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Lab Guide

Resource Management with a Side of Demand

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Lab instance: https://<<name>>.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

To kickoff our lab, you will impersonate company users/resources in your ServiceNow instance and setup their schedules accordingly. The admin will be using the Weekend schedule while the rest of the team will be working standard 8 to 5 hours with an hour lunch break.

Lab 1
Setting Up Your Schedule

Log on to Your Training Instance and set your Schedule.

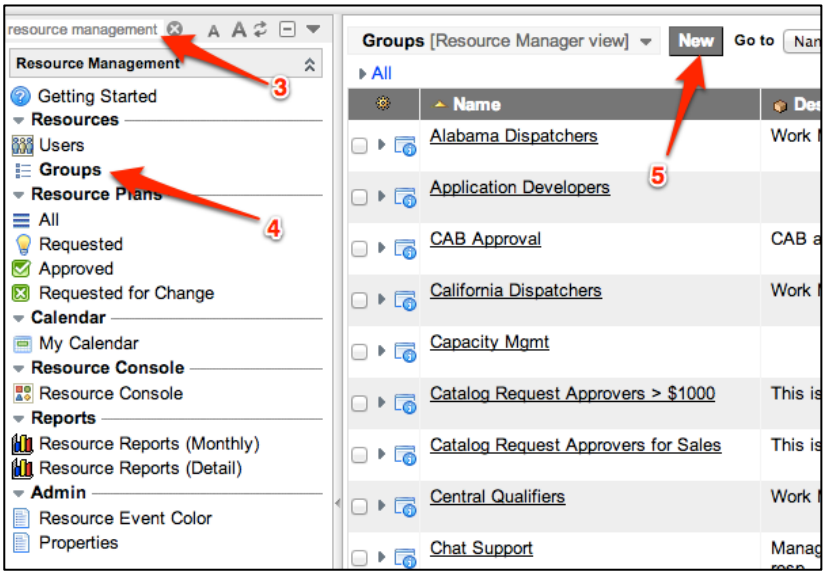
1. Your instance URL is on the cover page.

2. Login using the **admin** credentials provided on the cover.

3. Scroll down to the Resource Management application or type Resource Management in the Type Filter text bar.

4. Click on the **Groups** module.

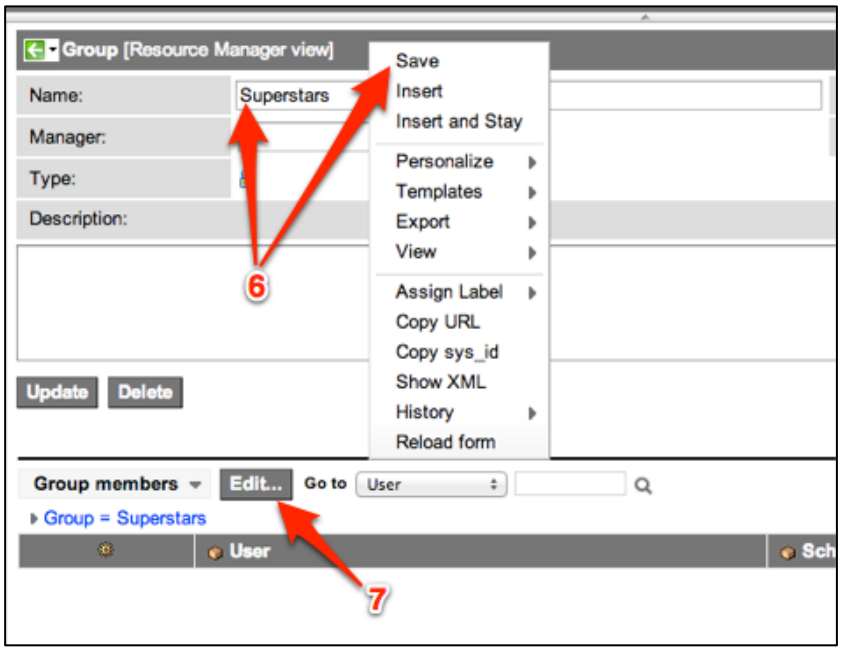
5. Click **New** at the top of the table.

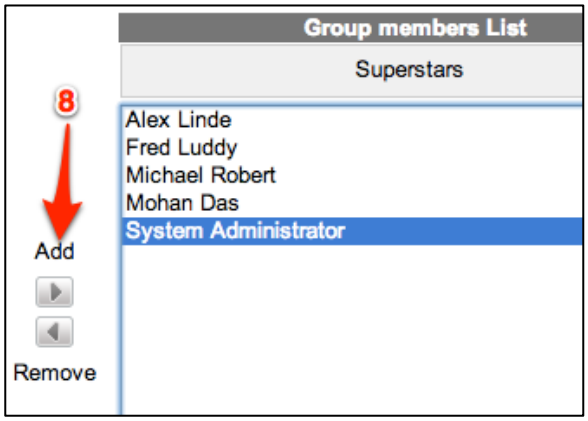


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6. Type in Superstars for the Group Name and right click on the top bar to **Save**.

7. Click **Edit** on the Group Members Related List.

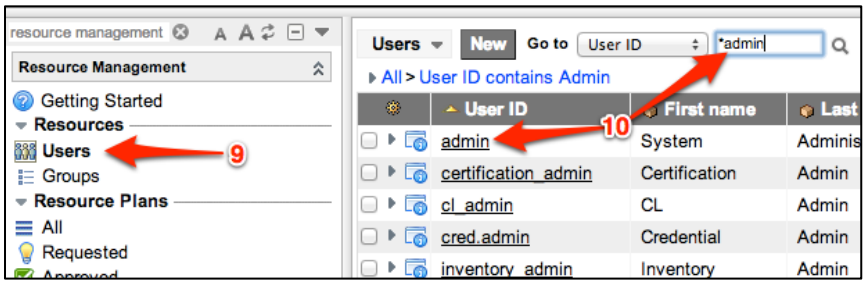




8. Add the following people to the Superstars Group – Alex Linde, Michael Robert, Mohan Das, Fred Luddy and yourself (System Administrator). *These users come with Resource Management Demo data, if not present please load.

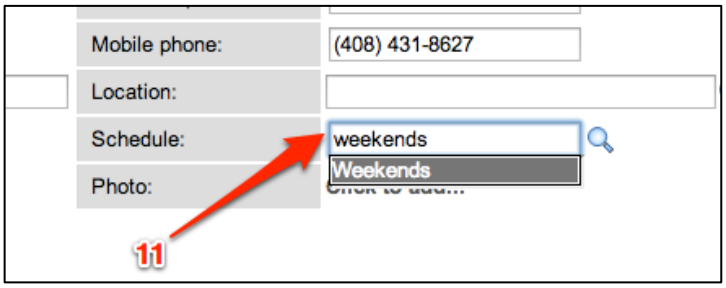
9. Next click on the **Users** module in the Navigation Menu.

10. Search for *admin (yourself) in the table and click the System Administrator record.



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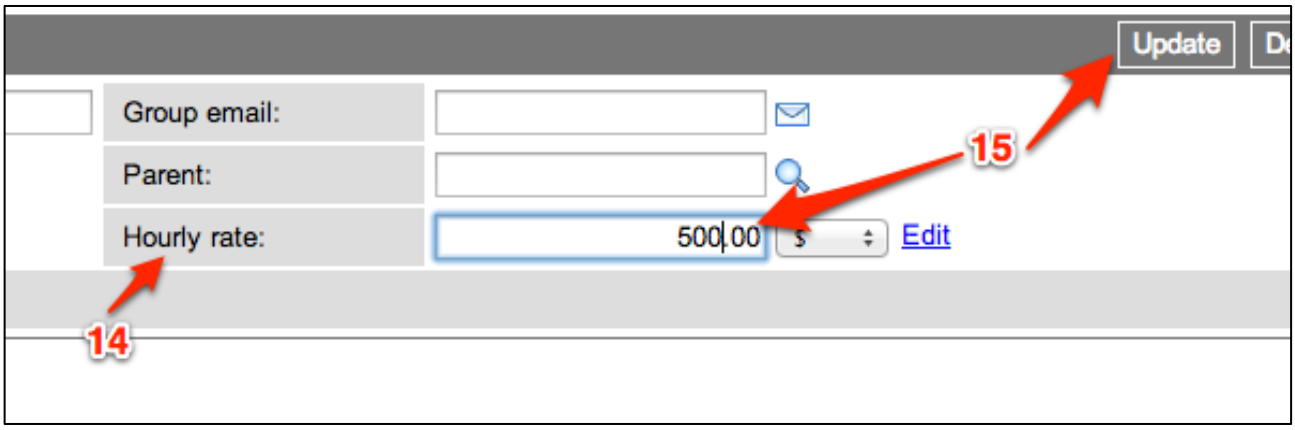
11. Associate yourself with the Weekend schedule in your user profile (you hard worker you).



12. Note – By Default, all users and groups follow the Resource Management Schedule, Monday through Friday 8 to 12, 1 to 5. This can be adjusted in the Properties Module of the Resource Management Application. Individual users can adjust which schedule they adhere to in their User profile like we just demonstrated.

13. Go back to **Groups** under the Resource Management application and select the Superstars group we made in Step 6.

14. Personalize the form layout and add the Hourly Rate field to display as below.



15. Enter the rate of 500 dollars per hour (after all, this is the Superstars team) and **Update** the record.

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Lab Goal

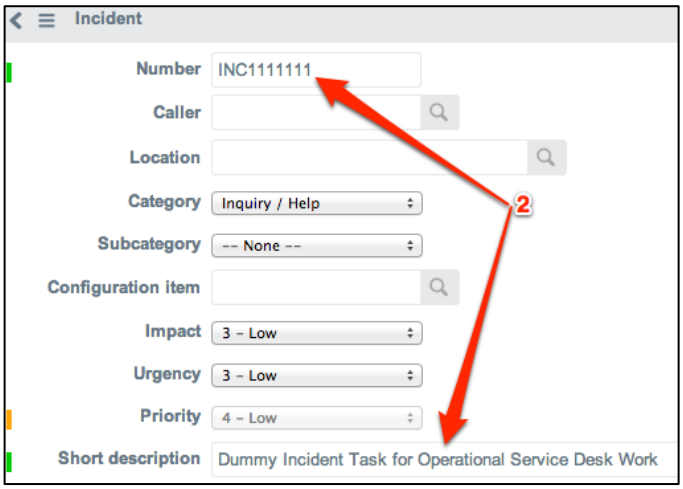
In this portion of the lab we will block off a portion of our day/schedule to allocate for recurring operational tasks that don't necessarily have a start and end date. We'll also see other types of events that we can reserve from an allocation point of view.

Lab 2
Allocate Recurring Tasks

Allocate time for Operational Tasks

1. Go to the Incident application and **Create New.**

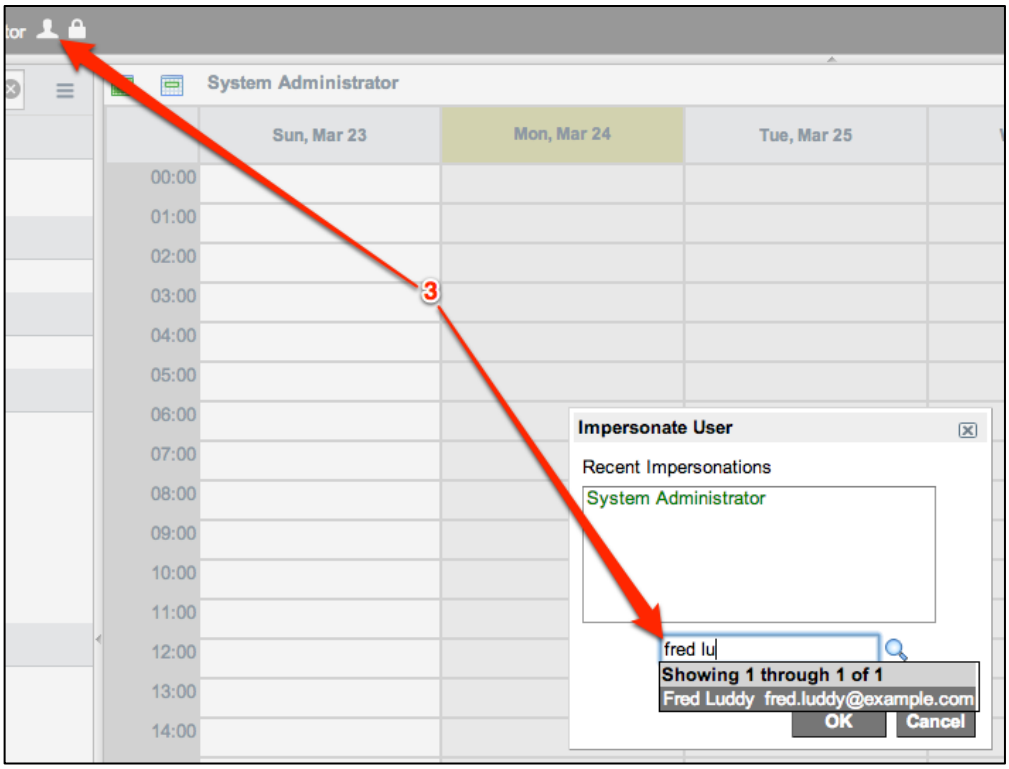
2. Create a dummy Incident for Reporting purposes that any User or Group can reuse for general Service Desk Operational use. Enter INC1111111 for the number and fill the short description out as shown.



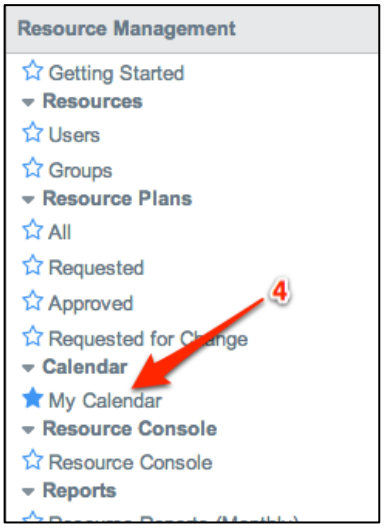
*Right now, this is the best way to block operational time for allocation and reporting purposes. Actuals can be rolled up via Time Cards to give the exact time worked for the User on the exact Task.

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3. Let's impersonate Fred Luddy and block out two hours a day (weekdays) for him to work Incidents (Fred still likes to get his hands dirty in ServiceNow). Click the Impersonate User icon next to System Administrator in the menu bar and type Fred Luddy for the user.

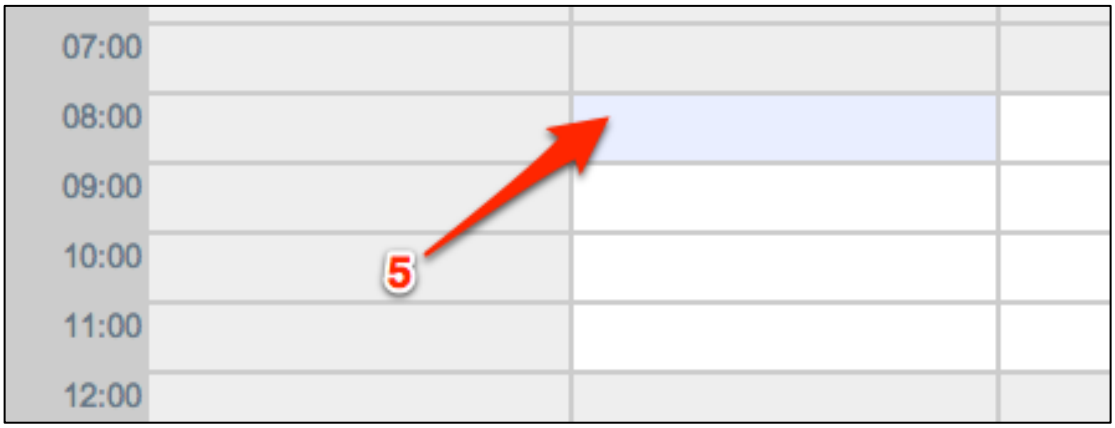


4. Now that you're impersonating Fred, click on **My Calendar** in the Resource Management Application.

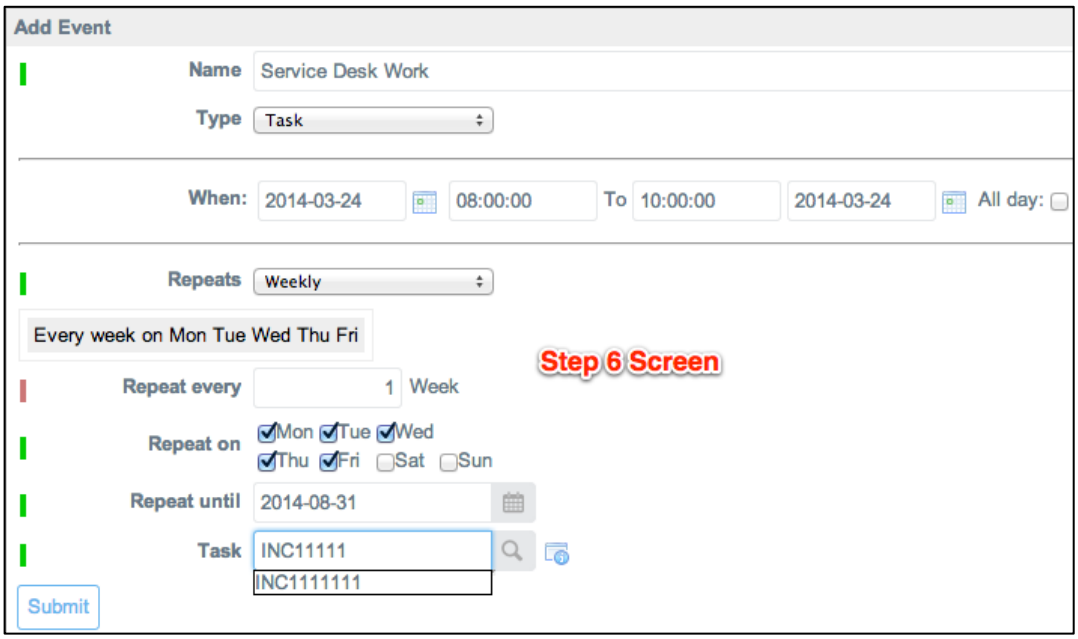


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5. Select the white block representing the 8 to 9 Monday timeslot on the calendar by clicking it.



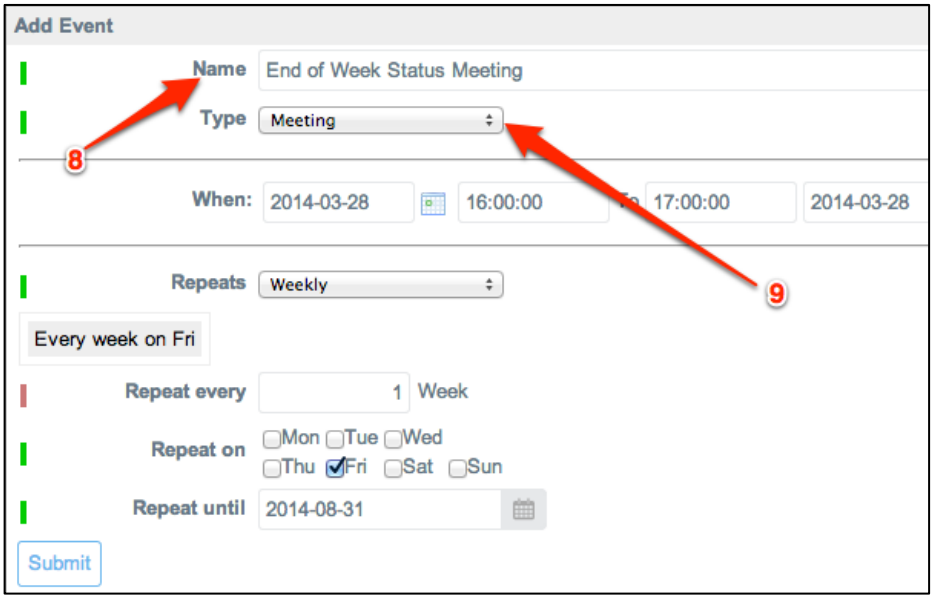
6. Add 2 hours a day to Fred's calendar for Service Desk work by selecting Type **Task**, changing the to time to 10:00:00, repeating the event **Weekly** every workday until 2014-08-31 and associate it with the Dummy Incident task we created in step 2. It should look like the following when completed.



7. You should now see a repeating blue Task in Fred's schedule from 8 to 10 every Weekday.

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8. Let's also add in an end of week status meeting for Fred from 4 to 5 every Friday. Click the 16:00 to 17:00 timeslot on Friday in Fred's calendar and type in End of Week Status Meeting.

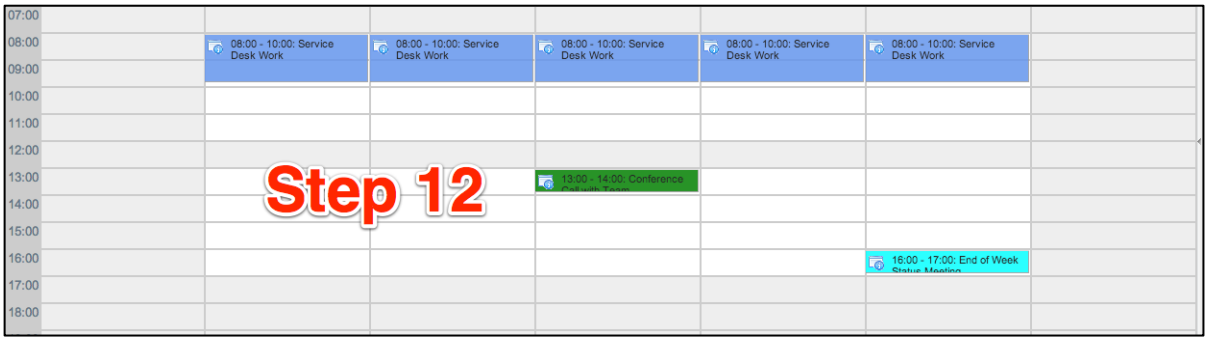


9. Select **Meeting** for the event type. Notice users can also block off Time off, Appointments and Phone Calls as event types as well. *Note: We saw type Task in step 6.

10. Fill out the rest of the Event to match the Picture above.

11. Small Challenge – Add in an Event of Type **Phone Call** to repeat weekly every Wednesday from 1 to 2.

12. When you think you've got it, double check to make sure Fred's calendar displays like the picture below.



13. Log back in as the System Administrator by hitting the impersonate icon again and choosing System Administrator. The section of allocating operational tasks is now complete!

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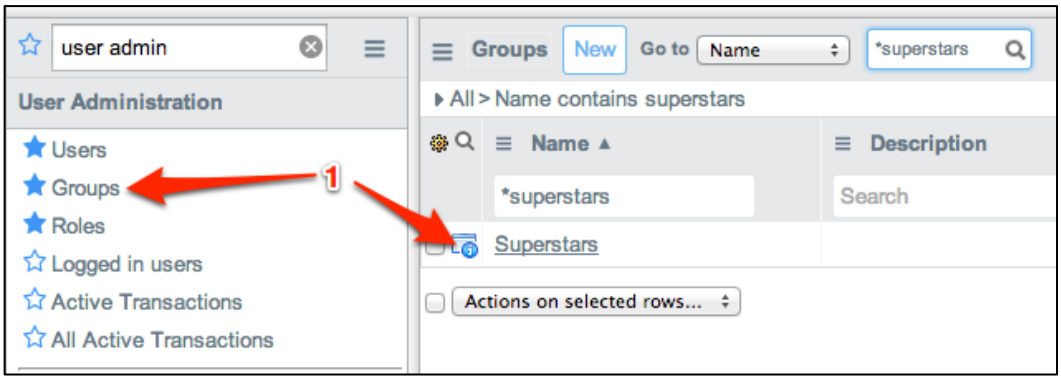
Lab Goal

Here you will impersonate Michael Robert, a Resource User on our Superstar team. While acting as Michael, you will submit an idea for a project through the global Service Catalog and allocate a Resource Plan for that project against the Superstars group.

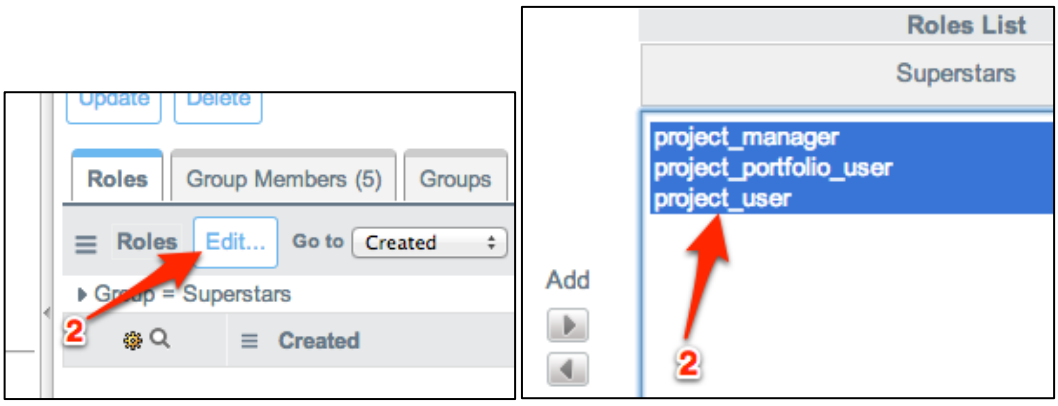
Lab 3 Create Resource Plan from PPM

Setup Group Privileges and Adjust Project Form

1. First, let's give the Superstars group access to the Project Application. Click on **Groups** under the User Administration Application, search for *Superstars and click into the record.



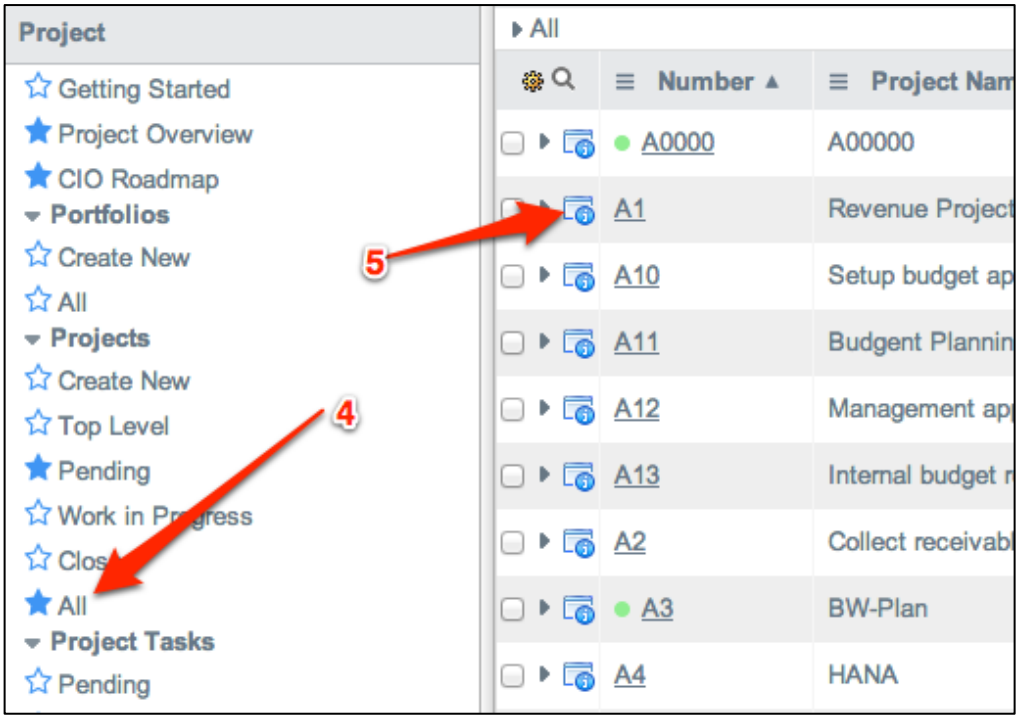
2. On the roles tab of the record click **Edit** and add in **Project Manager**, **Project User** and **Project Portfolio User** roles**.**



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3. **Save** the Related List and **Update** the Superstars group record accordingly. *Anyone in our Superstars group should now have access to the Project application.

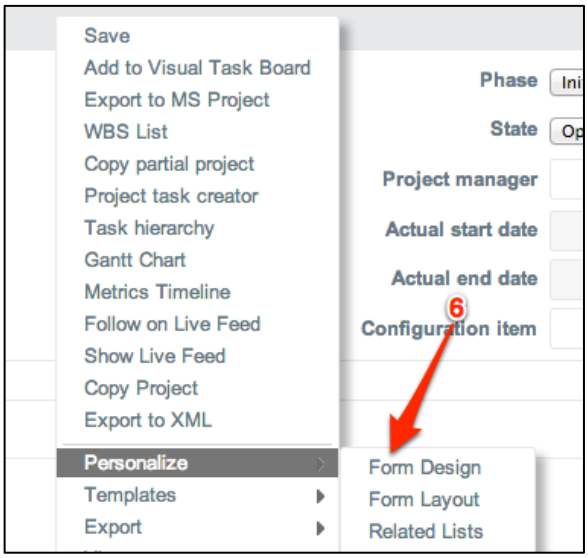
4. Now let's add a field to the project form which will auto-populate a field in the Resource Plan later. Go to the Project application and click **All** Projects.



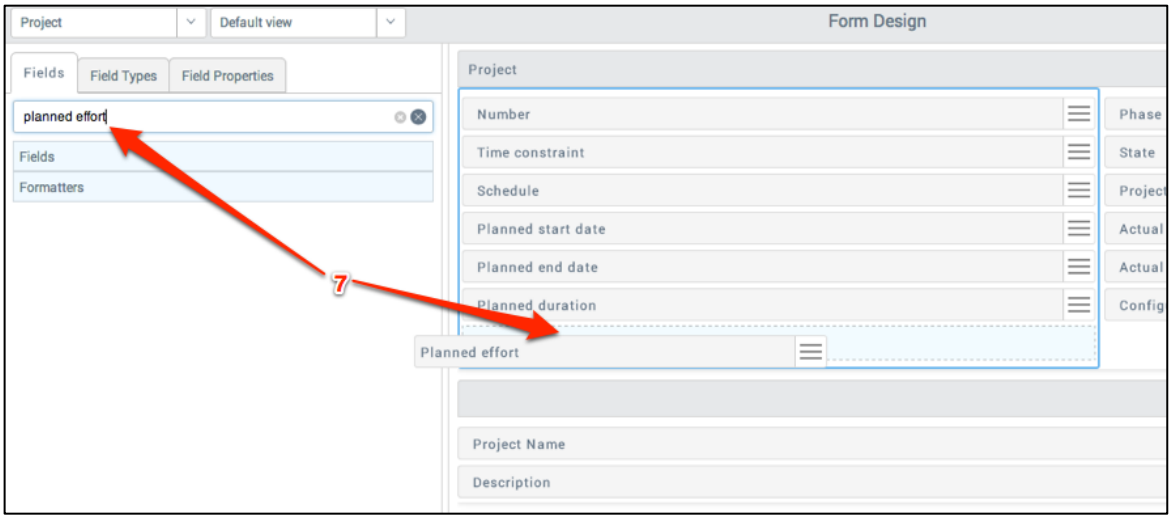
5. Click on any project in the list.

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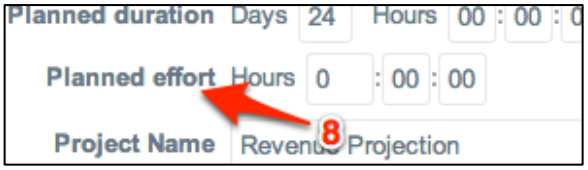
6. Right click the Project Menu bar and select **Personalize -> Form Design**.



7. From the new Form Design page, filter on *Planned Effort* on the left hand side, drag and drop the field under Planned Duration and **Save** the form.



8. Refresh the project page to see the newly added Planned Effort field.

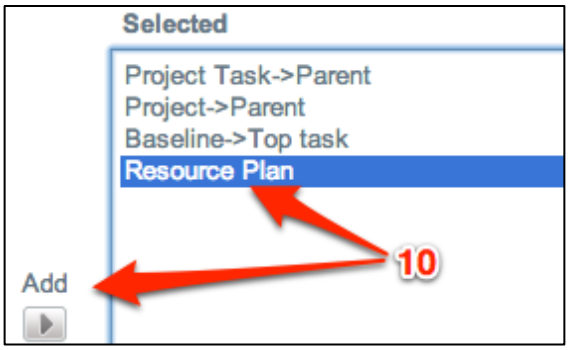


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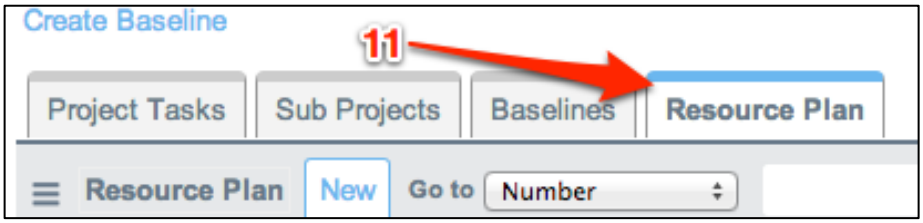
9. Right click the Project Menu bar again but this time select **Personalize -> Related List.**



10. Find Resource Plan in the Available section and **Add** it to the Selected section to show like this.
    *If it's already on your Selected list no need to add it.



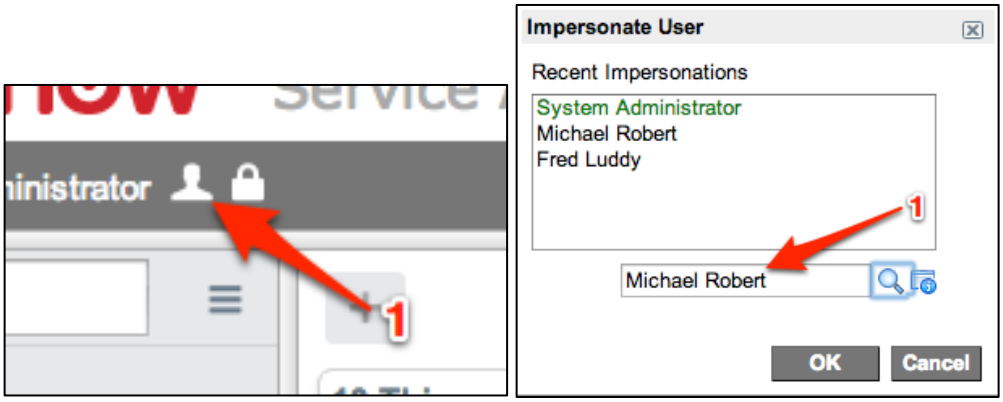
11. Hit **Save** to see the new Resource Related list appear on the Project From



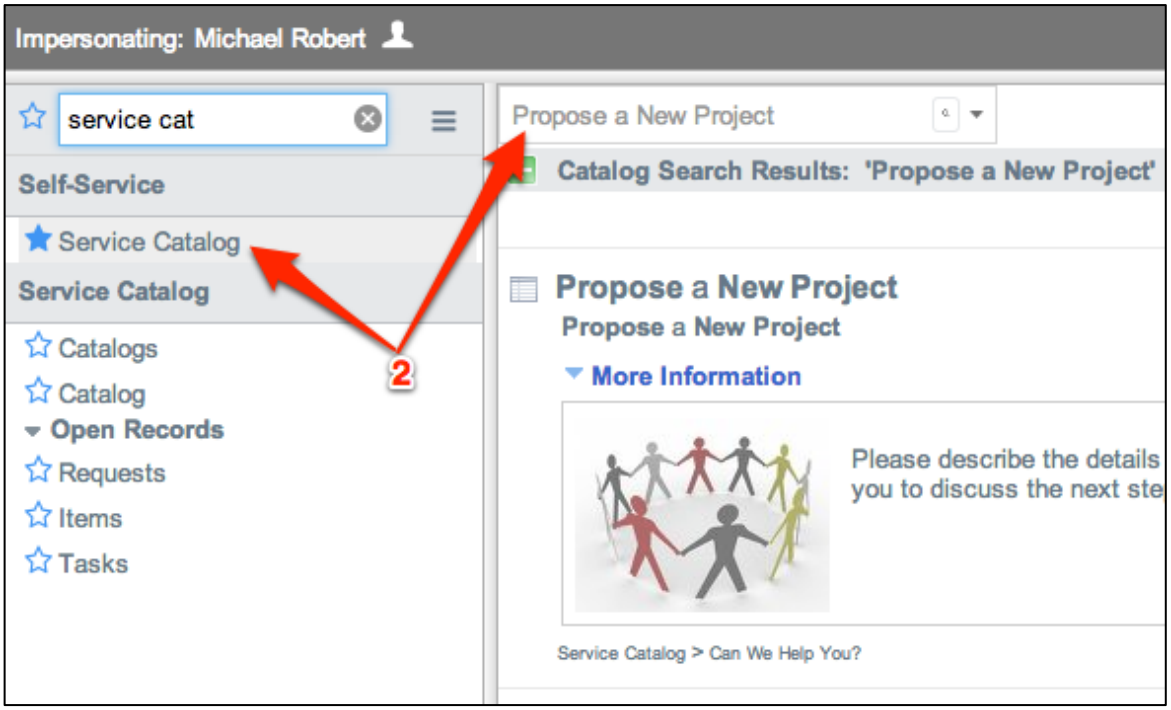
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Submit a Project through Service Catalog & Add a Resource Plan

1. Impersonate Michael Robert by clicking the Impersonate User Icon.

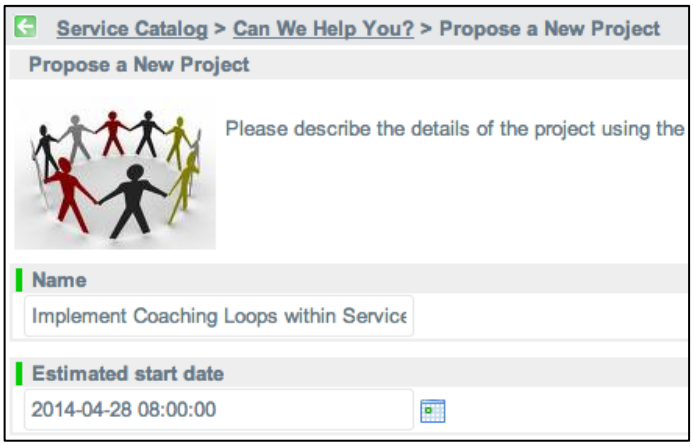


2. Click on **Service Catalog** under the Self-Service application, search for **Propose a New Project** and click into the Catalog Item that comes up**.**

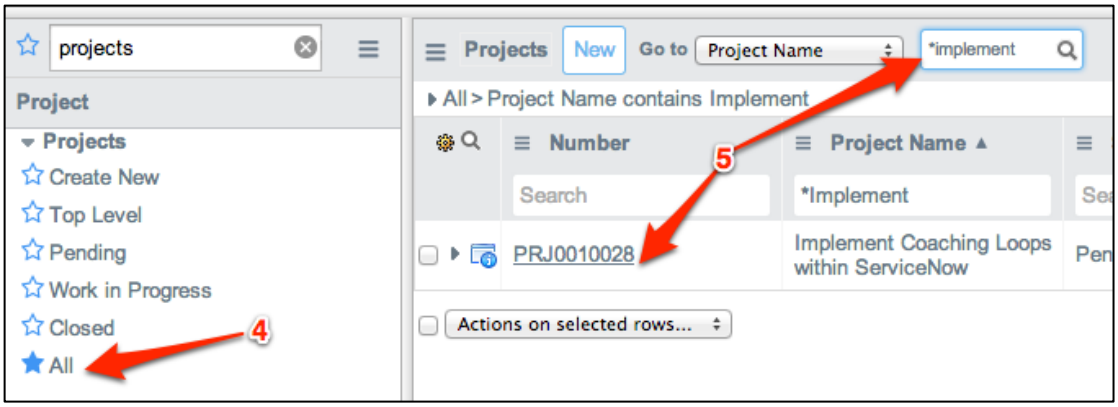


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3. Fill the Fields out as follows and click **Submit**.



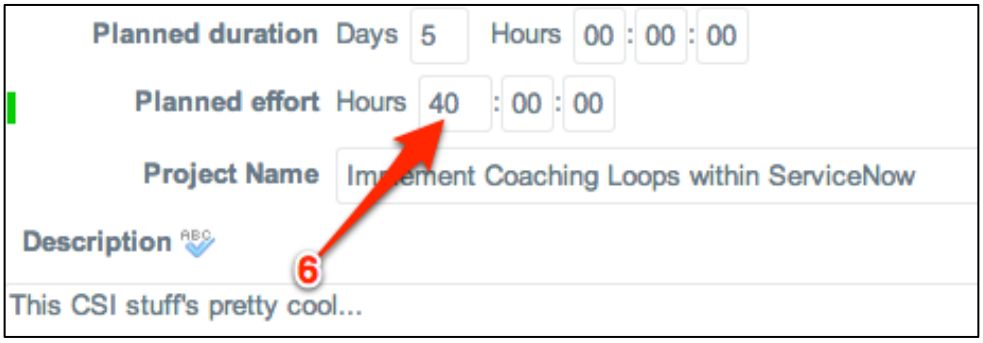
4. Go to **All** projects under the Projects application.



5. Search for the Project Name we just submitted by typing ***Implement** in the search bar and click into the newly submitted project record.

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6. Since the project is going to take a week to build, test and implement, enter in 40 hours for the planned effort and save the form.

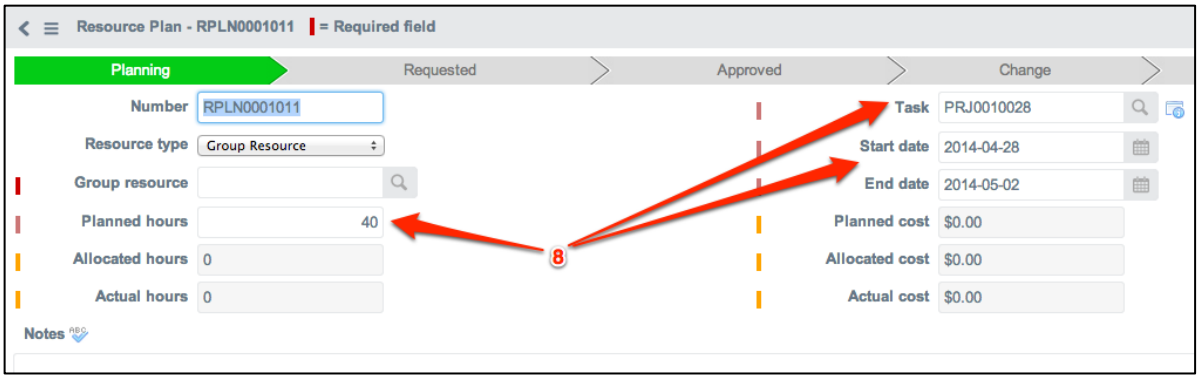


*Note: For more information on building out the different areas of Project, sit in on the PPM labs and visit https://wiki.servicenow.com/index.php?title=Project_Management.

7. Scroll down to the Resource Plan related list (which we added in earlier) and click **New**.

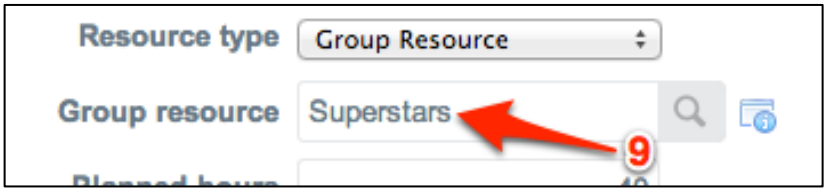


8. This is the Resource Plan form. Notice that the Task, Start/End Date and the Planned Hours get brought in for us automatically from the Project.



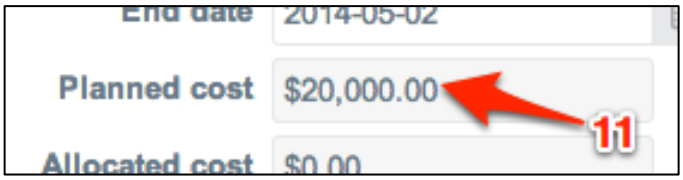
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9. Since our Superstars team handles everything ServiceNow, plug them in as the Group Resource for whom we'd like to allocate to this Project.



10. Right click at the top to **Save** the resource plan. Challenge: Notice any fields change?

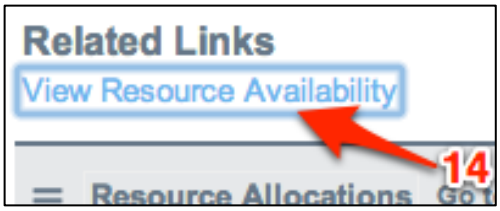
11. Spoiler Alert: The Planned Cost for the resources was automatically calculated based on the Group's Resource hourly rate and the Planned hours or effort that this plan is going to take.



12. Go ahead and hit the **Request** button to place the plan in a Requested state (which we can see from the process flow formatter at the top of the form) for the Resource Manager to allocate the Superstar team accordingly later.

13. The user we are currently impersonating, Michael Robert, only has the resource_user role. He still has access to view the resource availability of the plan he's submitting but will not be able to allocate the Users because he does not have the resource_manager role (we will walk through this later).

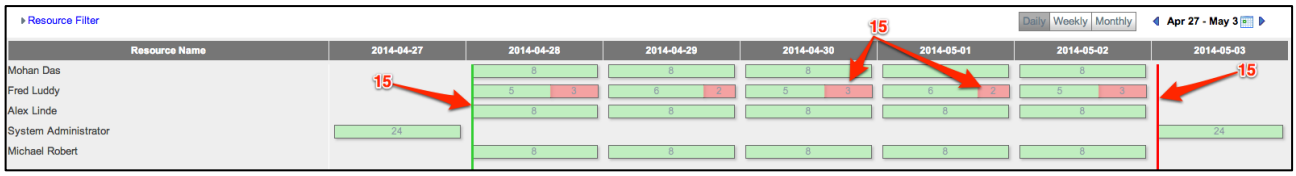
14. Click the **View Resource Availability** related link on the plan form.



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15. This should open up a Resource Console in a separate tab or window with the users in the Superstar group listed and their current allocated hours. Couple things to note…

- There are Green and Red bars encapsulating the timespan of the resource plan. If the resource manager tries to schedule a user outside the given span, he/she will get a popup notifying them to allocate the user within the required dates.
- Fred has some recurring red areas of his calendar. Perfect! That's what we blocked off in his calendar earlier in Section 2. The resource manager will be able to drill down in to these red areas to get more detail.
- The System administrator has a different schedule than everyone else. Perfect! We associated the admin with the Weekends schedule in Section 1.



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Lab Goal

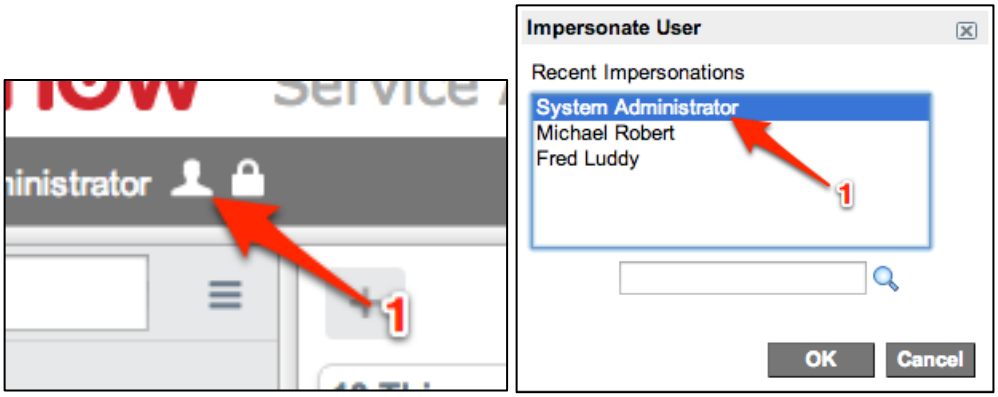
The beauty of the ServiceNow platform and by nature the applications within platform (for our purposes Resource) is the seamless integration throughout all the applications. We just stepped through an example of creating a Resource Plan for a Project, where Resource allocation is a natural fit, but what about other apps on the Platform?

In this section of the lab, we will create a Change Record and then submit a resource plan to check the allocations of the Superstars team to actually complete the Change at the requested time.

Lab 4 Create Resource Plan from Change

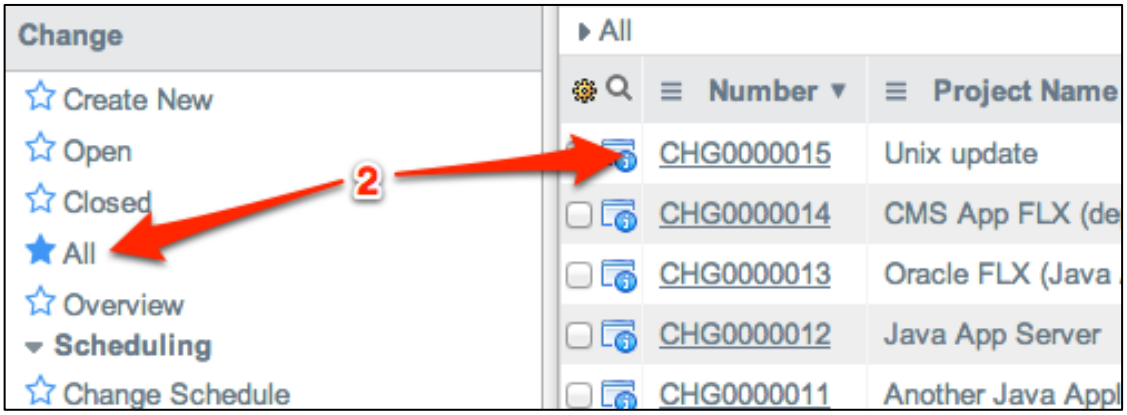
Add Resource Plans to Change (if not already there)

1. Log back in as the System Administrator by clicking the Impersonate Icon and selecting System Administrator.

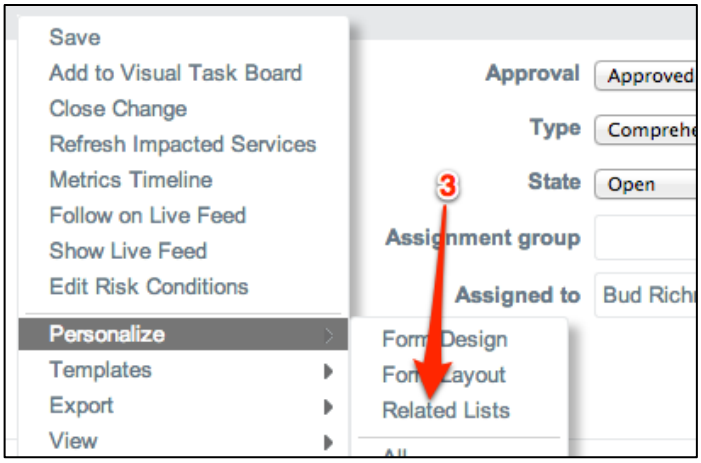


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2. Go to the Change application, click the **All** module and select any change record with they type of Comprehensive in the associated table.

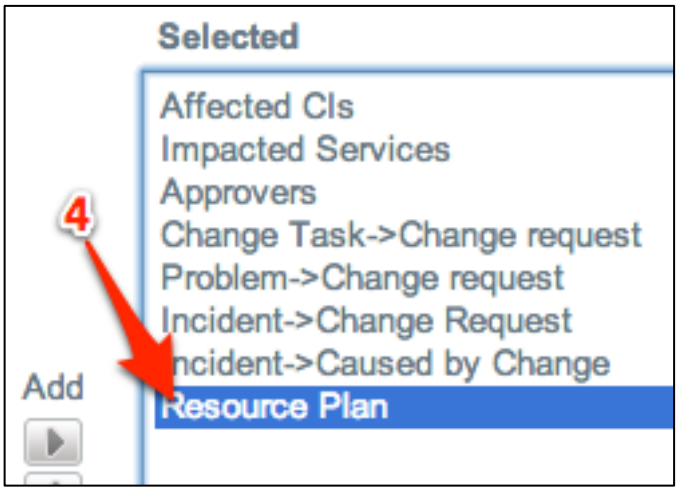


3. Once in the Change record, right click top menu bar and **Personalize -> Related Lists.**

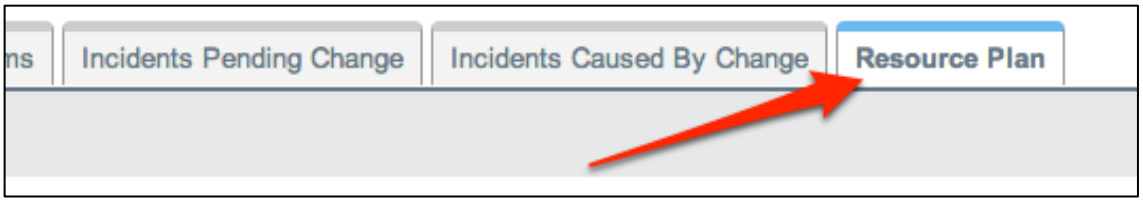


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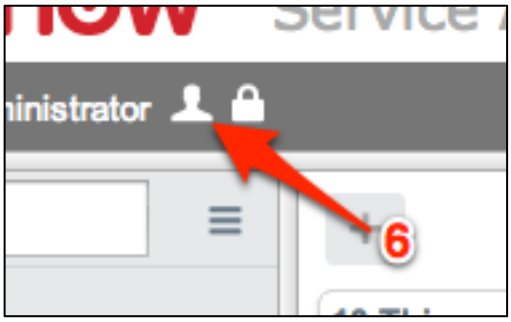
4. Bring over **Resource Plans** from the Available list to the Selected List and **Save**.

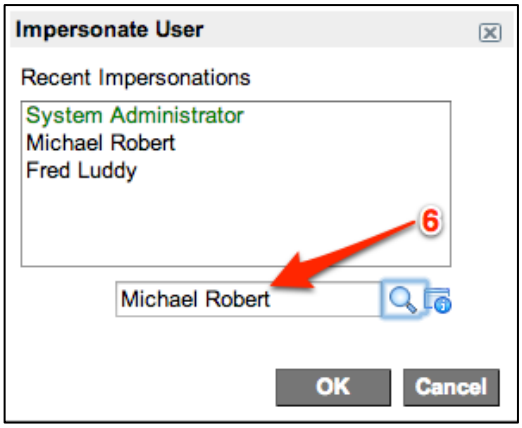


5. Verify that the Resource Plan related list shows up at the bottom of the Comprehensive Change record.



6. Impersonate Michael Robert once again.



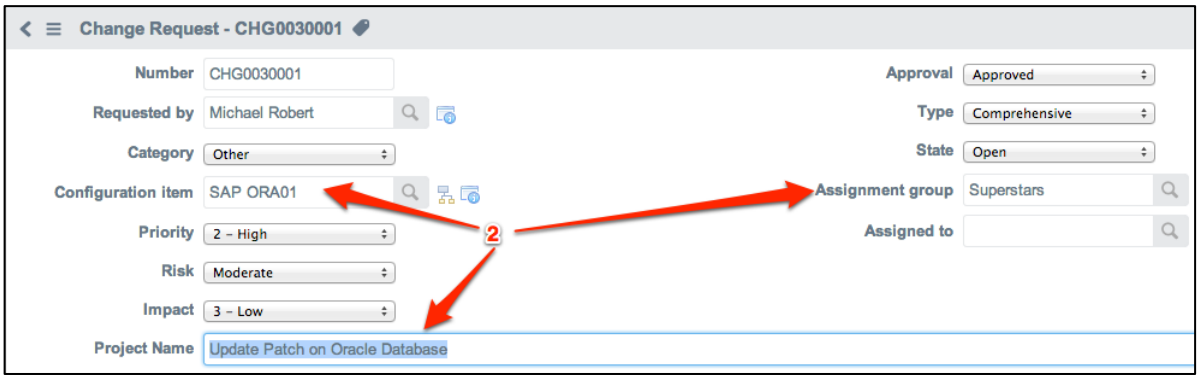


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Submit a Change and Allocate a Resource Plan to it

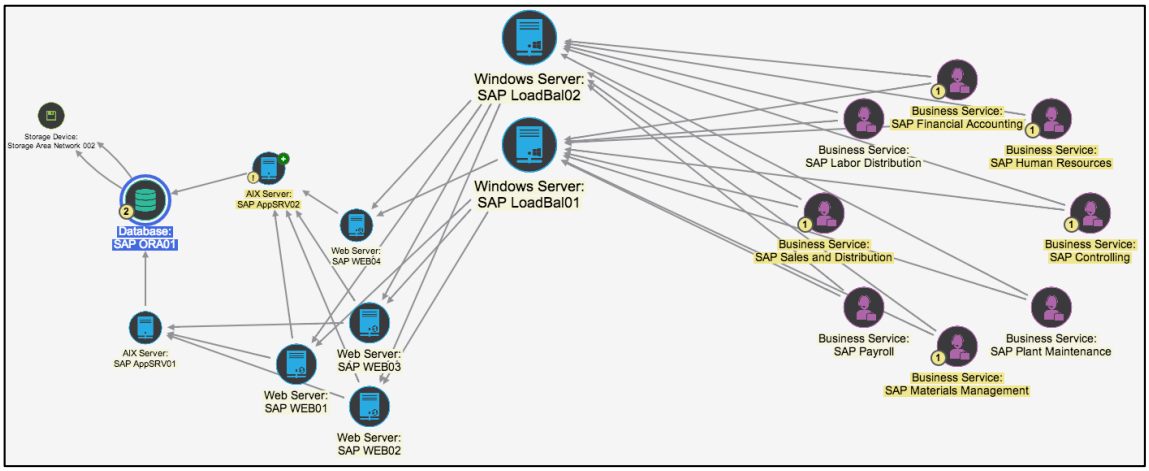
1. Go the Change application and hit **Create New.**

2. Set the configuration item to *SAP ORA01*, the project name to say '*Update Patch on Oracle Database*' and the assignment group to our beloved *Superstars*. It should look like the diagram below when completed. Right click and **Save** the form.



3. Now might be a good time to admire the sweet new Business Service Map in Eureka if you haven't seen it already. Click on the BSM icon next to the Configuration item field and admire its beauty.

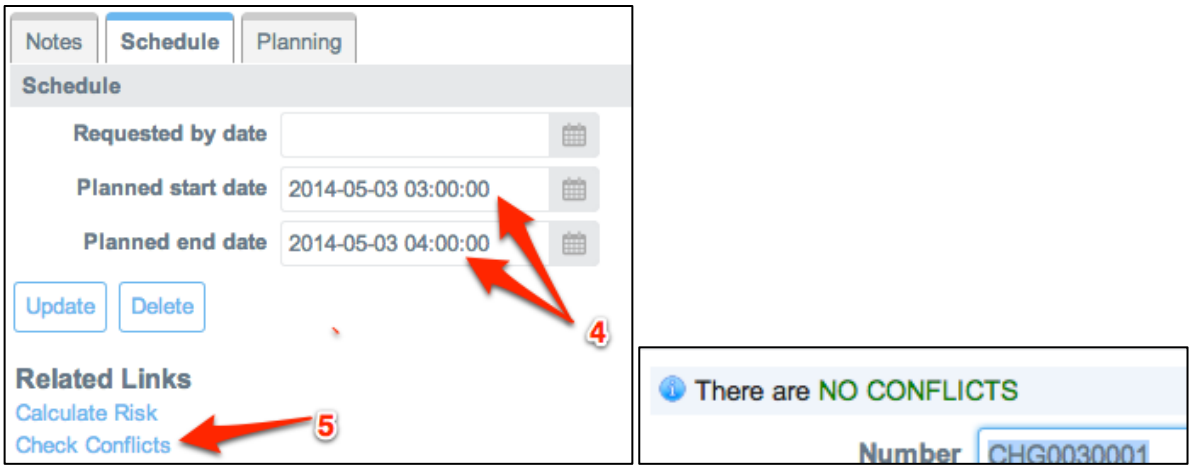




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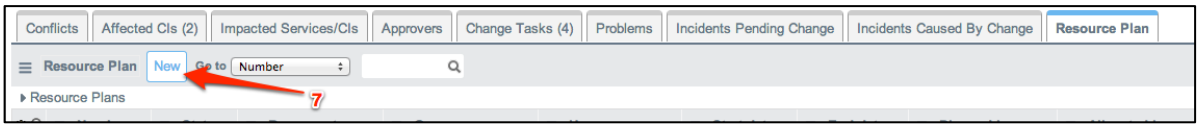
4. After you've familiarized yourself with the new BSM, go back the change record and adjust the change schedule to match the following.

5. Hit the **Check Conflicts** related link and ensure it displays NO CONFLICTS at the top in Green.

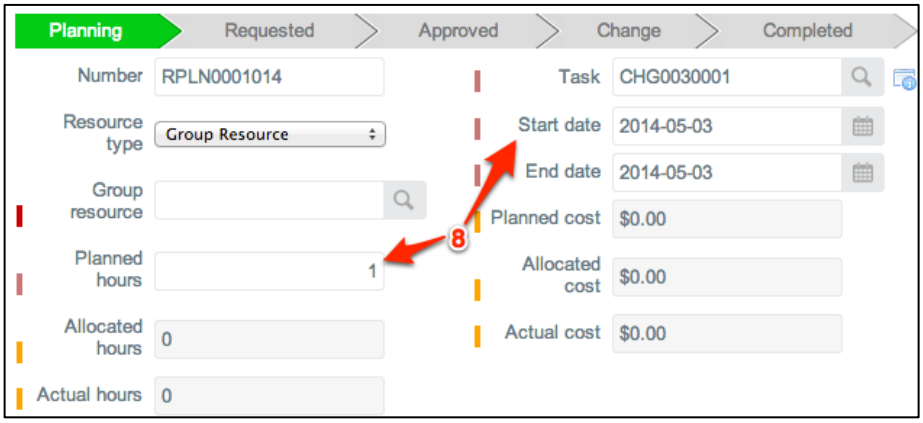


6. Now it's time to see what Resources on the Superstar team can help at this time…

7. Go to the Resource Plan related list at the bottom of the Change record and click **New.**



8. Notice once again that the Resource Plan is automatically populated with Information from the change.



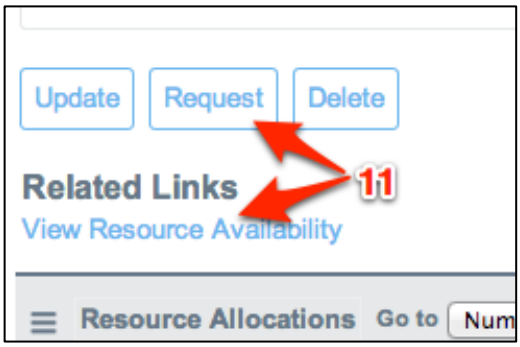
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9. If we update the Group Resource with the Superstars team, what would we expect when we **Save** the plan?

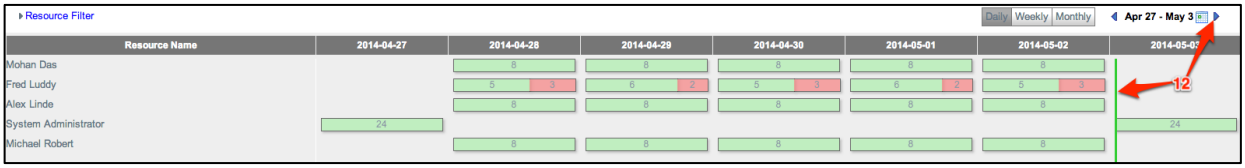
10. If you guessed a Planned Cost of $500 bucks, you guessed right!



11. Hit the **Request** button to submit the Plan and **View Resource Availability** once again.



12. Depending on when you're taking the lab, you may have to adjust the Dates displayed on the Resource console by scrolling the timeline on the upper right portion of the screen. Adjust accordingly until you see the start date of the Change visualized by the Green bar.



13. That's how easy it is to create Resource plans in another application within ServiceNow, next we'll walkthrough the Resource Managers process and workflow.

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Lab Goal

In this portion of the lab we will walk through what it takes to allocate users to multiple resource plans, we will see what the Resource Process flow looks like and get familiar with how a Resource Manager would use the application.

A. Approval/assignment of the work
B. Re-assignment if Conflict

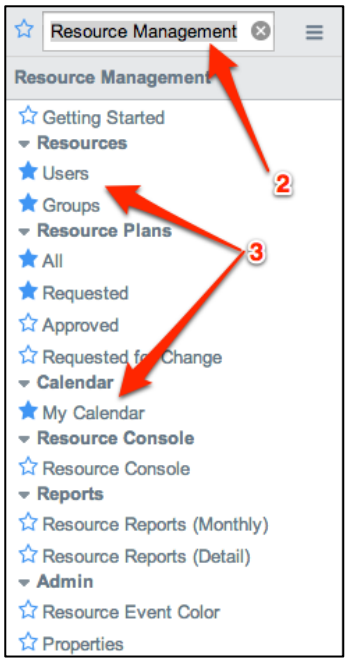
Lab 5 Resource Plan Workflow

Getting to know the Resource Application and Flow with Project

1. Go back to impersonating the System Administrator. This user will have resource_management access to the Resource application.

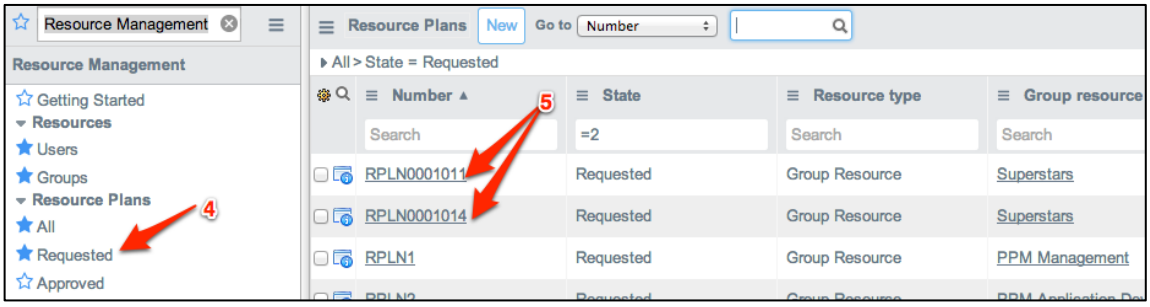
2. Type *Resource Management* in the type filter text area to narrow down the application list to just Resource.

3. Here we'll see a couple Modules we're already familiar with including Users, Groups and My Calendar which we edited earlier for Fred Luddy.



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4. Under the Resource Plans section, click **Requested** to see the resource plans in the requested state.



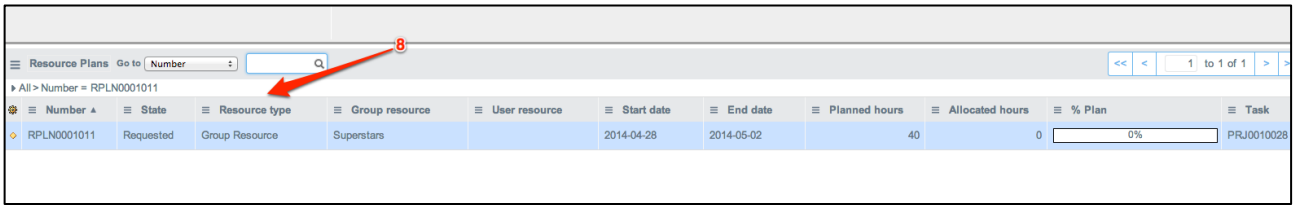
5. Within this list, we should see the two plans we requested while impersonating Michael Robert.

6. Let's first click in to the plan associated with the Project, it should have a value of 40 Planned hours in the list view (for me this is RPLN0001011).

7. This form is already familiar to us because we were able to view it as Michael when submitting it. Click the **View Resource Availability** related link to open up the Console.

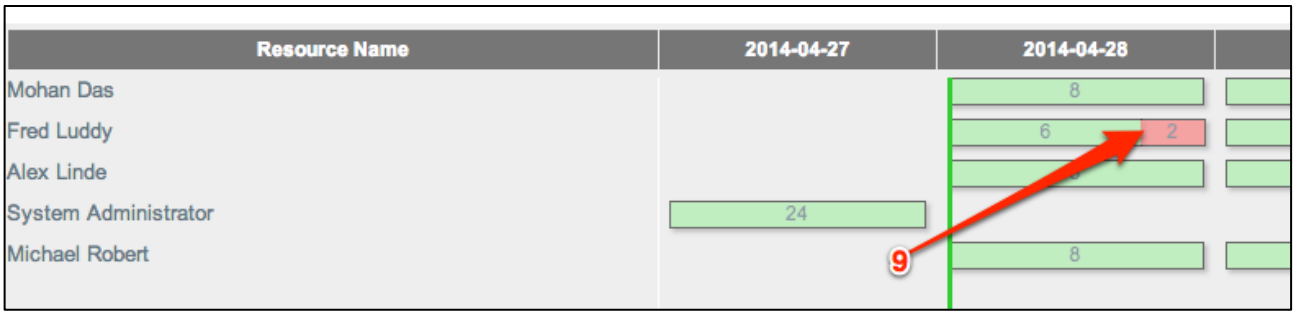


8. Notice because we have resource_manager privileges, we can now see the Resource Plan allocations at the bottom of the Console view. We are also now able to click on the individual users' calendar to check their availability.

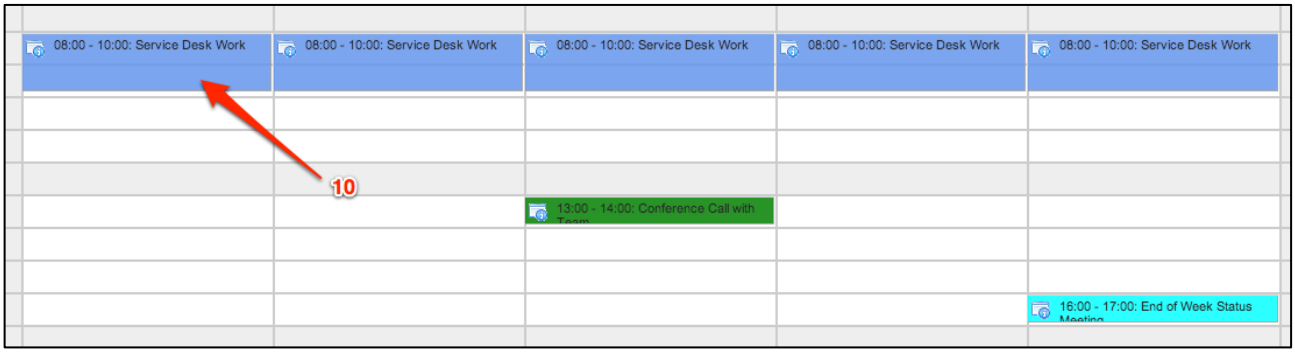


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9. Furthermore because of our resource manager role, we can view more details on the individuals that we're trying to schedule. Click the 2 hours of red time for Fred Luddy on 2014-04-28.

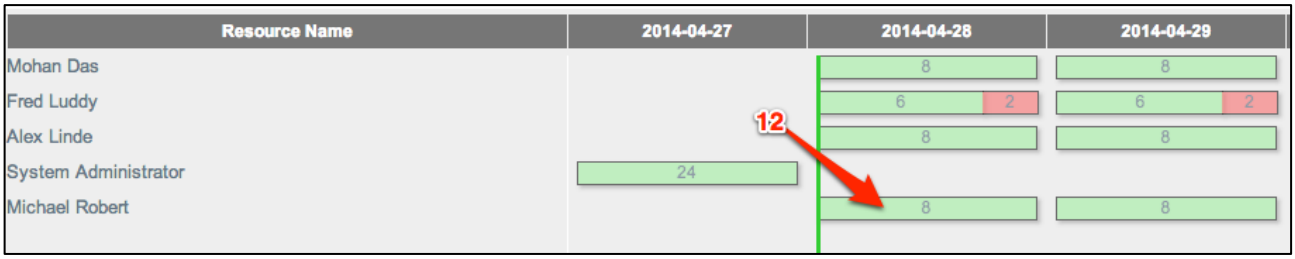


10. Observe that the Resource Manager can now see why Fred is unavailable for 2 hours during that day and further can see the types of Events Fred is already allocated to. He's slotted for 2 hours of Service Desk work in the morning (which we configured earlier), so he can't be allocated to work on this Project for that time.



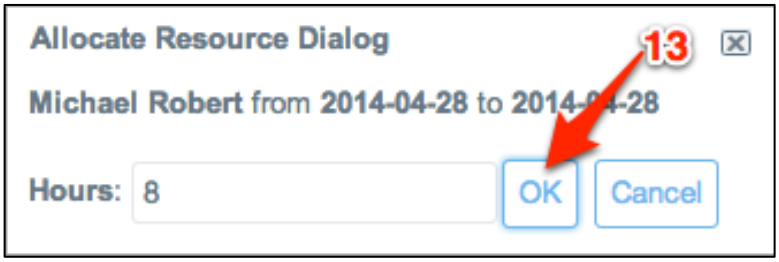
11. Close out Fred's calendar when you are finished viewing it.

12. Let's start allocating the resources for this task. Click on the Green sections of 8 for Michael Roberts (since he's the one who submitted the project) for 2014-04-28.



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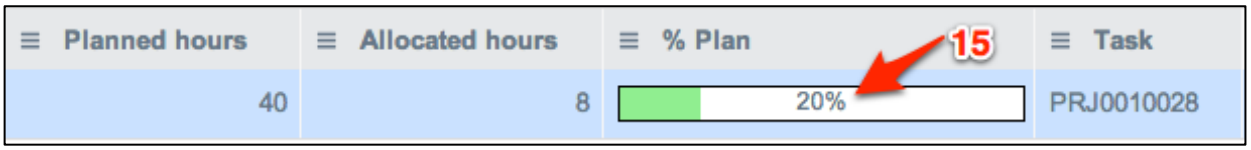
13. The Resource Console will automatically fill in the maximum numbers you can schedule that individual that day for you. Click **OK** on the dialog box.



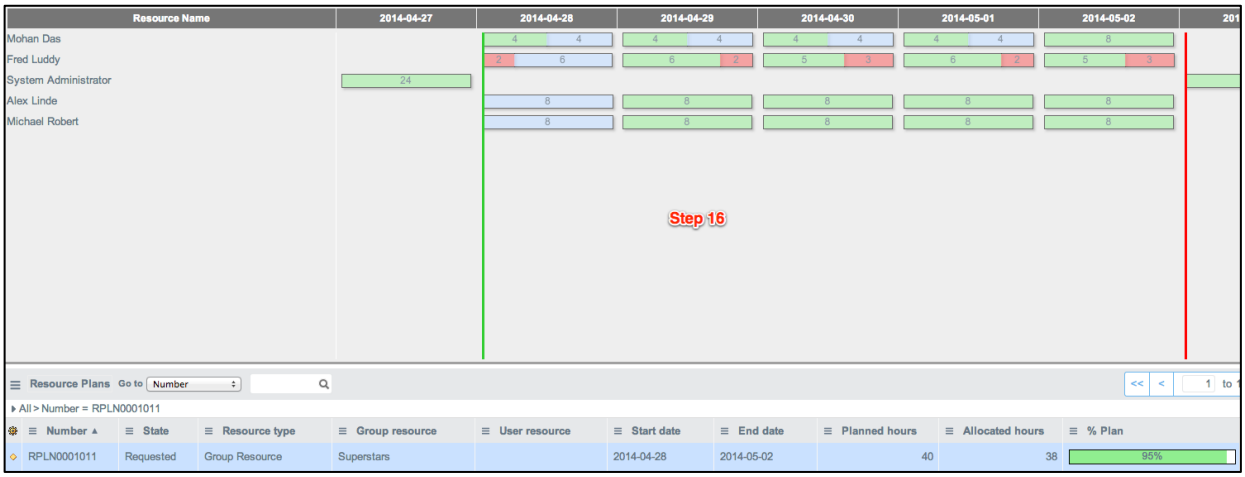
14. Notice what happens to that 8 hour day for Michael. It turned blue in the Console. Challenge: Why is it not Red?



15. Also notice what happened to the percent allocation of plan tracker down at the bottom of the Console. It automatically calculated the % of plan we're currently at after that first 8 hour allocation.

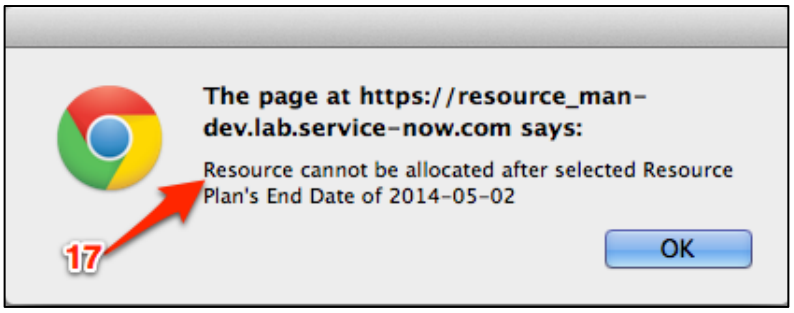


16. Repeat the allocation process for 6 hours of Fred's time on Monday, 8 Hours of Alex's on Monday and 4 hours of Mohan's Monday through Thursday. When you're done, the Resource Console should look like this and it should display 95% utilization of the plan.



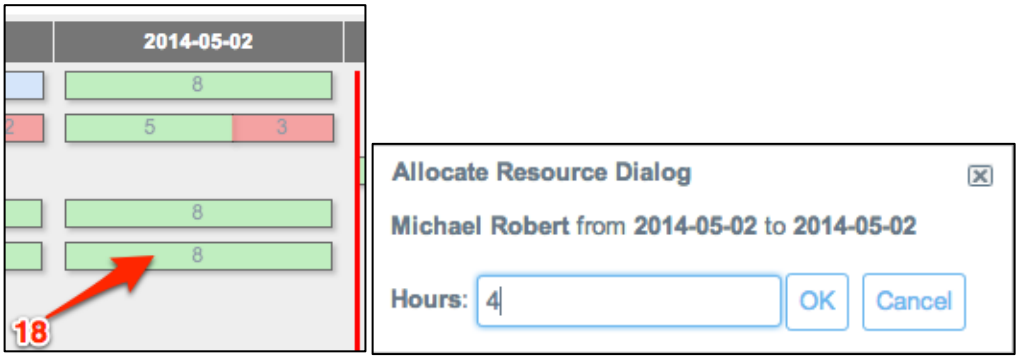
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17. Now try to schedule the System Administrator on the Saturday of 2014-05-03. What happens? You should receive a dialog box similar to this.

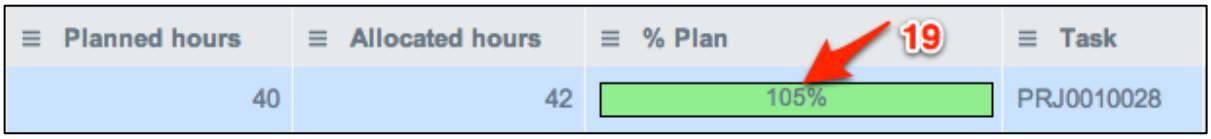


*Note: By default, the system won't allow you to allocate a resource outside of the plan's start and end date. This can be adjusted in the **Resource Management -> Properties** section.

18. What happens if we want to account for a few extra hours as part of the plan? Let's try it! Allocate Michael Robert for 4 hours on Friday 2014-05-02.

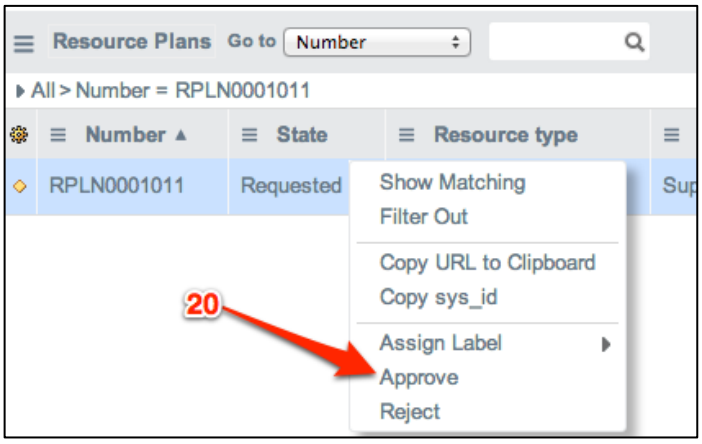


19. It works! The Resource application allows you to over allocate a Resource Plan. It will not however allow you to over allocate an individual user if his or her schedule is maxed out for that day/week/month.



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20. Right click on the Resource Plan state at the bottom of the Console and click **Approve**.



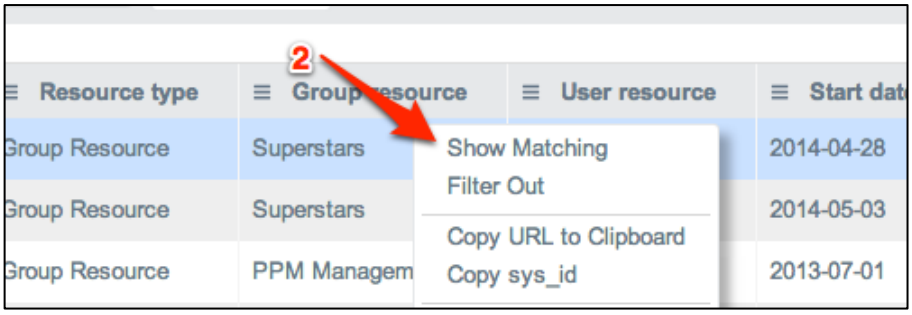
21. We're all set for this plan. Close out the Window or tab and return to the main ServiceNow window.

Getting to know the Resource Console with Change

1. For the Resource Plan created for our change, let's work it from the global Resource Console. Go to the Resource Management application and click **Resource Console.**

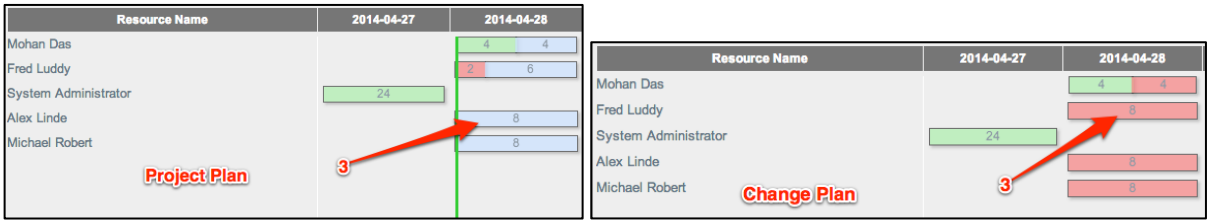


2. Now we can view all the Plans and Resources from a single pain of glass. Right click on the group resource of Superstars and click **Show Matching**. We still have filtering capability in this view.



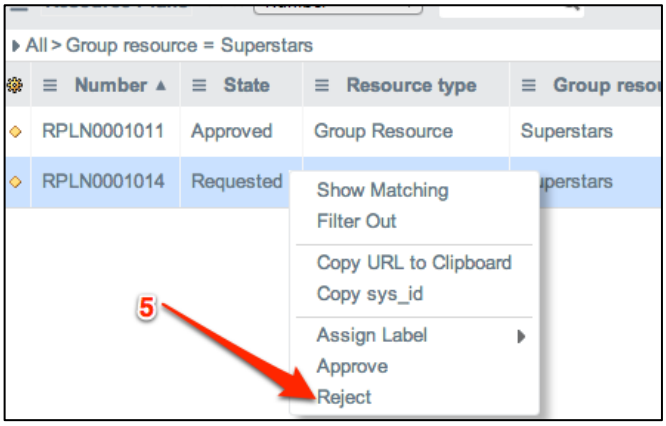
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3. After filtering we can see the two plans that the Superstars team is assigned. If you click between them, do you notice a difference in the displayed user resource calendars?

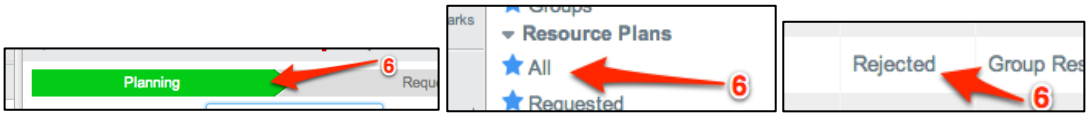


4. Besides the fact that the start and end dates differs between the two, the Project Plan contains some blue portions of the Users' schedules. This explains our challenge question from earlier. Resource time allocated to the current plan you are working on is displayed in blue. If you are working in a different plan but accessing those same users, it will appear in red.

5. Right click on the State of the change Resource Plan and hit Reject.

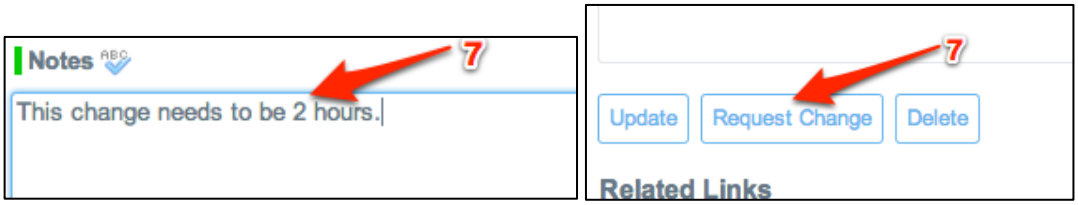


6. Notice that this bounces you back to the Resource plan record and sets the process flow back to Planning. The state will show up as Rejected in the list view (click **Resource Plans -> All**) but this allows the user who initially submitted the plan to edit the record and request a change.

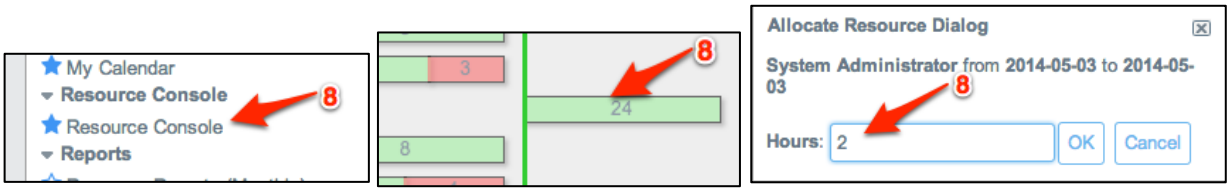


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7. Go back in to the Resource Plan for the change record, type in “This Change needs to be 2 hours” into the notes and hit **Request Change.**



8. Go back to the global Resource Console, right click to do a show matching on the Plans in the state of ‘Change’ (there should only be one) and allocate to the Sys Admin (yourself) on that Saturday.



9. The final result should look like this with the change Resource Plan 100% allocated.



10. Right click on the Change state and **Approve** the plan.

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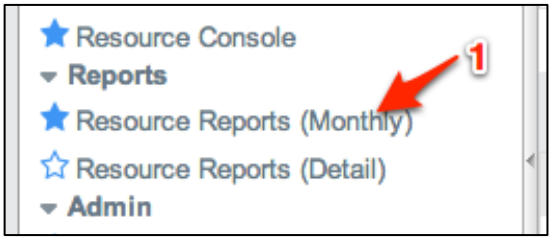
Lab Goal

Last part of resource is to view the outcome of the hours allocated and plans made in the reporting module

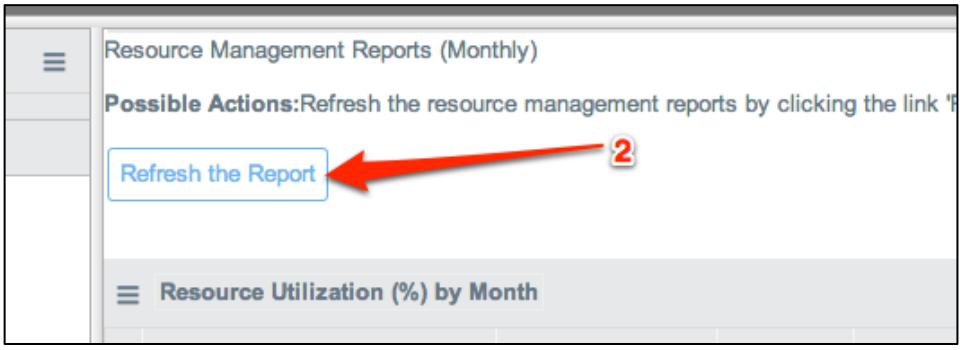
Lab 6
Reporting / Metrics

Report on Resources

1. Click on the **Resource Reports (Monthly)** module in the resource management application.

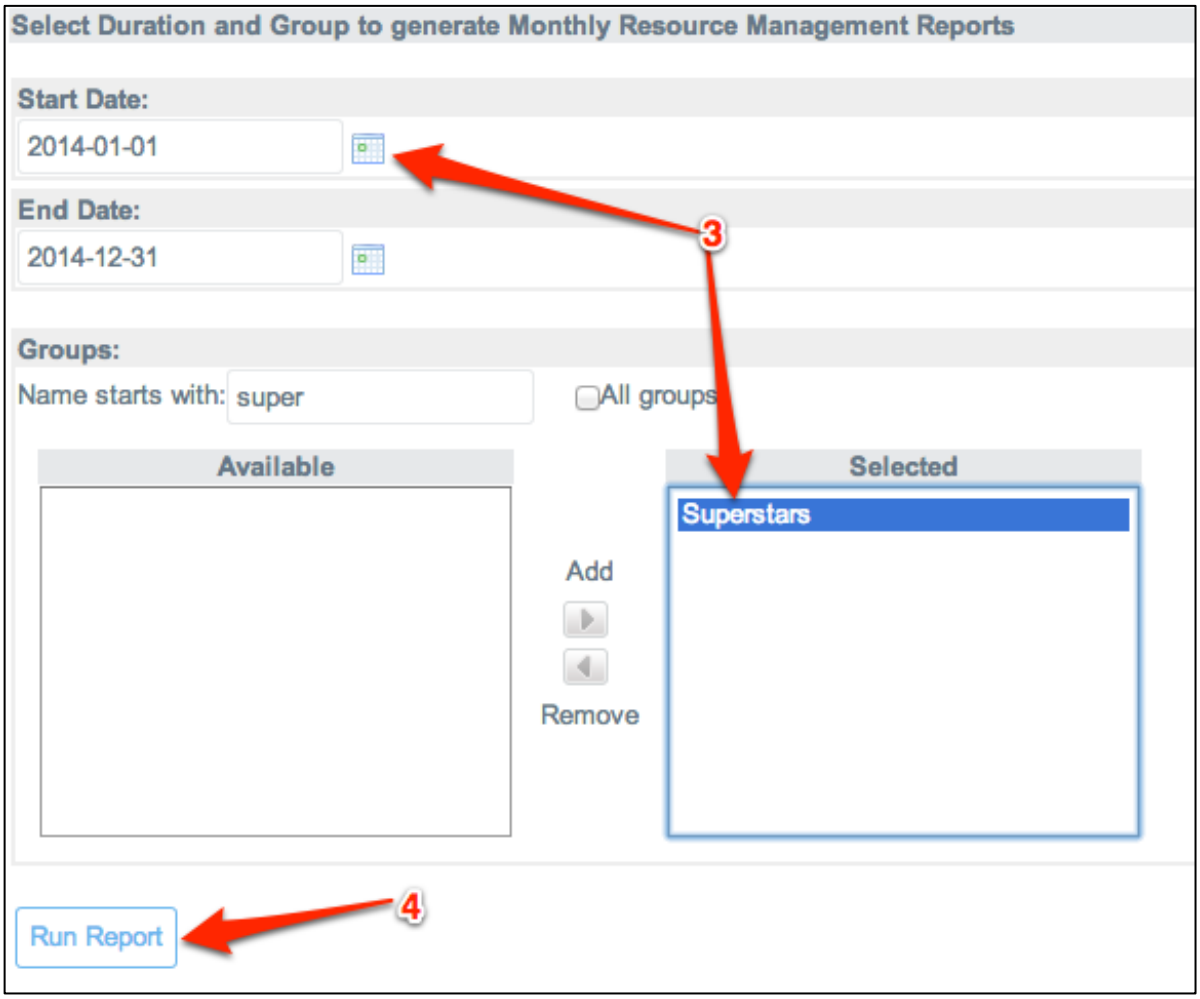


2. This will display a Dashboard with the Resource Utilization (%) by Month, Availability (hrs) by Month, Allocation (hrs) by Month, Capacity by Month (hrs) and Actuals (hrs) by Month. This probably doesn't contain the Superstars group by default so click the **Refresh the Report** button at the top.



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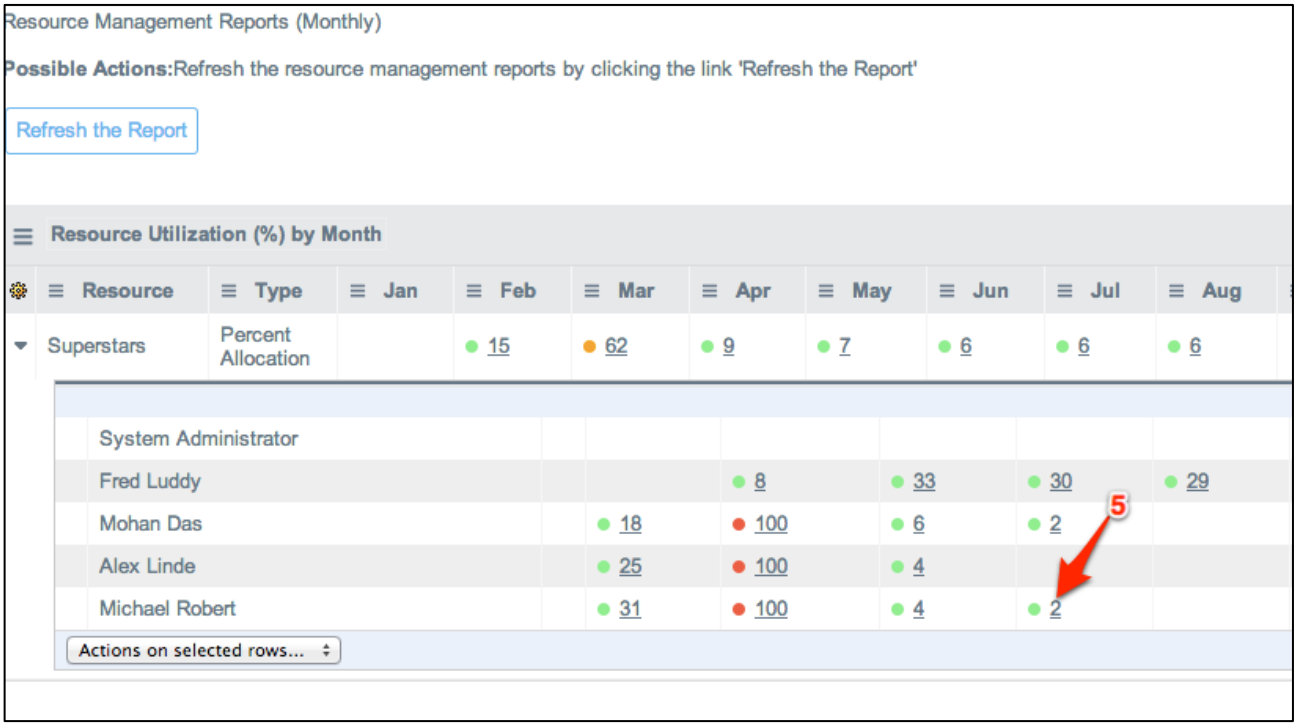
3. Span the dates across calendar year 2014 and add the Group Superstars to the Selected box.

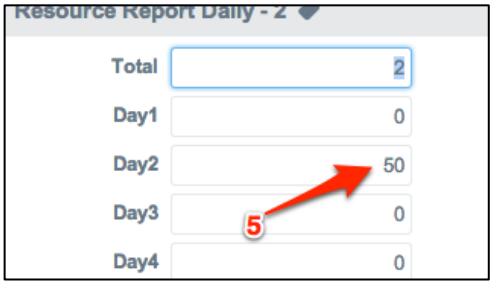


4. Click Run Report and allow the system to capture the metrics for a minute or two. This will save the Resources Reports (Monthly) module to reload the current data with this current selection every time it's clicked. To refresh the numbers, you will have to refresh the Report again (example: if you change a plan allocation or if a User works on a task).

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5. Click on the Michael Roberts's 2% utilization in the month of May to see the 50% (or 4 hours) we scheduled him for on May 2nd.





6. Feel free to explore the other report sections at your own pace, the general principal applies of the rolled-up numbers and the drill down feature into the daily view of that users month.

7. Notice that the System Administrator doesn't have a number filled in for Resource Utilization in the first chart even though we assigned him two hours of the change task to be completed. This is because the reports will only round up to whole numbers and he is currently utilized below 1%.

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8. Challenge – Create a new Resource Plan of 4 hours of work for the System Administrator in the Month of May. Allocate the admin to the Plan and refresh the report to reflect the Admin's Utilization.

9. Your end result should now contain 2% Utilization for the System Administrator in the month of May.



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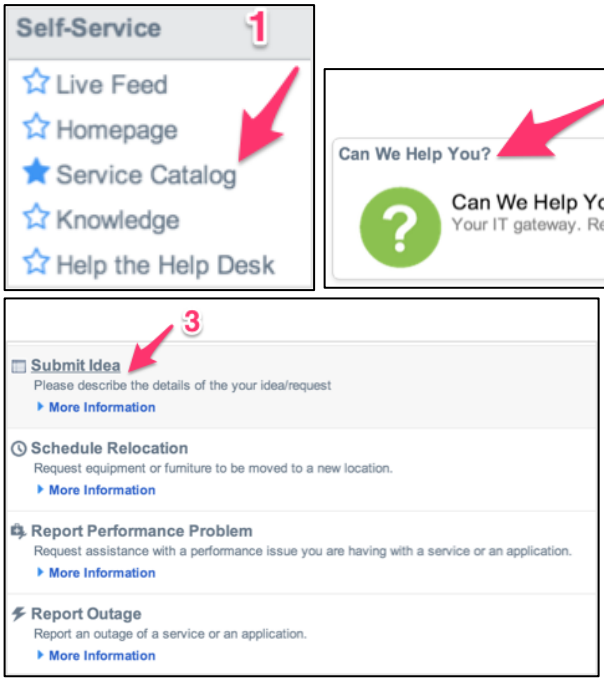
Lab Goal

To kickoff our lab, you will impersonate Michael Robert as he submits an Idea through the Service Catalog.

Lab 7 Submit Idea

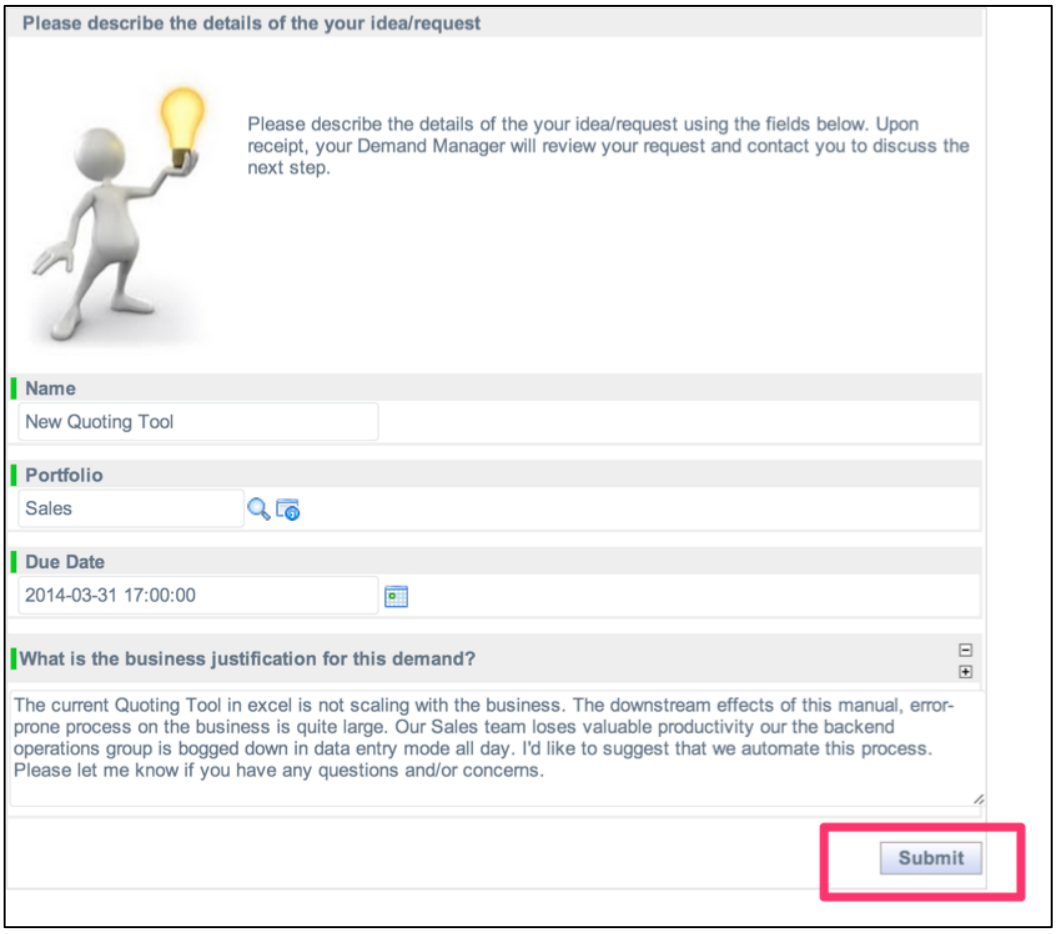
Submit Idea through the Service Catalog

1. Log into your instance and impersonate **Michael Robert**.
2. Navigate to the **Service Catalog** through the **Self-Service application**.
3. Enter the **Can We Help You?** section of the Service Catalog & click **Submit Idea**

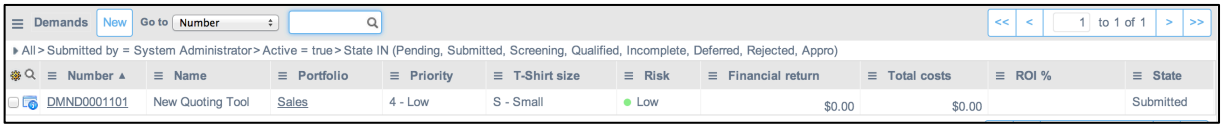


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4. Fill the fields out as follows and click **Submit**.



5. View your in state of your Idea in the **My Demands module.**



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Lab Goal

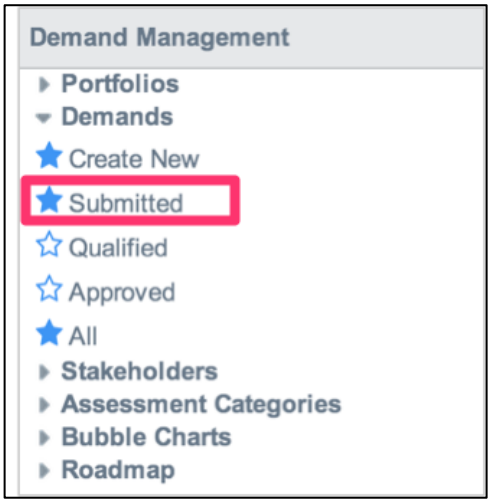
In this portion of the lab, you will impersonate Fred Luddy, a Demand Manager, as he takes the "New Quoting Tool" request through a structured Workflow. Fred will validate that the stakeholder register, gather requirements, record decisions, identify risks, and build out the Business Case.

Lab 8
Demand Screening & Qualification

Categorize Demand, Select Type, Relate Records, & Select CI

1. Log into your instance and impersonate **Fred Luddy**.

2. Navigate to the Submitted module under the Demand section of the Demand Management application and select the **New Quoting Tool** record.



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3. Make the following changes to the **Demand** form.
    a. **Categorize** the Demand as **Strategic**
    b. Select **Project** as the **Type**
    c. Select the **SAP Sales & Distribution** Configuration Item
4. Search the **Knowledge Base** through the icon to the right of the Demand **Name**
5. View applicable **Knowledge Articles** (search 'quoting').
6. Return to the Demand form and click **Save**.





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Add a Stakeholder, Requirement, Identify a Risk, Record a Decision, & View Resource Availability

7. Add Michael Robert to the **Stakeholder Register**.

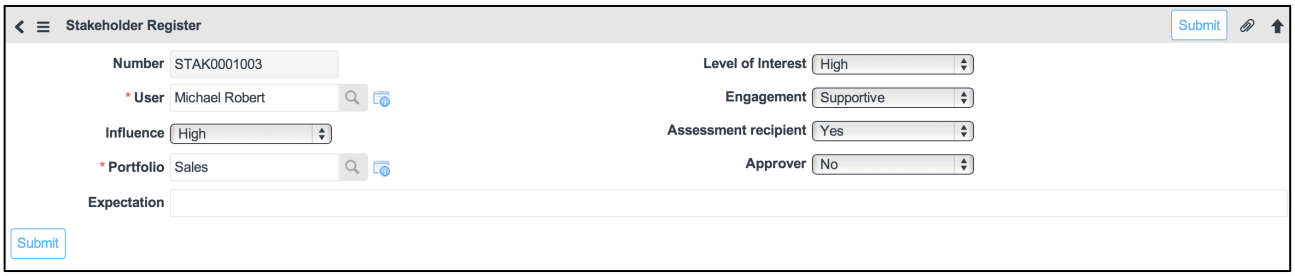
    a. Navigate to the **Stakeholder** related list.

    b. Click **New.**

    c. **Populate the following fields:**

    - User: **Michael Robert**
    - Influence: **High**
    - Portfolio: **Sales**
    - Level of Interest: **High**
    - Engagement: **Supportive**
    - Assessment Receipient: **Yes**
    - Approver: **No**
    - Expectation: **(blank)**

    d. Once completed click **Submit.**



8. Add an additional **Requirement** by navigating to the Requirements related list and select New.

    - Source: **Michael Robert**
    - Owner: **Fred Luddy**
    - Effort: **10 hours**
    - Priority: **2-High**
    - State: **Approved**
    - Type: **Business**

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- Short Description: **Automated configurator**

9. Once completed click **Submit**.



10. **Add an additional** Risk **by navigating to the Risk related list and select** New**.**

- State: **Pending**
- Probability: **Moderate**
- Estimated Cost: **$25,000**
- Actual Cost: **$0.00**
- Short Description: **Budget overrun due to unknown requirements**
- Mitigation Plan: **Hire outside consultants**

11. Once completed click **Submit.**



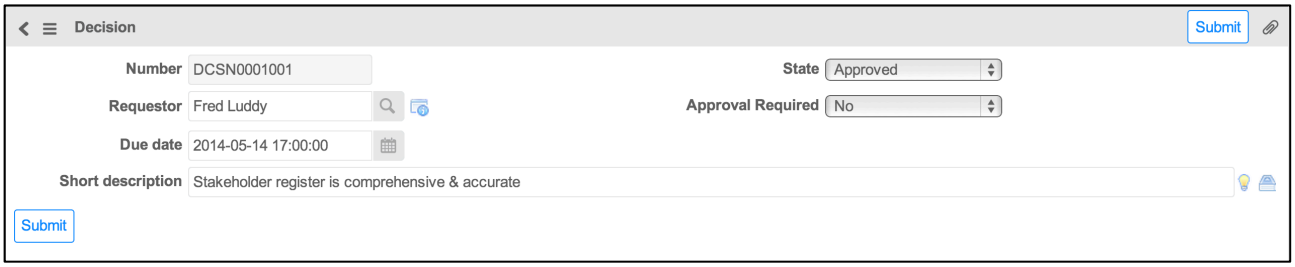
12. Record a **Decision** by navigating to the Decision related list and select **New.**

- Requestor: **Fred Luddy**
- Due Date: **2014-05-14 17:00:00**

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- State: **Approved**
- Approval Required: **No**
- Short Description: **Stakeholder register is comprehensive & accurate**

13. Once completed click **Submit.**



14. Add an additional **Resource Plan** by navigating to the Resource Plan related list and select **New**.

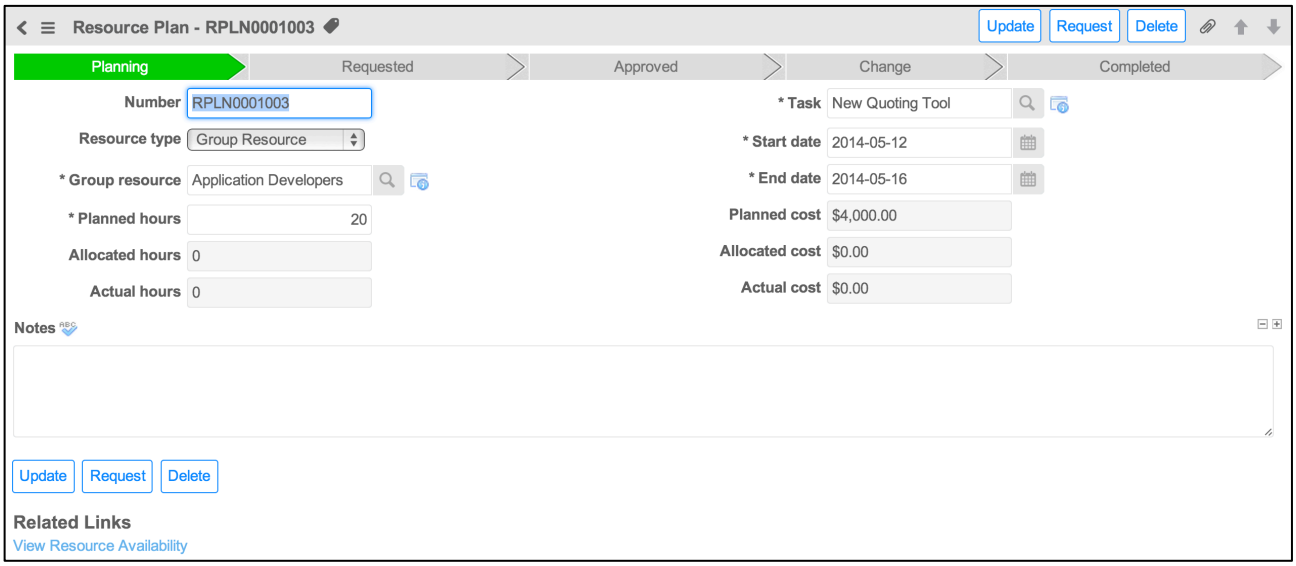
- Resource Type: **Group Resource**
- Group Resource: **Application Developers**
- Planned Hours: 20
- State Date: 2014-05-12
- End Date: 2014-05-16

15. Once completed, right click on the header bar and click **Save**.

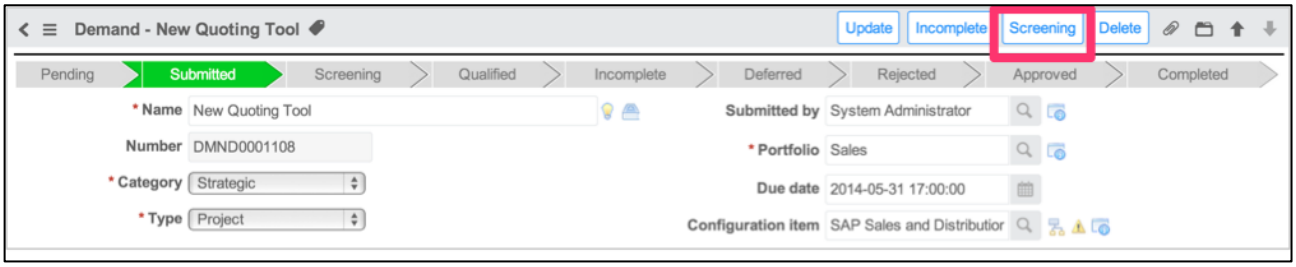
16. View Resource Availability by clicking the **View Resource Availability** link.

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17. Once completed go BACK to **Demand.**



18. Send the Demand into the next stage by selecting **Screening** above the Demand form.



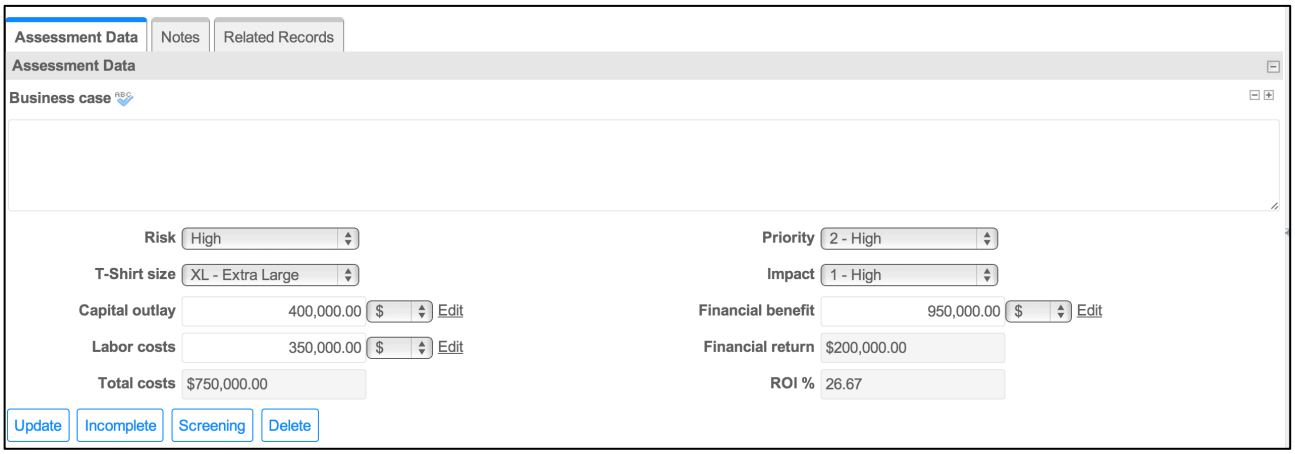
Build the Business Case

19. Navigate to the **Assessment Data** section of the form to build out the Business Case.

- Risk: **High**
- T-shirt Size: **XL-Extra Large**
- Priority: **2-High**
- Impact: **1-High**
- Capital Outlay: **$400,000**
- **Labor Cost**: **$350,000**
- **Financial Benefit**: **$950,000**

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20. Once completed right-click the header bar and click **Save**.

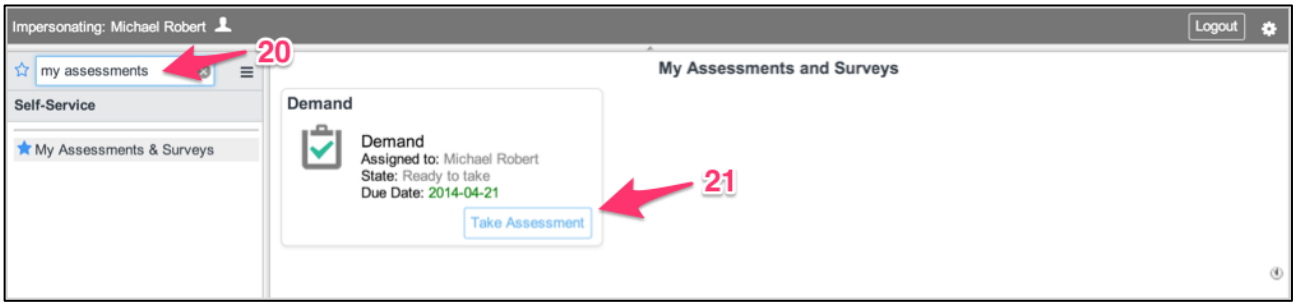


Take Assessment Survey

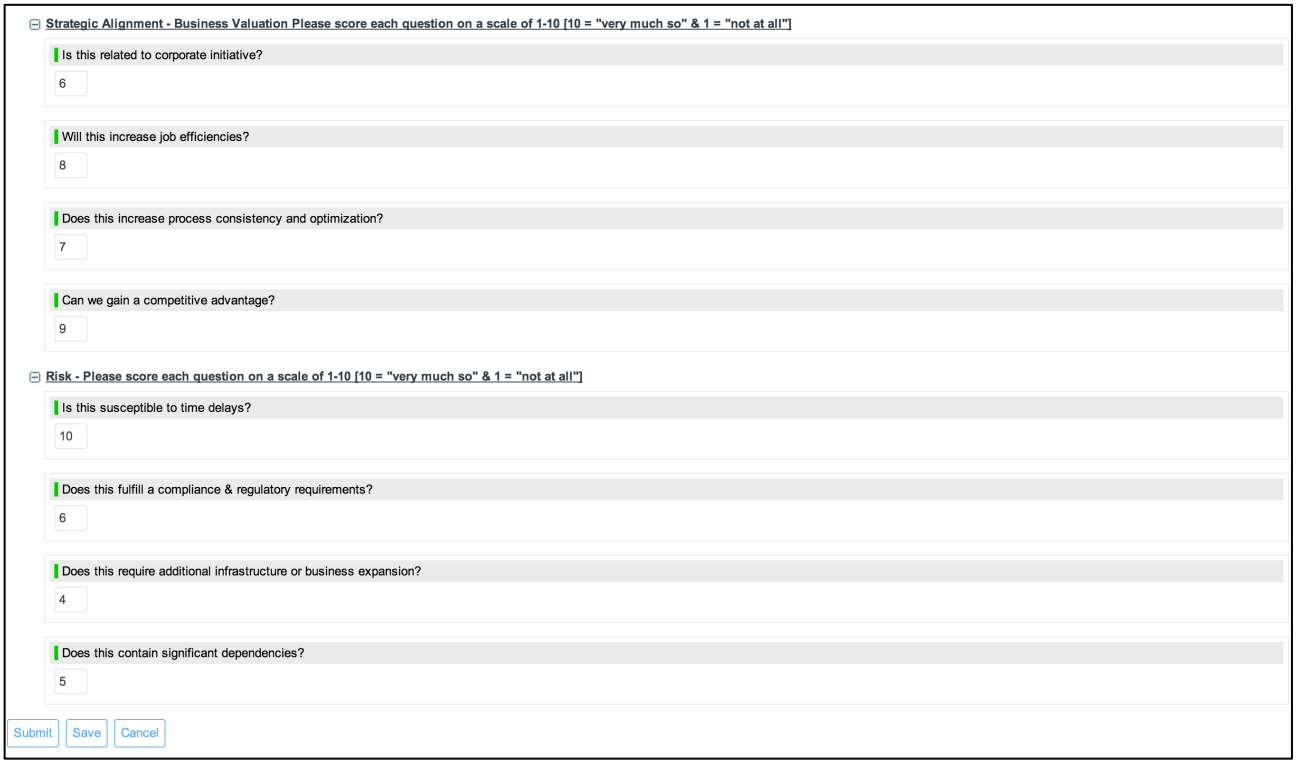
21. Impersonate **Michael Robert**.

22. Navigate to **My Assessments & Surveys** within the **Self-Service** application.

23. Click **Take Assessment**.



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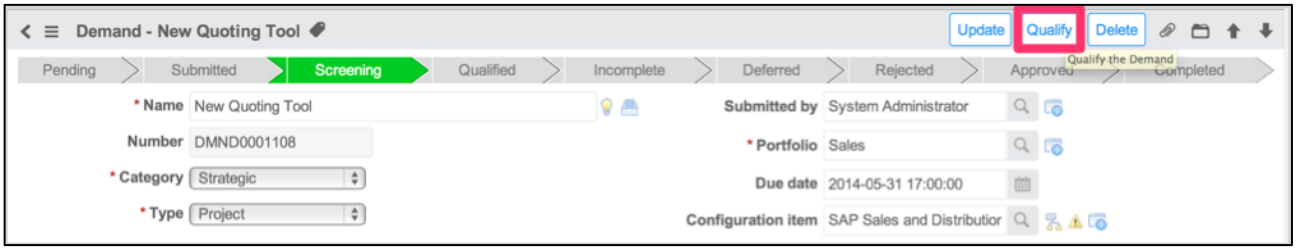


24. Once completed click **Submit**.

25. Log back in as **Fred Luddy**.

26. Navigate back to the **New Quoting Tool** Demand by selecting All under the **Demands** grouping within the **Demand Management** application.

27. Score the Demand by clicking the **Qualify** button above the Demand Form to score the Demand.



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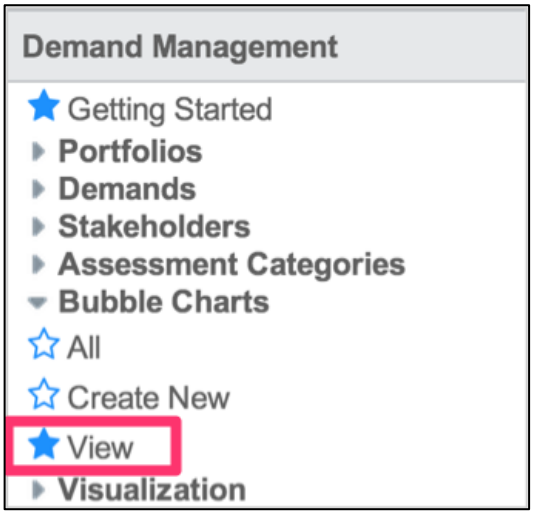
Lab Goal

In this portion of the lab, you will transition the Qualified "New Quoting Tool" demand into the approved state. You will start by comparing this Demand to all other inside of a Bubble Chart. The approved Demand will auto-generate a Project.

Lab 9 Demand Backlog & Approval

Approve Demand through the Bubble Chart

1. Remain logged on as Fred Luddy.
2. View scorecard by navigating to **View** within the **Bubble Chart** grouping inside of the Demand Management application.



3. **Filter** the list view beneath the Bubble Chart by only viewing Demand that are in the **Qualified** State.

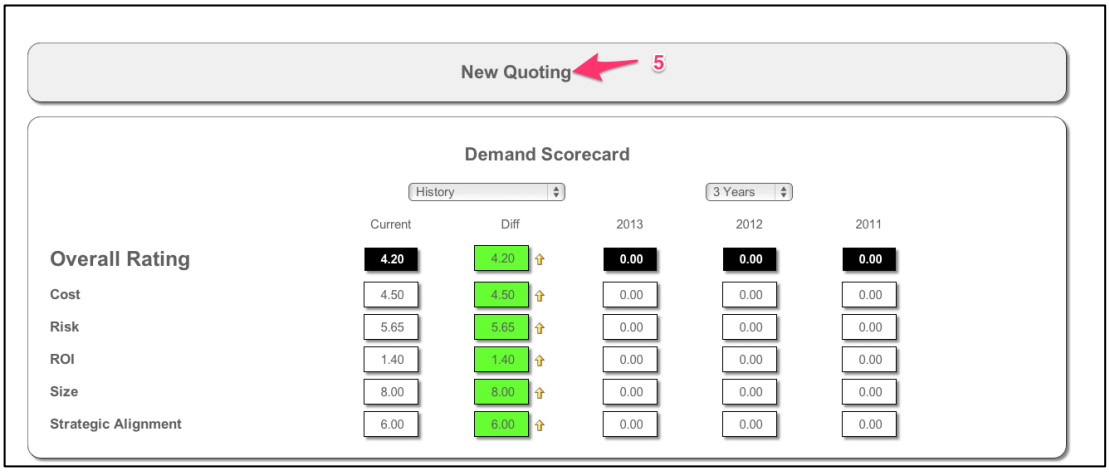
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4. Click on the **New Quoting Tool** Demand within the Bubble Chart.



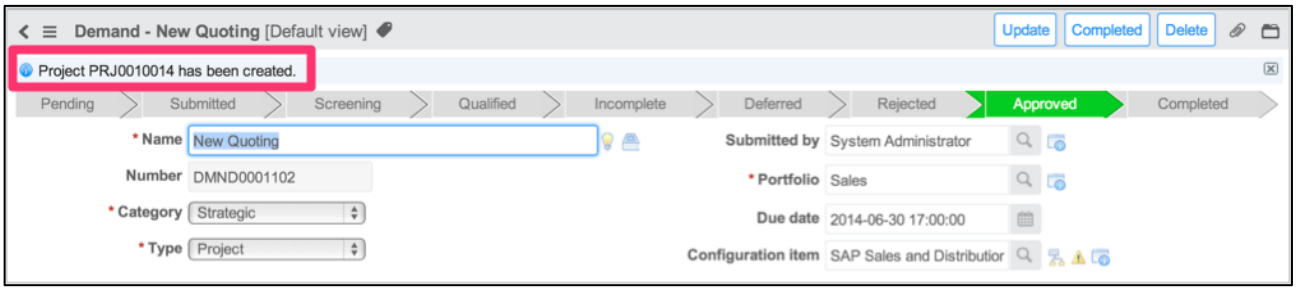
Note: Bubble may be in a different location.

5. Click the **New Quoting Tool** link on top of the Scorecard to navigate to the Demand record.



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6. Click the **Approve** button on top of the Demand form (project automatically created).



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