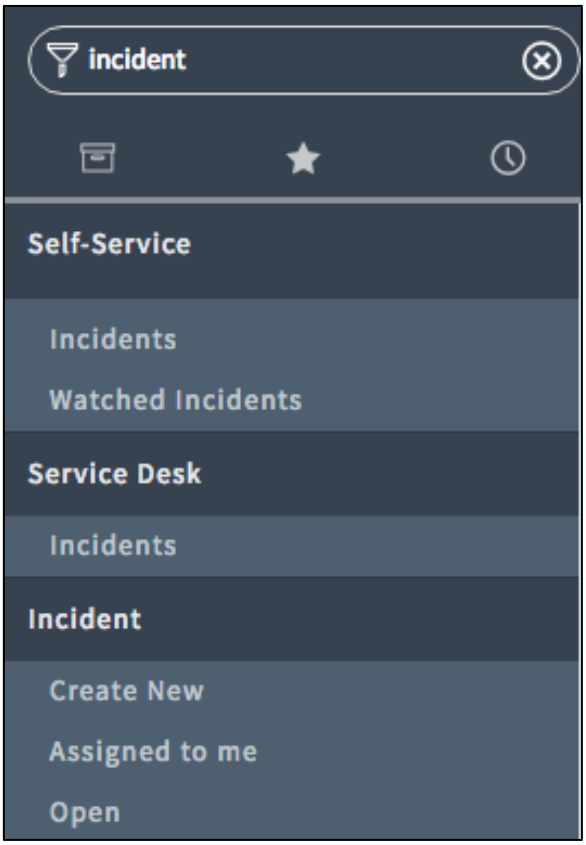
Lab 3.0 Set Up Recurring Tasks

After using platform functionality to identify how the time needed to spend on operations works, we can set up recurring tasks for these. This lab explains how to set up recurring tasks.

- Allocate Time for Operational Tasks
- Management of time off
- What is my team working on?

Allocate Time for Operational Tasks

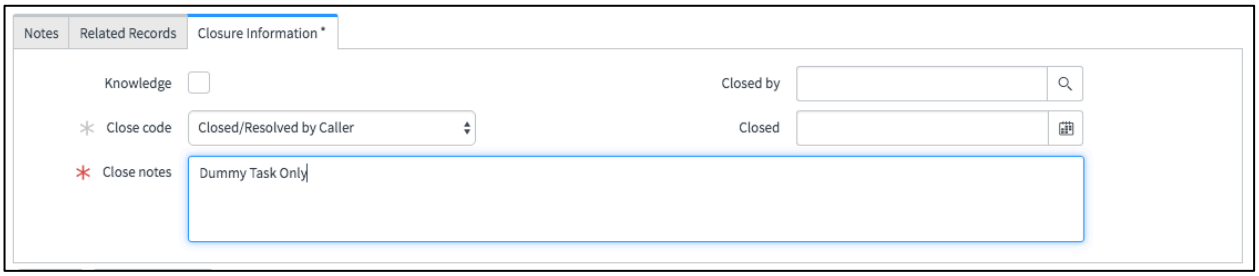
1. Navigate to **Create New** under the **Incident** application**.**



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2. Create a dummy Incident for Reporting purposes that any User or Group can reuse for general Service Desk Operational use. Enter **INCRECURRING** for the number and fill out the short description as **RECURRING TASK FOR THE A TEAM**.

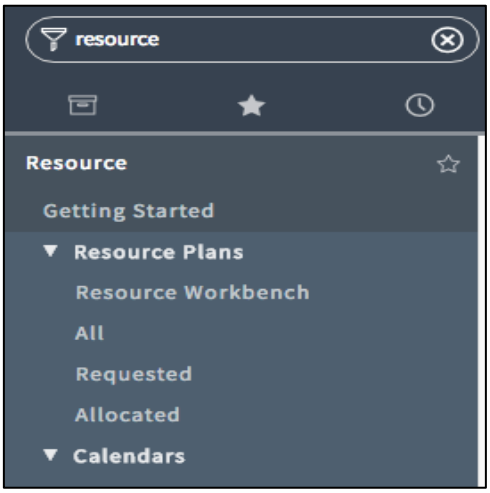
   Note: For now, this is the best way to block operational time for allocation and reporting purposes. This record appears in reports; therefore, make sure **Number** and **Description** are clear and the Incident is **Closed** (since fields on the Close Notes tab are set as mandatory, be sure to select values here).



3. Click **Submit**.

4. Impersonate **Lieutenant John Smith**, the manager of the team.

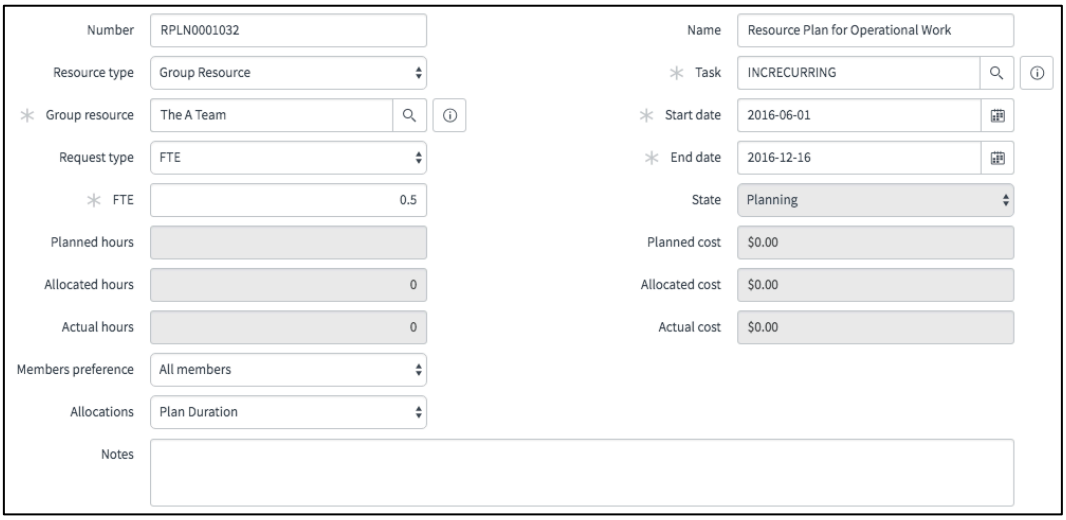
5. Navigate to the **All** under Resource Plans.



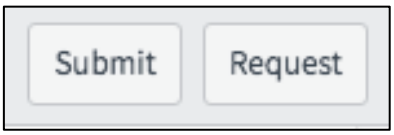
6. Click **New**.

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7. Complete the record as shown in the example, requesting 50% effort from The A Team group from 2016-06-01 to 2016-12-16 for a Regular BAU work.



8. Click **Request** to make the request.

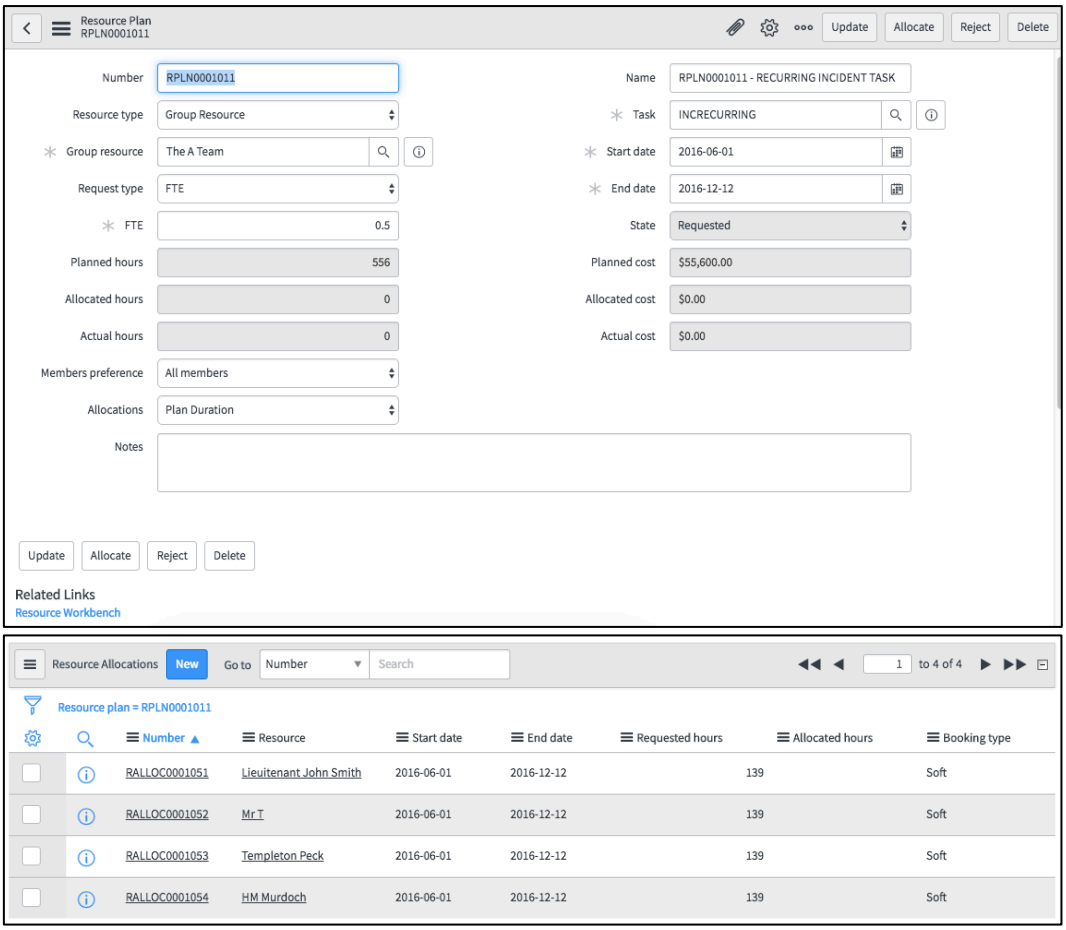


9. After submission, notice the following updates:

   - Planned hours is **556** (this is based on the number of available hours between the start and end dates)
   - Planned cost is **$55,600.00** (this is the number of planned hours multiplied by the Group's hourly rate)
   - Allocated cost is **$0** (this is updated when the Resource Plan is allocated using either the default group hourly rate or Labor Rate Card of a user)
   - Actual cost is **$0** (this is updated with every time card approved for the related task)

10. In the Resource Allocations related list, two records should appear. A record for each member in the group. Notice that the hours have been split between the four members (i.e. 139 hours per user), and the Booking type is **Soft**. Soft means that the users have been requested, but have not been allocated to the task.

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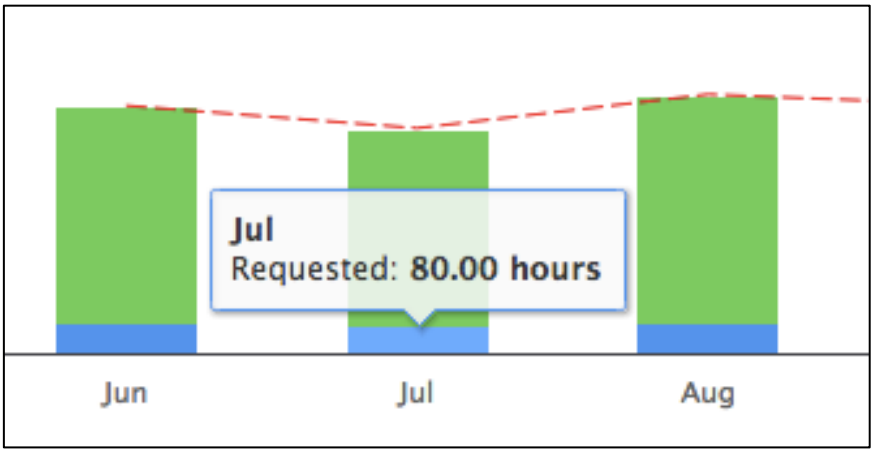
11. After Resource Plan submission, the Resource Allocations have a Booking Type of **Soft**. Change these to **Hard** bookings. Click the **Resource Workbench** related link.



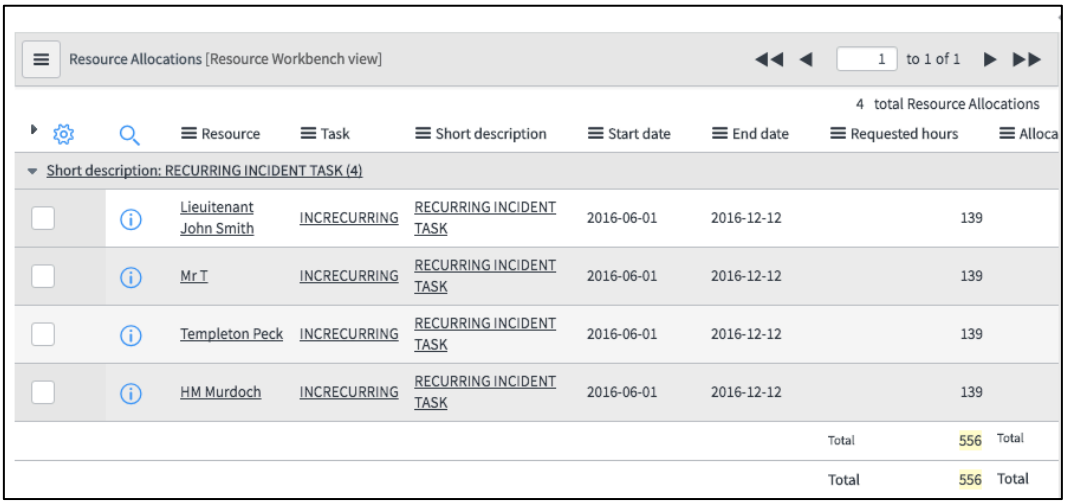
12. As leader of The A Team, **approve** the Resource Plan and **allocate** the time to Mr. T and Lieutenant John Smith.

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13. Hover over the **blue** bars to see the Requested Hours.

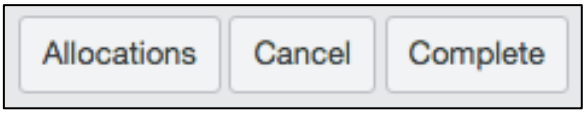


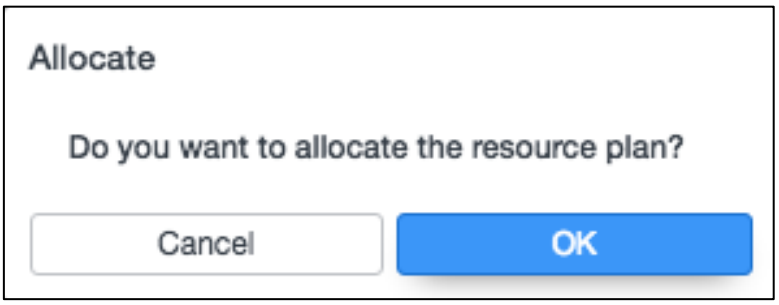
14. Click on the bar to see the requests made and associated tasks.



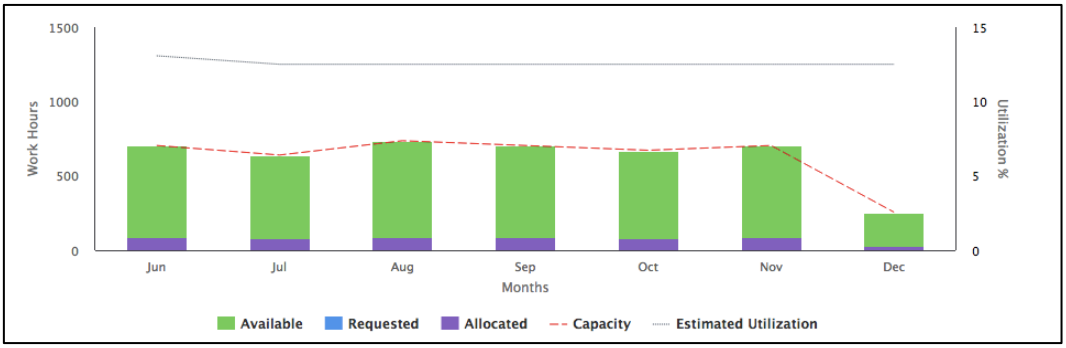
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15. Close dialog. Click **Allocate** at the top right of window and confirm allocation by clicking **OK**.





16. The Resource Workbench should auto-update with the Requested Hours (purple).

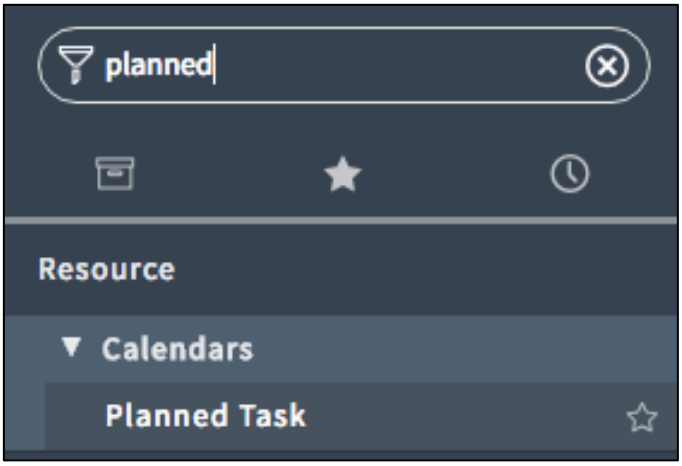


The 556 hours are spread over the 7 months through to December. Hover over the **purple** bars for each month to see the total, 556 hours.

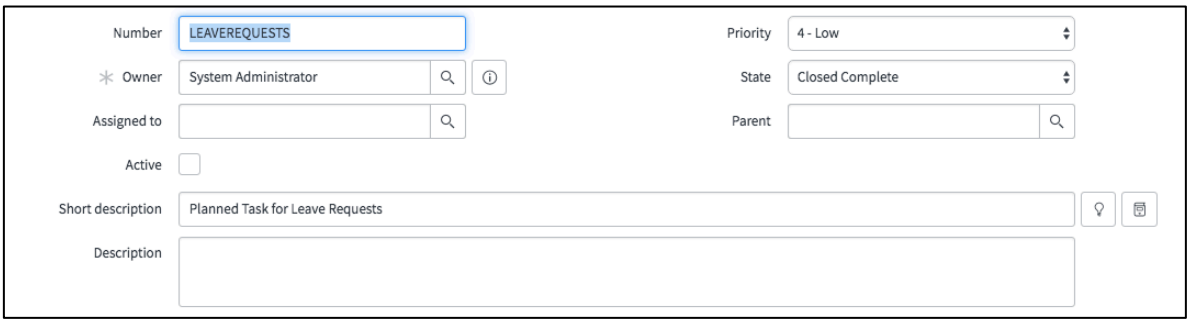
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Managing Time Off

1. Use the method for creating a record for Operational Tasks to create a record for **Leave**. Navigate to **Planned Task** under **Calendars** in the **Resource** application.



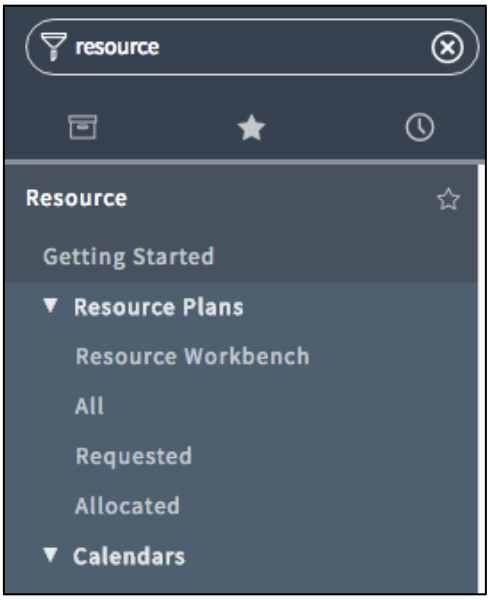
2. Create a dummy record for Reporting purposes that any User or Group can reuse for Leave Requests. Enter **LEAVEREQUESTS** for the number and fill out the short description as **Planned Task for Leave Requests**.



Note: This is similar to what we did for the Operational Incident tasks, but now for Leave.

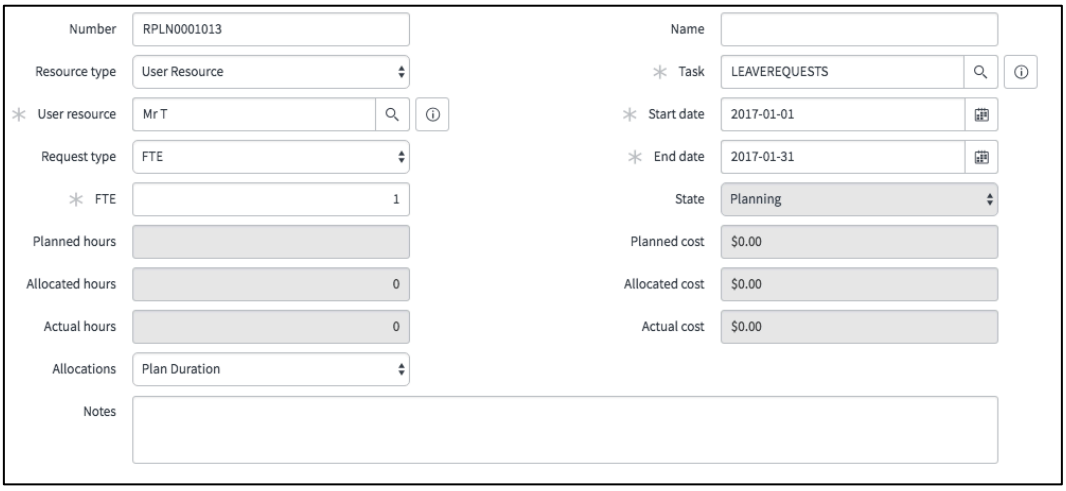
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3. Navigate to the **All** under **Resource Plans** in the **Resource** application.



4. Click **New**.

5. Mr. T worked hard the past year and plans to take leave for the month of January 2017. Complete the Resource Plan as follows.

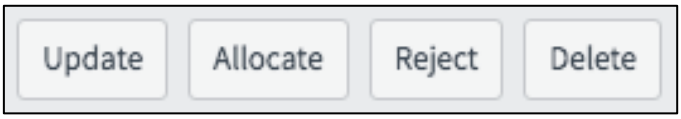


Note: The FTE is now 1, which is the full day.

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6. Click **Request** to make the request. The Resource Allocation record is also created for the time requested.

7. As manager, click **Allocate** to approve the leave.



Why use the Resource Plan?
The Resource Plan provides one single place to report from to find out where resources have been requested and allocated as well as their leave.

How are leave requests submitted?
This is up to you. The example shows how to use Resource Management to provide an overall view of resource availability. How these records are created, could be automated from a Human Capital Management solution or automatically created after a Catalog Item is approved. Consult your ServiceNow System Administrator, ServiceNow or ServiceNow Partner to help with this.

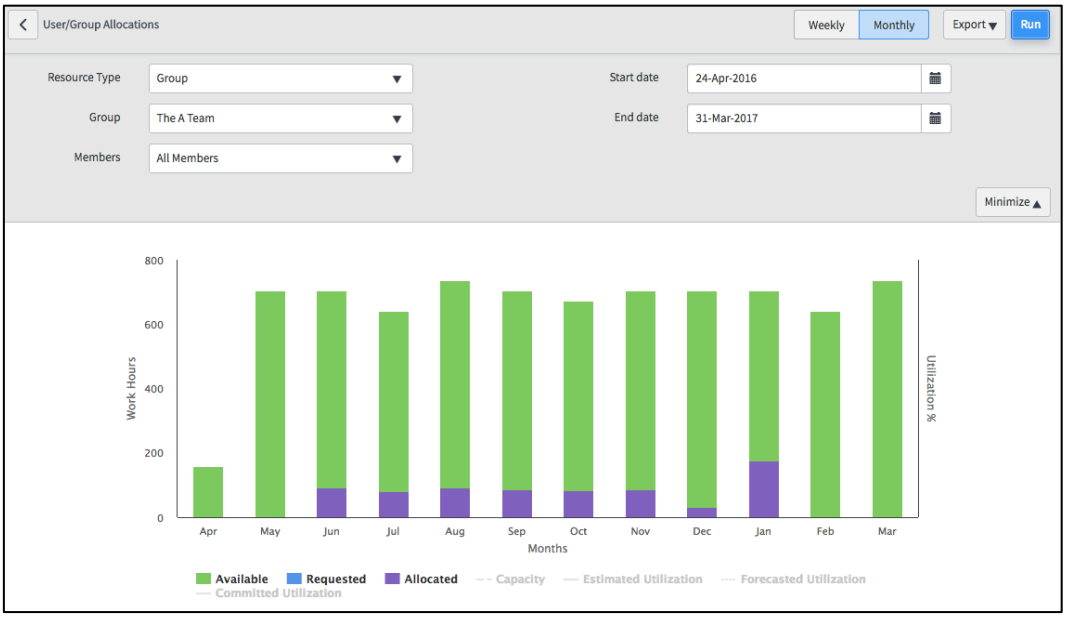
What Is My Team Working On?

1. Now John can view his team's availability.

2. Navigate to **User/Group Allocations**. This is how to view the allocations using the Resource Workbench.

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Select Resource Type: **Group** and Group: **The A Team**.



Default view is by week, but you can toggle to see by month and change the start and end dates. Change the End Date to be **March 2017**. Then click **Run**.

You can change the Resource Type from Group to User and view the availability of other teams and members.

Try changing to show Mr. T only; is he available for the month of January?

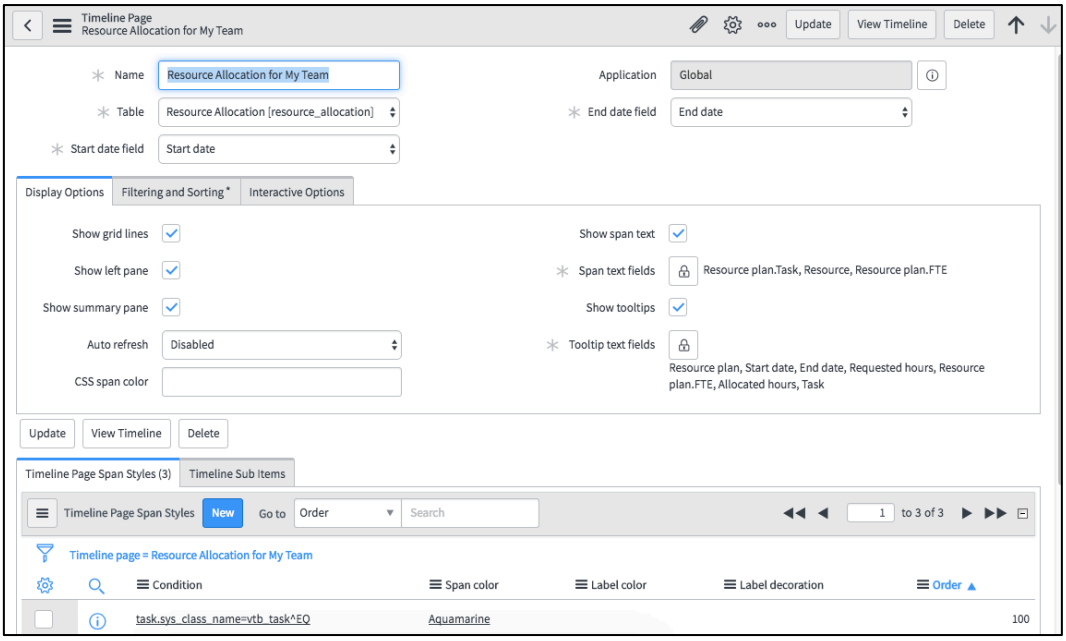
You can also hover over the Available, Requested and Allocated bars to view hours assigned. Can you drill down into them?

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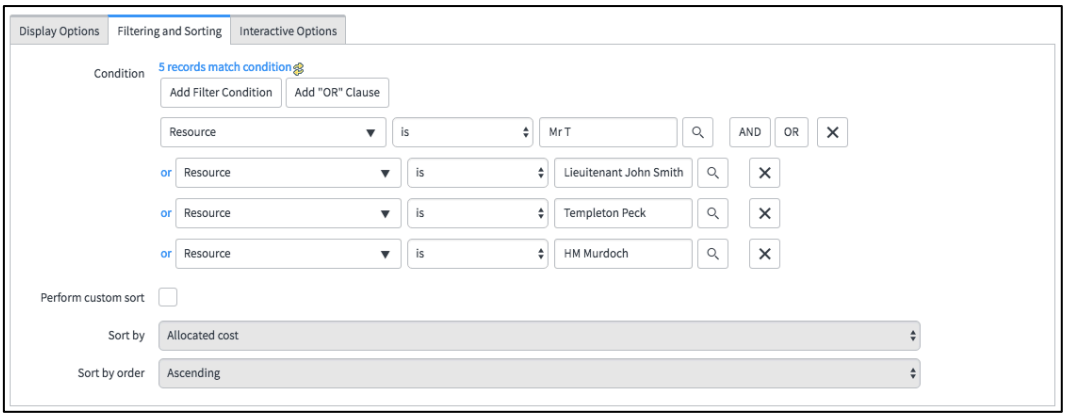
3. A way to view allocations is by building a Timeline Page. Navigate to **Timeline Pages**.



4. Create a new Timeline Page with the following information:

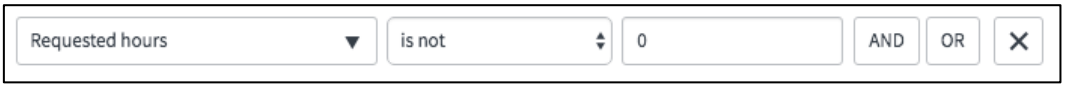


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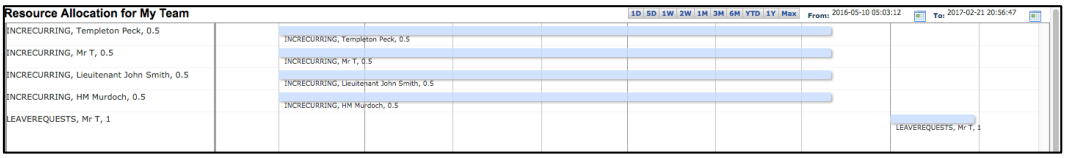


5. Right-click the header row of the record and click **Save**.

   Extra: Why would the following criteria be important?



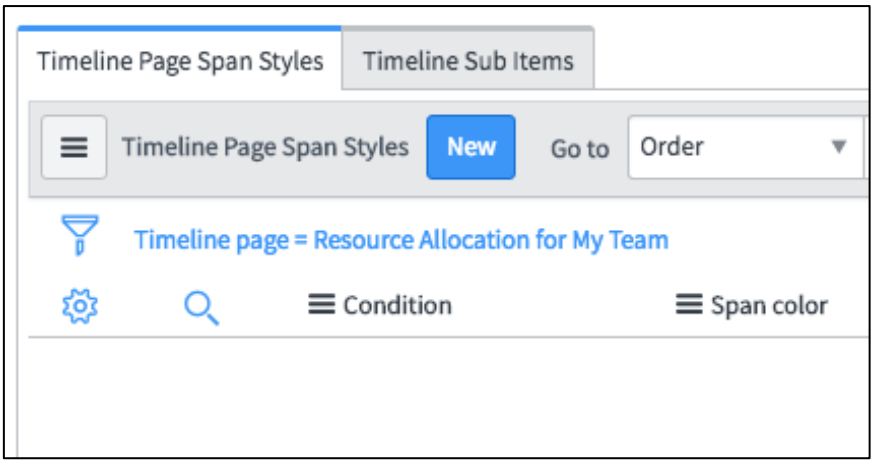
6. Click **View Timeline**. A new window opens with **leave requests** and **operational tasks** displayed for The A Team.



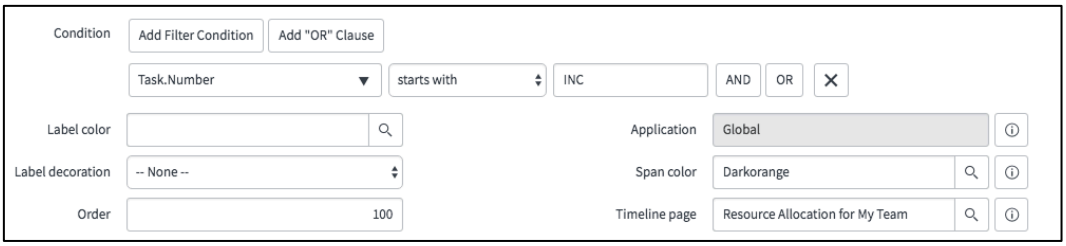
   These views can be configured to show tasks as different colors so that it is easy to identify team tasks.

7. Navigate back to the Timeline Page record and go to the Timeline Page Span Styles related list.

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8. Click **New**.
9. Create a record with the following details.



10. Right-click the header row of the record and click **Save**.
11. Create another for the Leave Requests. What qualification would you use?
12. Navigate back to your Timeline Page record and click the View Timeline button. What do you notice? Is it easier to identify the types of records now?

    This view is a useful view to see what your team is working on; project versus operational tasks and time off.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.
2. Click **I am done**.

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Lab Goal

Lab 4.0 Project Work and Resource Planning

In Lab 1.0 we added IT, Armed Forces and Negotiation as skills for The A Team. In Lab 3.0, we created Resource Plans for the team to spend part of their day on Incident tasks. The A Team now wants to work on some other initiatives and take advantage of these other skills.

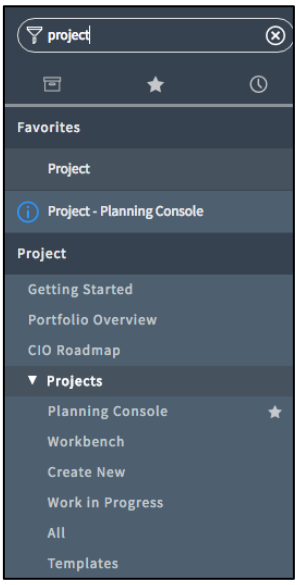
Mr. T is currently recording his work in Excel spreadsheets, but is directed by his boss Lieutenant John Smith to use ServiceNow to track his project and to help him with his resource planning.

This lab explains the following activities:

- Set up a Project
- Request Resources for your Project
- Review Resource Plans and Allocate Resources

Set Up a Project

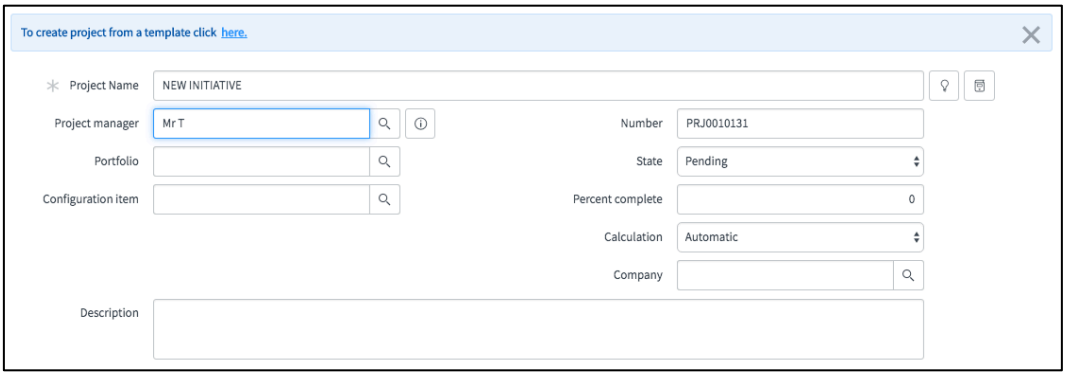
1. Impersonate **Mr. T**.
2. Navigate to **All**, under the **Project Management** application.



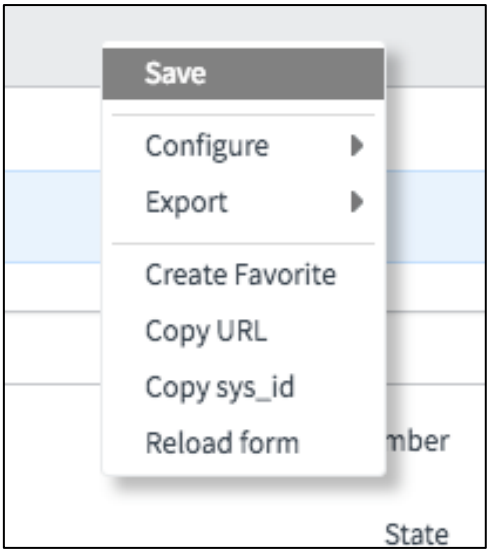
3. Click **New** to create a new Project.

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4. Complete the details as shown in the example.



5. Right-click on the header of the record and click **Save**.

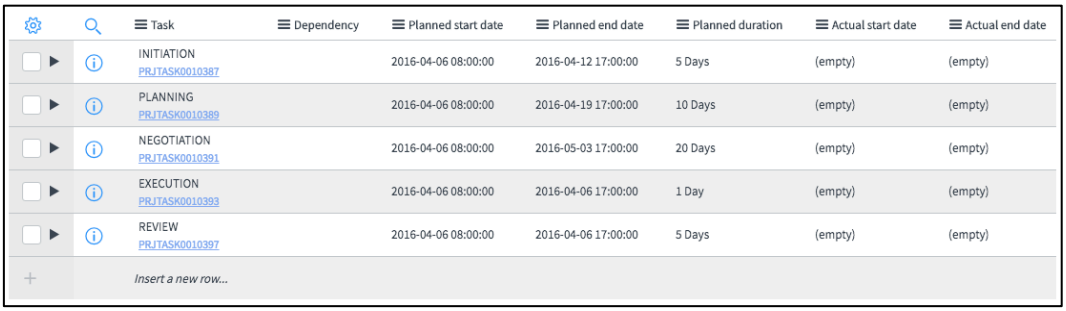


6. Use the newly created project record to add tasks required for the project. Navigate to the **Project Tasks** related list and create the following tasks by double-clicking in the **Short Description** field and typing the task **name** and **duration**.

   - **INITIATION / 5 Days**
   - **PLANNING / 10 Days**
   - **NEGOTIATION / 20 Days** (what rate card would be applied to this task?)
   - **EXECUTION / 1 Day**
   - **REVIEW / 5 Days**

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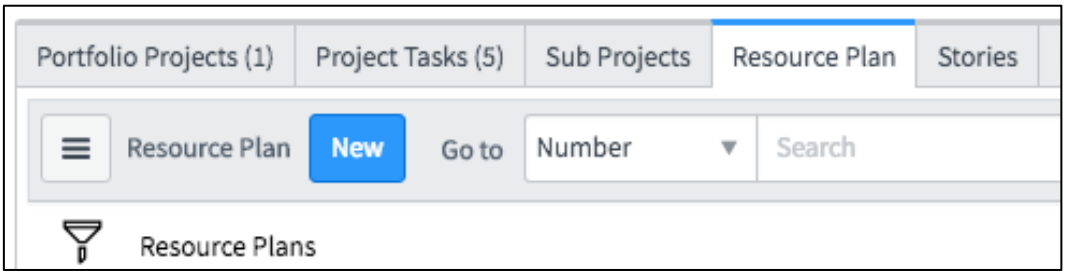
7. The Project Task related list should look like the example.



Task	Dependency	Planned start date	Planned end date	Planned duration	Actual start date	Actual end date
INITIATION PRJTASK0010387		2016-04-06 08:00:00	2016-04-12 17:00:00	5 Days	(empty)	(empty)
PLANNING PRJTASK0010389		2016-04-06 08:00:00	2016-04-19 17:00:00	10 Days	(empty)	(empty)
NEGOTIATION PRJTASK0010391		2016-04-06 08:00:00	2016-05-03 17:00:00	20 Days	(empty)	(empty)
EXECUTION PRJTASK0010393		2016-04-06 08:00:00	2016-04-06 17:00:00	1 Day	(empty)	(empty)
REVIEW PRJTASK0010397		2016-04-06 08:00:00	2016-04-06 17:00:00	5 Days	(empty)	(empty)
Insert a new row...						

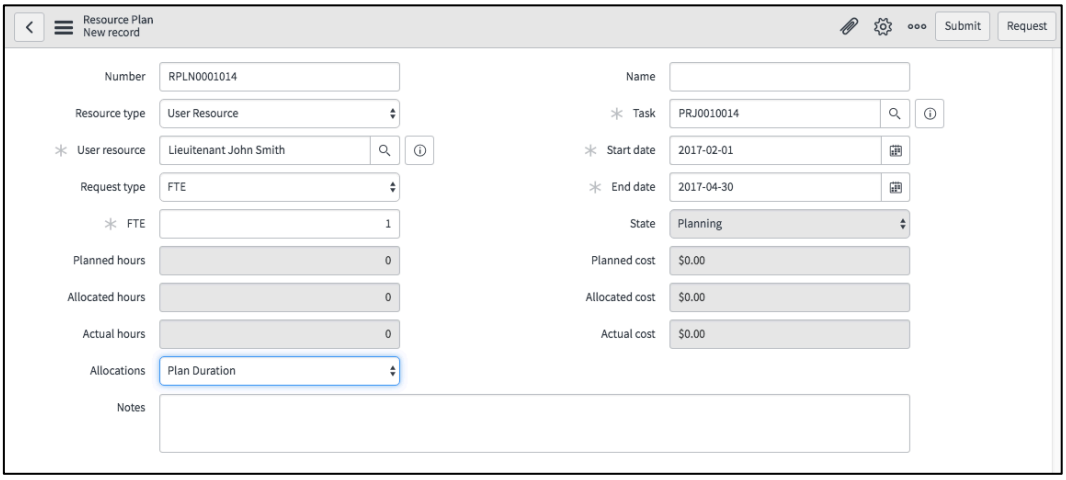
8. After creating a project with a number of tasks, you can request resources for the project. Of course, Mr. T is one resource, but he also needs his boss as well as help from another team.

9. Navigate to the **Resource Plan** tab.



10. Click **New**.

11. Complete the Resource Plan as shown in the example.



12. Click **Request**.

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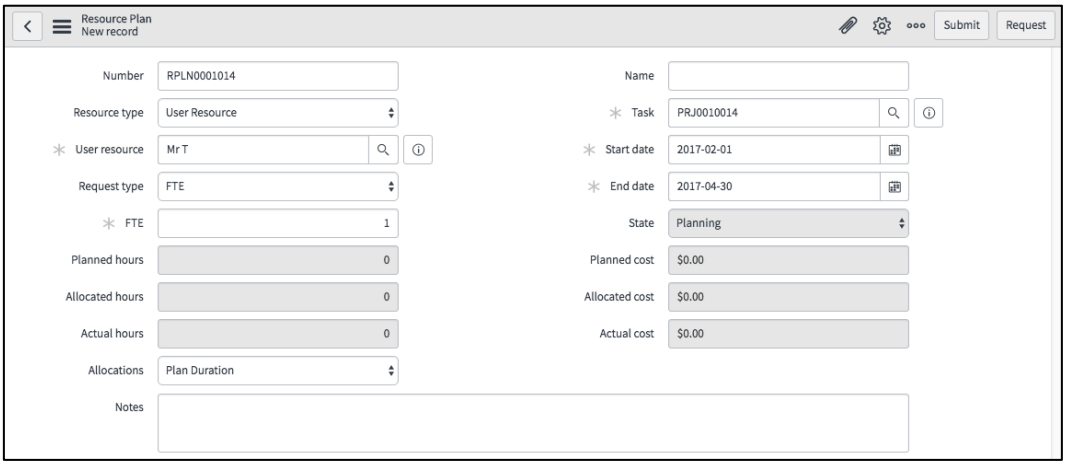
13. Take note of the **Planned cost** value.

14. Return to **Project record**.



15. Create another Resource Plan for Mr. T.

16. Complete the Resource Plan with the same details as above, but for yourself, Mr. T.



17. Click **Request**.

18. Notice that the Planned costs are different. This is because the Resource Plan for Lieutenant John Smith used the default group hourly rate and the Resource Plan for Mr. T used the Labor Rate Card for Mr. T.

19. Navigate back to the Project by clicking on the **information** icon next to the Project field.

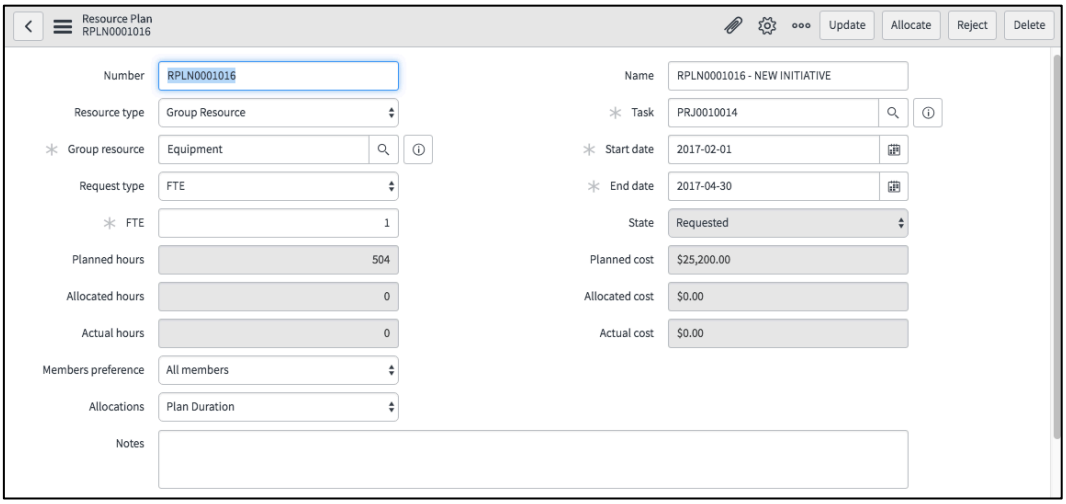


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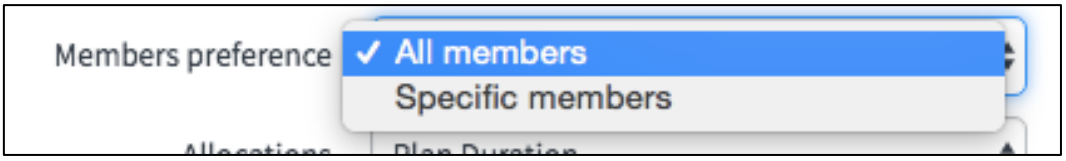
20. Open the **Resource Cost** tab. The Planned Cost field is the total of the Planned Cost of both Resource Plan requests.



21. Create another **Resource Plan** for the **Equipment** group.



22. **Note**: You can select only particular members from a group by changing the Members preference field and then selecting the members you would like on your project/task.



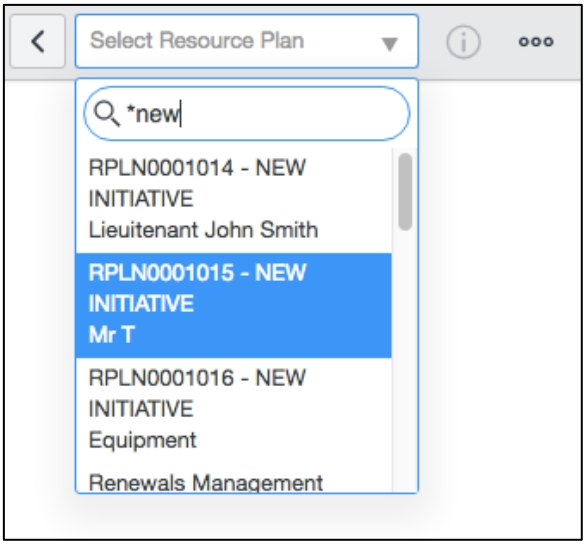


23. Click **Request**.

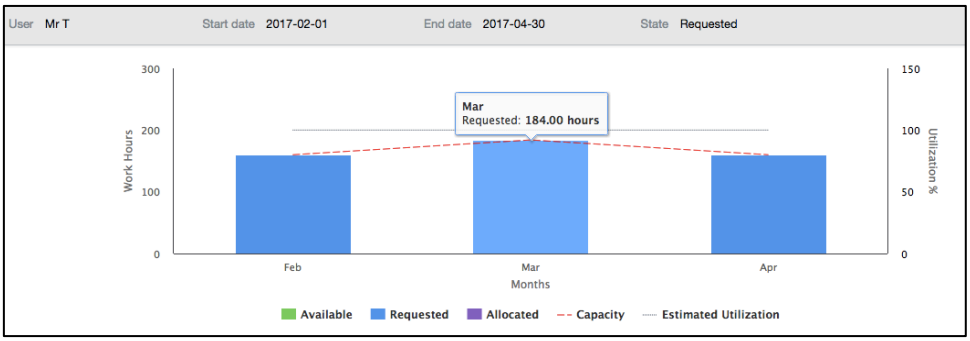
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Set Up a Project

1. Impersonate **Lieutenant John Smith**.
2. Navigate to the **Resource Workbench** under the **Resource** application.
3. Search for "***new initiative**" in the **Select Resource Plan** field.



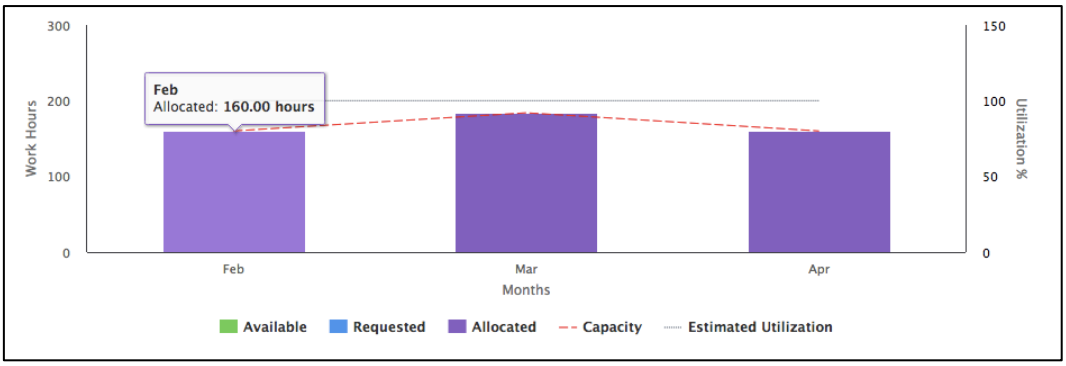
4. Select the **Resource Plan** for Mr. T.



Note: The planned hours have been spread across the 3 months.

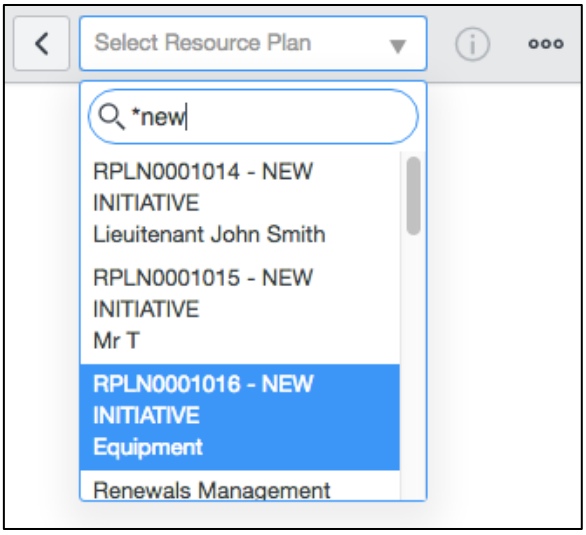
5. Click the **Allocate** button in the top right.

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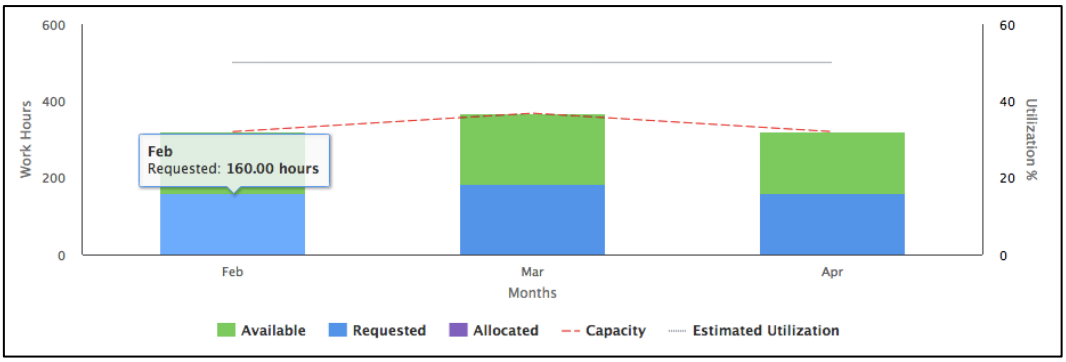
Note: The Allocated Time has been updated.

6. Select the Resource Plan for **Lieutenant John Smith** and allocate his time.
7. Lastly, select the Resource Plan for the **Equipment** team.

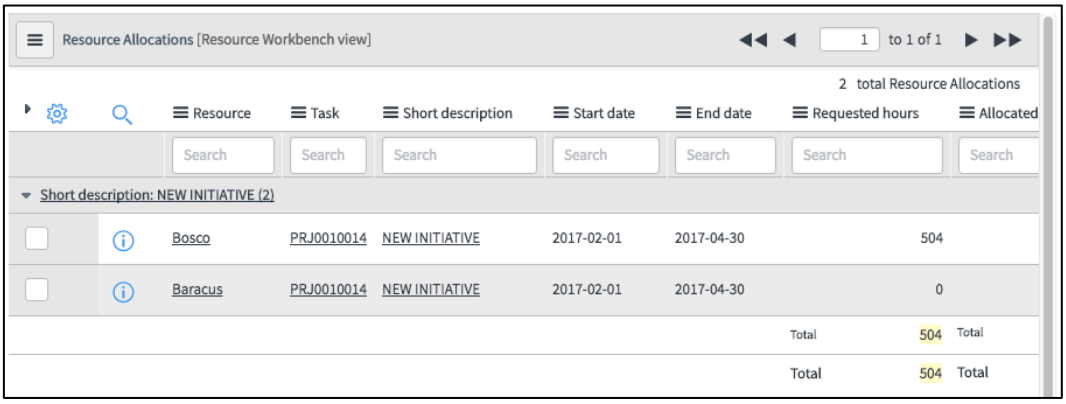


8. Click on the **Requested** bar for February.

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9. Since we only want to assign one of the Equipment team to the project we need to change the requested hours in the table. Set Bosco's Requested hours in the table to 504 and Baracus to 0.



10. Close the dialog window to return to the **Resource Workbench**.

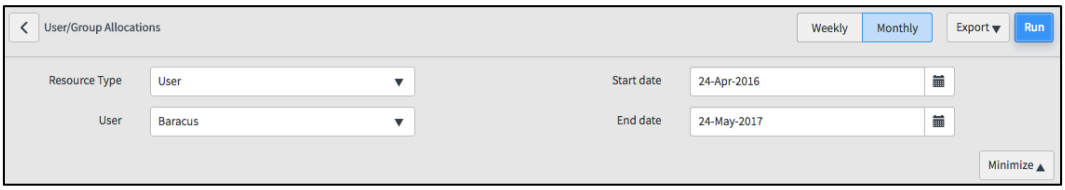
11. Click the **Allocate** button in the top right. By changing the requested hours we have only allocated Bosco to the project.

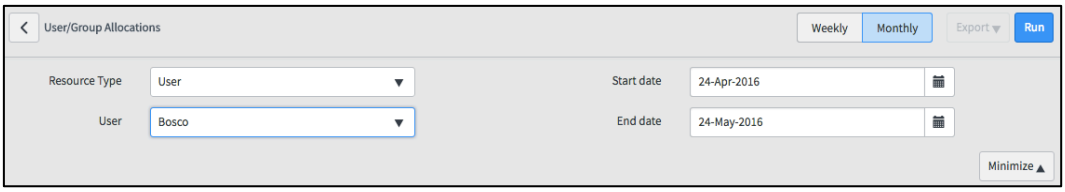
    Where could we view the availability for Mr. T, Lieutenant John Smith and the Equipment Team?

12. Navigate to **User/Group Allocations** under **Resource > Reports**.

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13. Select Resource Type of **User** and toggle between **Bosco** and **Baracus** for the dates up until May 2017. What do you notice?





Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.
2. Click **I am done!**

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Lab Goal

The A Team is not the only team in this organization and we want to train the Enterprise Project Management Officer on how to view resource availability across the organization.

- Overview of Resource Management Application
- Allocating/Rejecting resources
- View your teams new availability

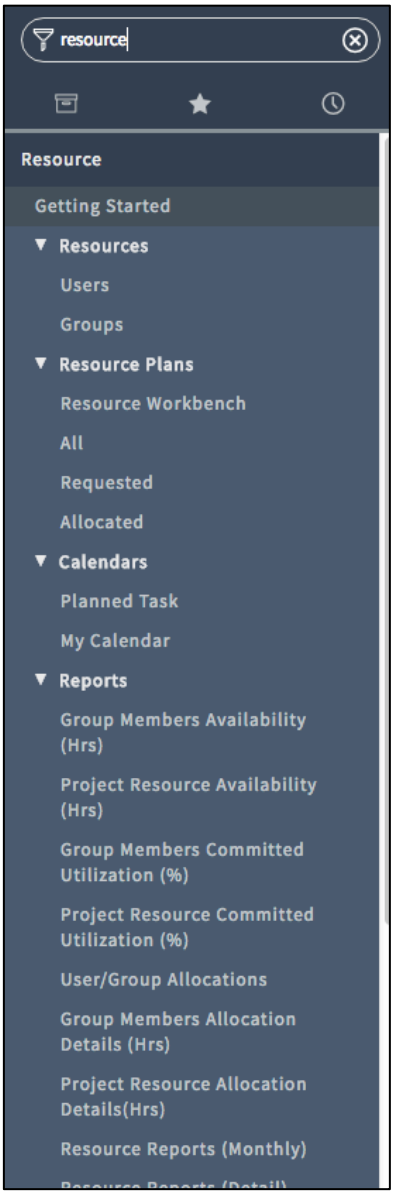
Lab 5.0 Review Resource Plan Requests

Overview of Resource Management Application

1. As the Enterprise PMO, you have visibility across all teams and can also allocate resources where you see fit. Impersonate **System Administrator**.

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2. Type **resource** in the type filter text area to narrow the application list to **Resource**.



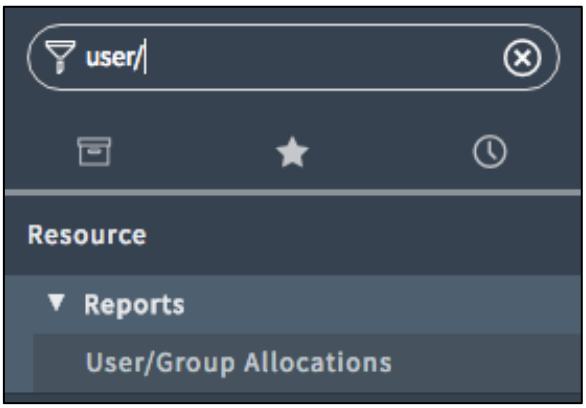
3. The Resource application is where the Enterprise PMO lives to help with Resource Management.

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4. An overview of the Resource modules:

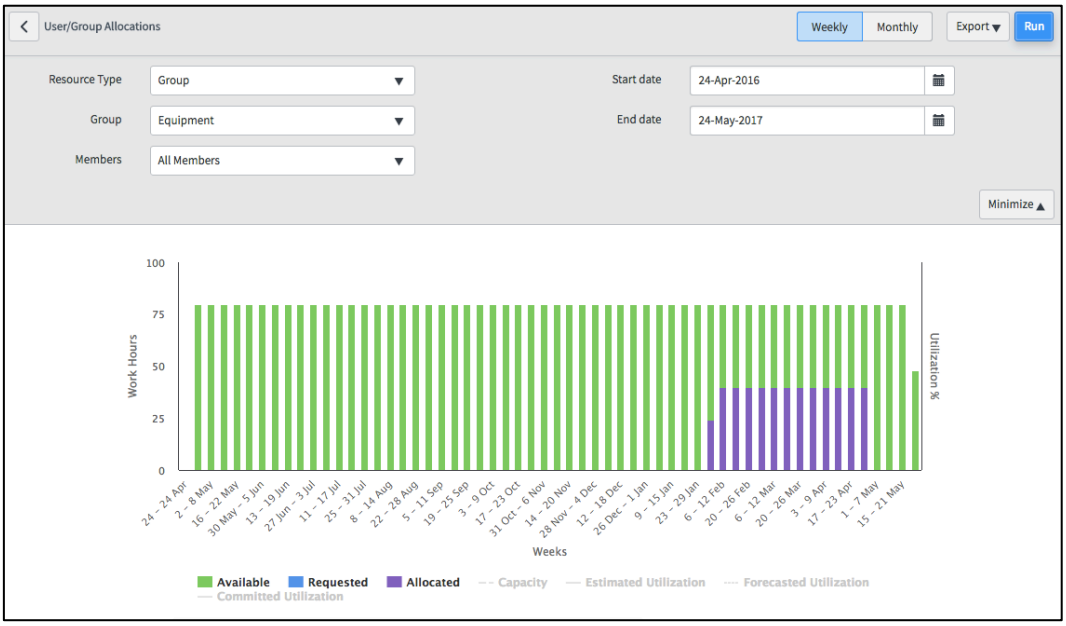
    - **Resources:** Users and Groups (often already populated from the ITSM implementation and helps connect operations with development/project because the users carry out both types of activities).
    - **Resource Plans:** Record used to make requests for resources.
    - **Calendars:** Viewing your own calendar or work; for use by resources across the enterprise.
    - **Reports:** Standard reports that assist with the management of resources.
    - **Administration:** Properties and event colors.

5. To start, navigate to **User/Group Allocations**.

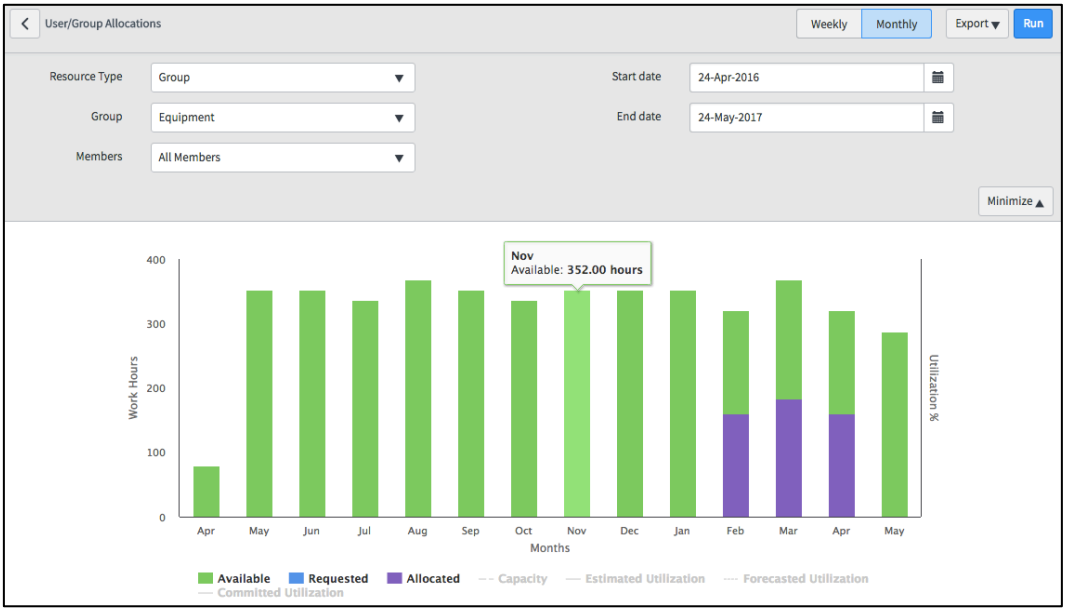


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6. Select the Resource Type of **Group** and set Group as **Equipment**. Click **Run**. Change the End Date to be in **2017**.

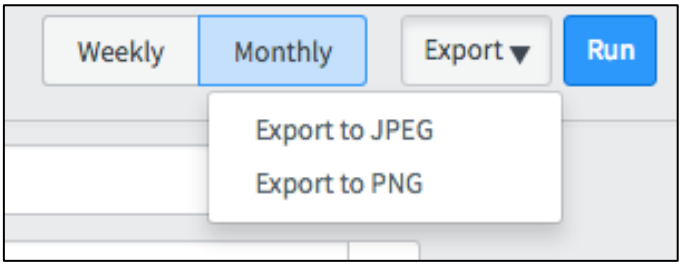


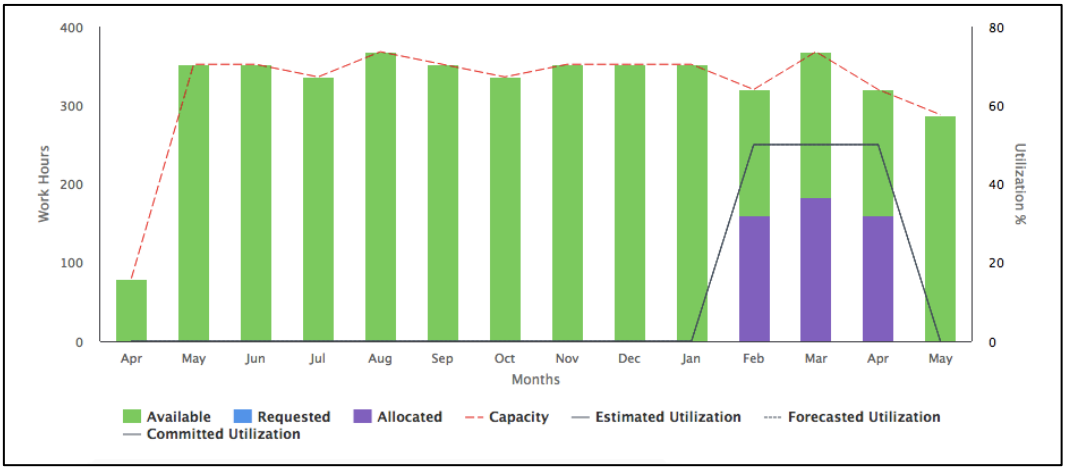
Default view is **Weekly**. Now change to **Monthly**.



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The **Equipment** group is partially allocated for the months of February through to April. You can also toggle on and off the **Capacity**, **Estimated Utilization** and **Forecasted Utilization** and also export if you want to.





Capacity: The total capacity trend for the resources, which is derived from the user or group's schedule. Group capacity is rolled up from the schedules of all the members.

Estimated Utilization: Resource utilization including hard allocations, soft allocations and resource plans in the planning state. The calculation for this trend line is (Total hours from plans in the planning, requested and allocated state / Capacity) * 100. This line is useful for resource requesters to estimate the overall utilization picture because it considers all resource plans. If utilization is greater than 100%, resources might not get allocated to a plan because the demand is more than resource capacity.

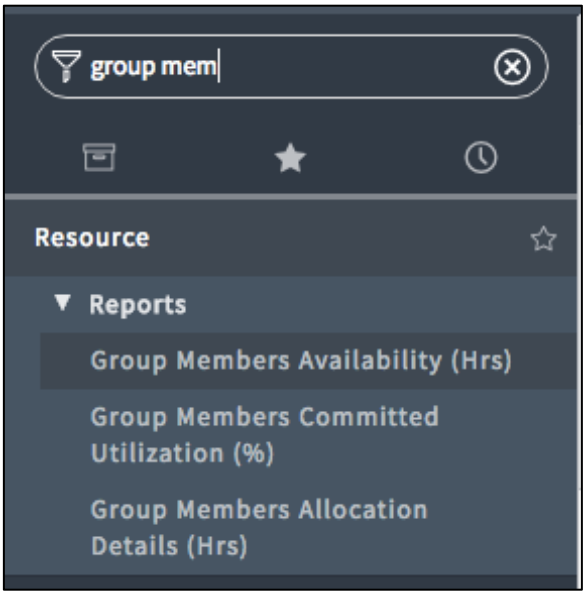
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Forecasted Utilization: Resource utilization including both hard and soft allocations. The calculation for this trend line is (Total hours from plans in the requested and allocated state / Capacity) * 100. This line is useful for resource managers to understand how committed utilization would look if resources are allocated to resource plans in the requested state. If utilization is greater than 100%, resources are over-allocated.

Committed Utilization: Resource utilization including only hard allocations. The calculation for this trend line is ((Total hours from plans in the Allocated state) / Capacity) * 100.

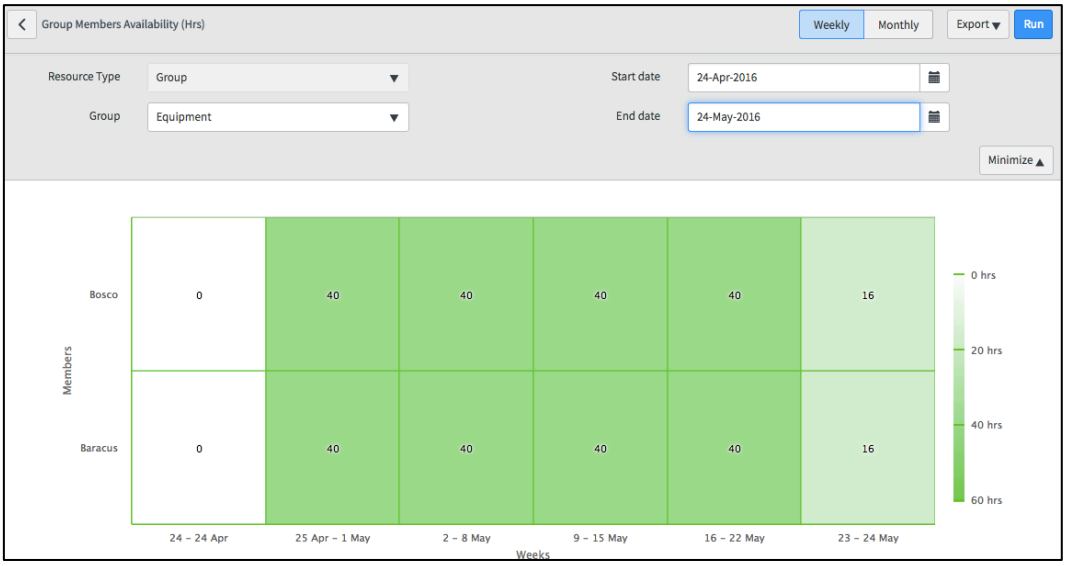
What is missing in this view?

7. Another view you can use is the Group Members Availability view. Navigate to **Group Members Availability**.



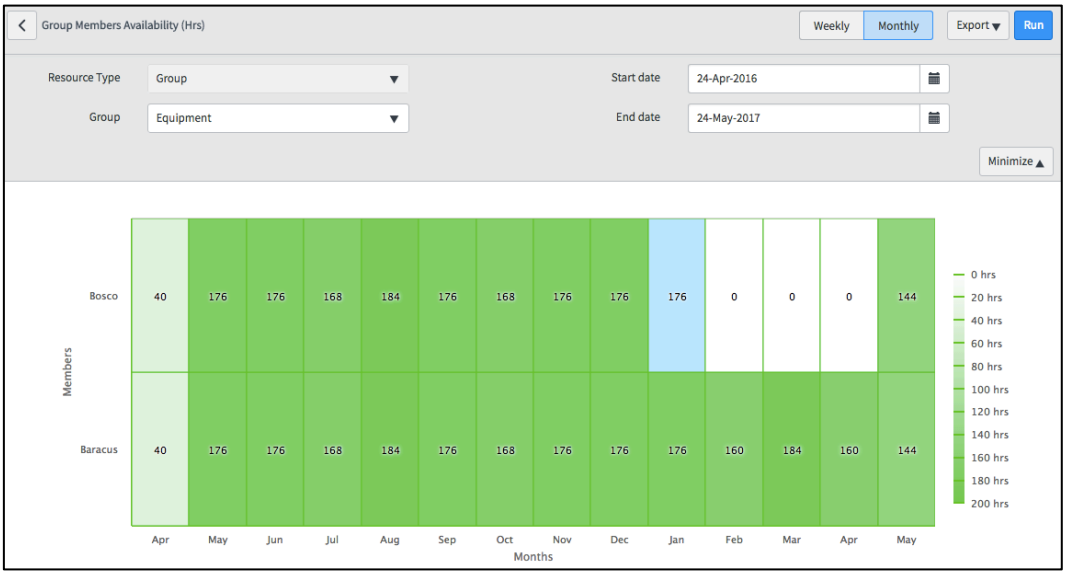
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8. Select the **Equipment** team again and click **Run**.



What is the first thing you notice?

9. Change the **End Date** to be **May 2017** and the view to be **Monthly**.

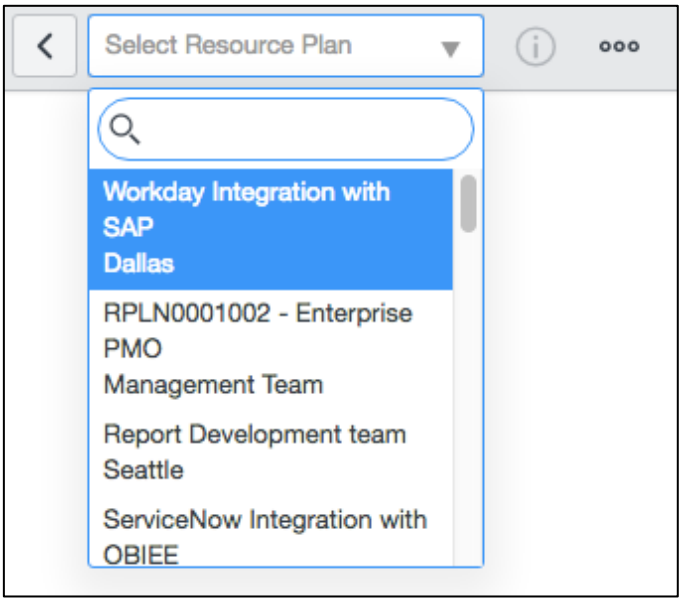


Now we see the available hours for each member of the **Equipment** team.

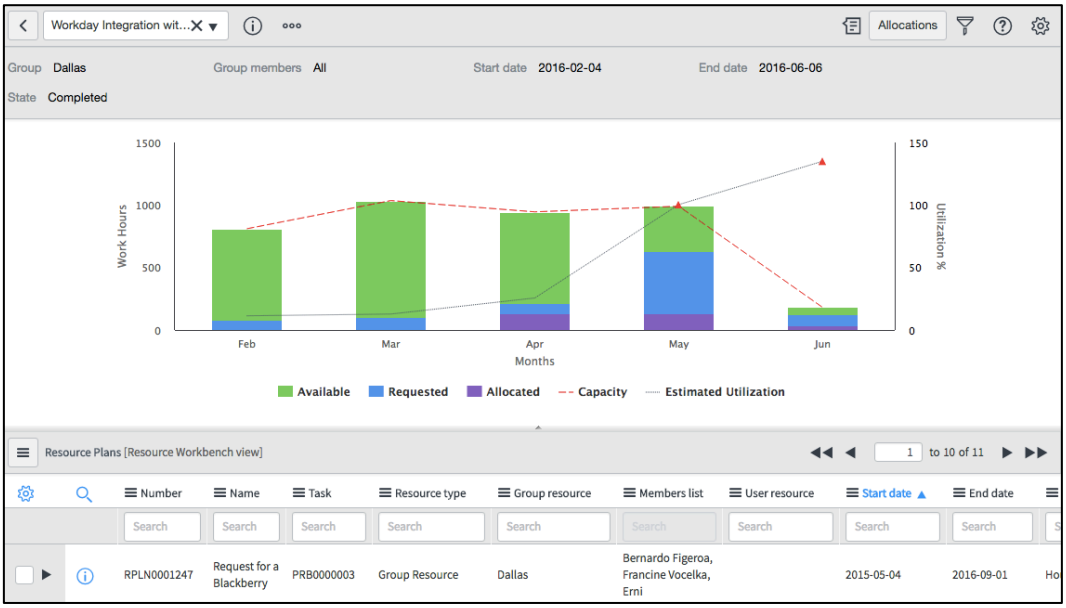
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Allocate and Reject Resource Plans

1. Navigate to the **Resource Workbench**.
2. Select any **Resource Plan** from the **Select Resource Plan** field.



3. Resource Plan request is displayed.

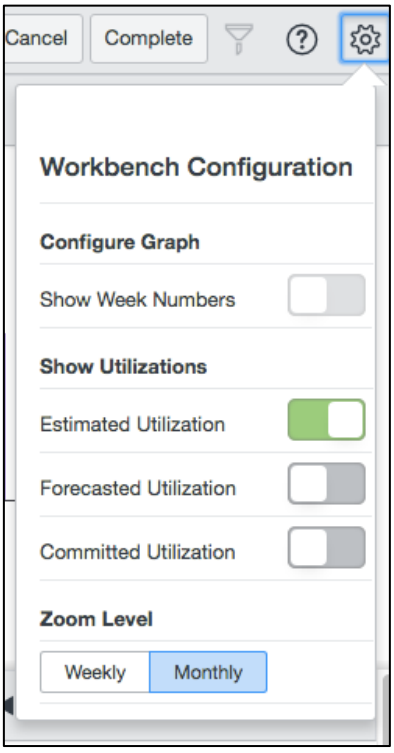


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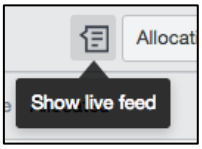
Take note of the following parts of the workbench:

a. Buttons at top right:
   i. Allocations: Appears when Resource Plan has been allocated.
   ii. Allocate: Appears when Resource Plan has been requested.
   iii. Reject: Appears when Resource Plan has been rejected. What do you think happens when a Resource Plan is rejected?
   iv. Cancel: Appears when Resource Plan has been allocated.
   v. Complete: Appears when Resource Plan has been allocated.

b. Settings:



c. Show Live Feed: Live Feed can be used across any record in ServiceNow.



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View Everyone's Availability

The Resource Workbench helps with allocating and rejecting individual Resource Plans, but as an Enterprise PMO or even manager, you want to be able to see what everyone is working on. To do this use a platform feature called **Timeline Pages**.

1. Type **timeline pages** in the Navigation filter and select **Timelines Pages**.

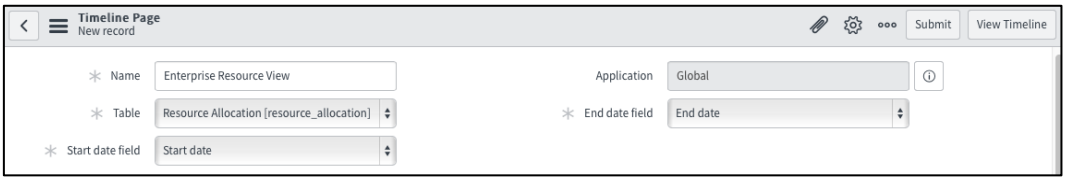


2. Open the **Timeline Page** we created in an earlier lab.

3. Change the **Name** to **Enterprise Resource View**, and right-click on header bar and select **Insert and Stay**.

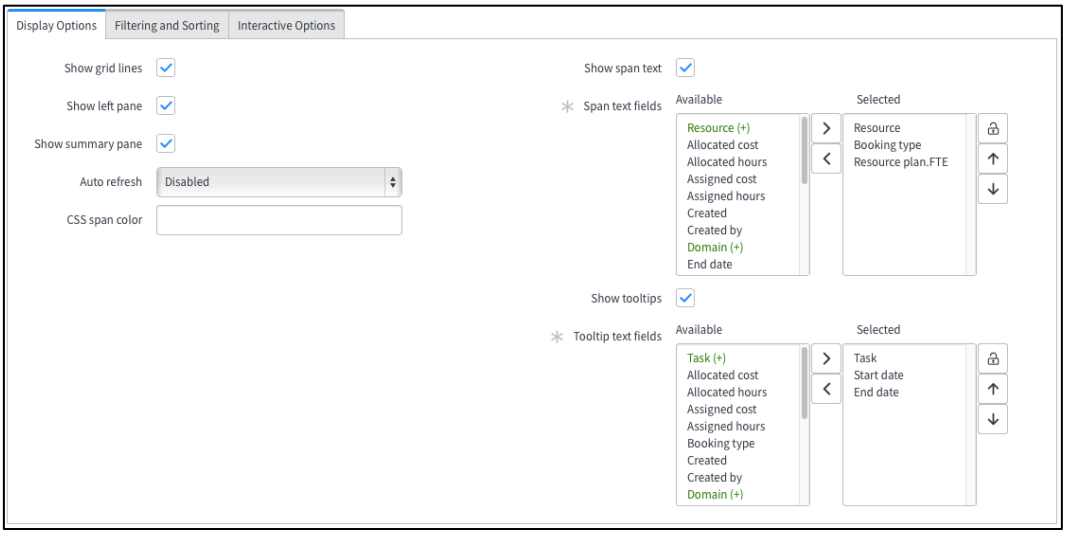
4. Complete the record as follows.

   General Information:



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Display Options:



Filtering and Sorting:

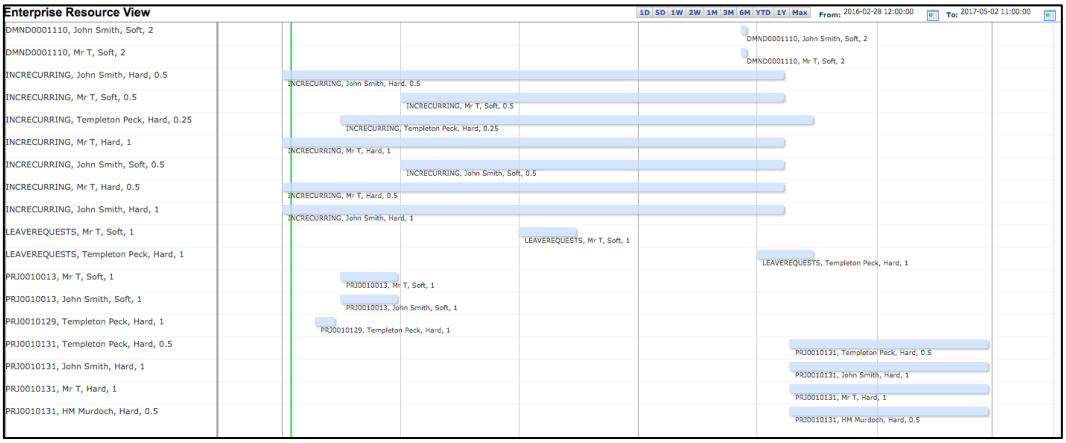
Add all the users you would like to see in the timeline page.

5. Right-click on the header of the record and click **Save**.

6. Click **View Timelime**.



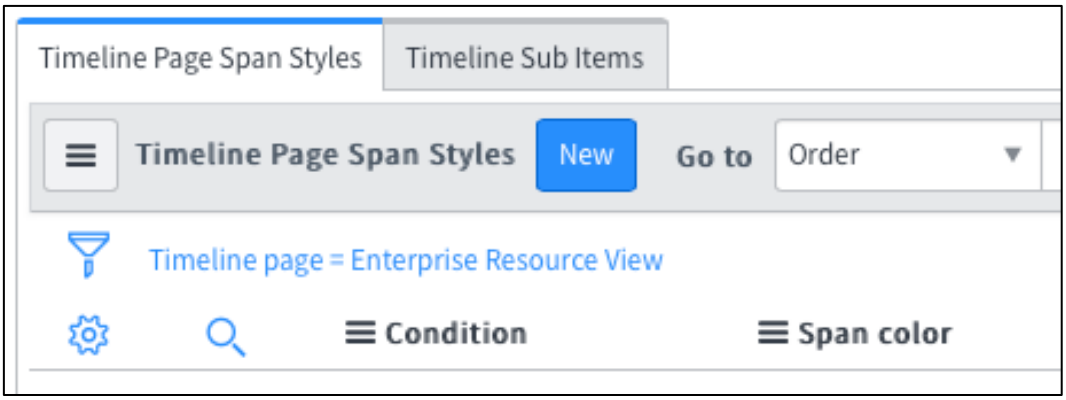
7. The Timeline opens in a new tab in the browser window.



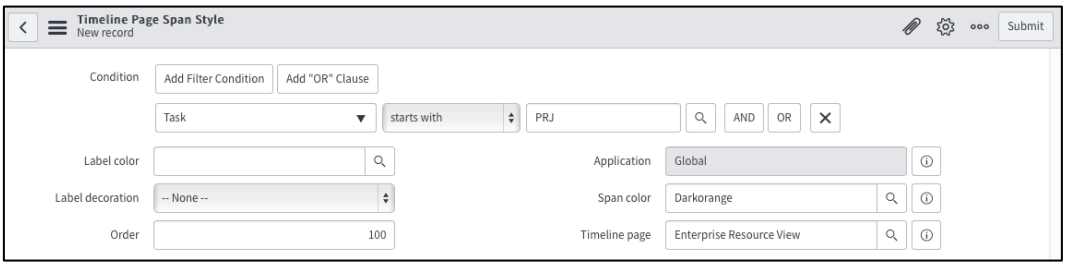
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This example shows the timeline for the one resource spread across multiple activities. The default colors do not make it easy to distinguish the types of activity the resources are working on. You update these in the next few steps.

8. Navigate back to the **Timeline Page** record you have just created.
9. Open the **Timeline Page Span Styles** related list.



10. Click **New** to create a new style.
11. Complete the style record as follows.

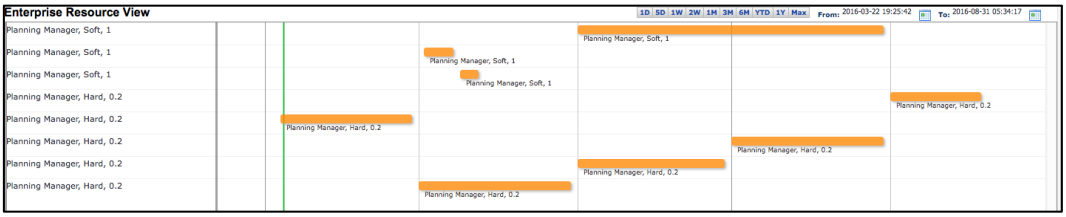


This style shows each PRJ related activity in the color of **dark orange**.

12. Click **Submit**.

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13. Click **View Timelime**. Notice how the spans have changed color.



14. Create more styles:

    - One for Incident records
    - One for Demand records
    - One for Leave Requests. What qualification can you use for this?

    Note: The Span Styles were not copied when we used Insert and Stay.

15. Try opening the Timeline Page again. From a Enterprise PMO perspective, it is a lot easier to distinguish the type of activity being worked on.

Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.

2. Click **I am done!**

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Lab Goal

Bonus Lab 6.0 Manage Demand and Future Planning

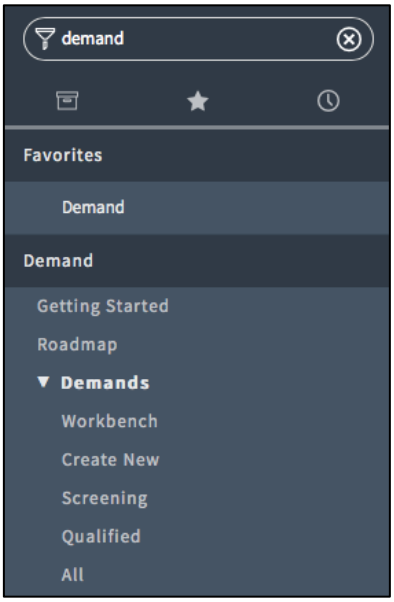
Knowing what your resources are working on is critical to operations and project work, but also very important when it comes to managing future work.

This lab explains how to create a number of Demand records and, using new knowledge about Resource Plans, create Resource Plans to help with resource forecasting.

- Submitting and prioritizing demand
- Raising resource requests for demand
- Review demand versus resources

Submit and Prioritize Demand

1. Impersonate **Lieutenant John Smith**.
2. Type **demand** in the Navigation filter. Navigate to **Create New** under **Demands**.



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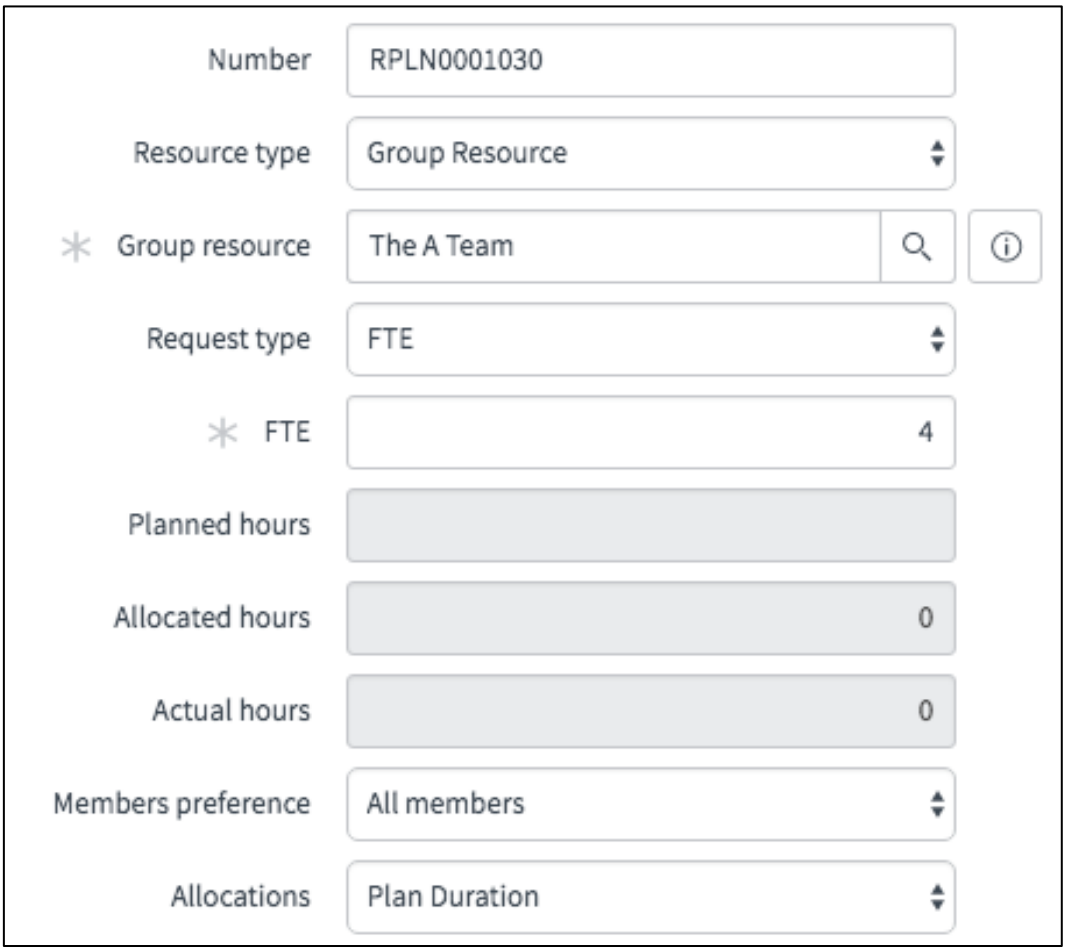
3. Create three Demand records with the following **Short Descriptions** (the Start and End Dates will be used in Resource Plans):
    - **Team Building (September 15-20 2016)**
    - **Off-Site Training (November 23-25 2016)**
    - **Xmas Party Weekend (December 23-27 2016)**

Raising Resource Requests for Demand

1. For each record create a **Resource Plan** with the following details:
    - Resource Type is **Group**
    - Group is **The A Team**
    - Request Type of **FTE**
    - FTE of **4** (Why is this 4 and not 1?)
    - Members preference is **All members**
    - Allocations is **Plan Duration**

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- Start and End Dates from Step 3.



Note: Fields in the right column will be populated when the Resource Plan is created from the Demand record.

2. Once created, view the new Resource Plans in the Timeline Page.

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Review Demand Versus Resources

1. Navigate to **Timeline Pages**.
2. Find the **Enterprise Resource** View, and view the timeline. Notice that there are now rows for the demand records.



Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.
2. Click **I am done!**

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