Resource Management in ServiceNow

Quick Reference Guide

Overview of Resource Management

Resource Management

- Efficient and effective deployment and allocation of an organization's resources when and where they are needed.

Roles

- **Resource Requestor** (Demand Manager/Project Manager) – Requests Groups/Resources by creating resource plans.

- **Resource Manager** – Analyzes the impact of Resource Plans on resource utilization and availability. From that, commits resources to work.

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Typical Resource Planning Process
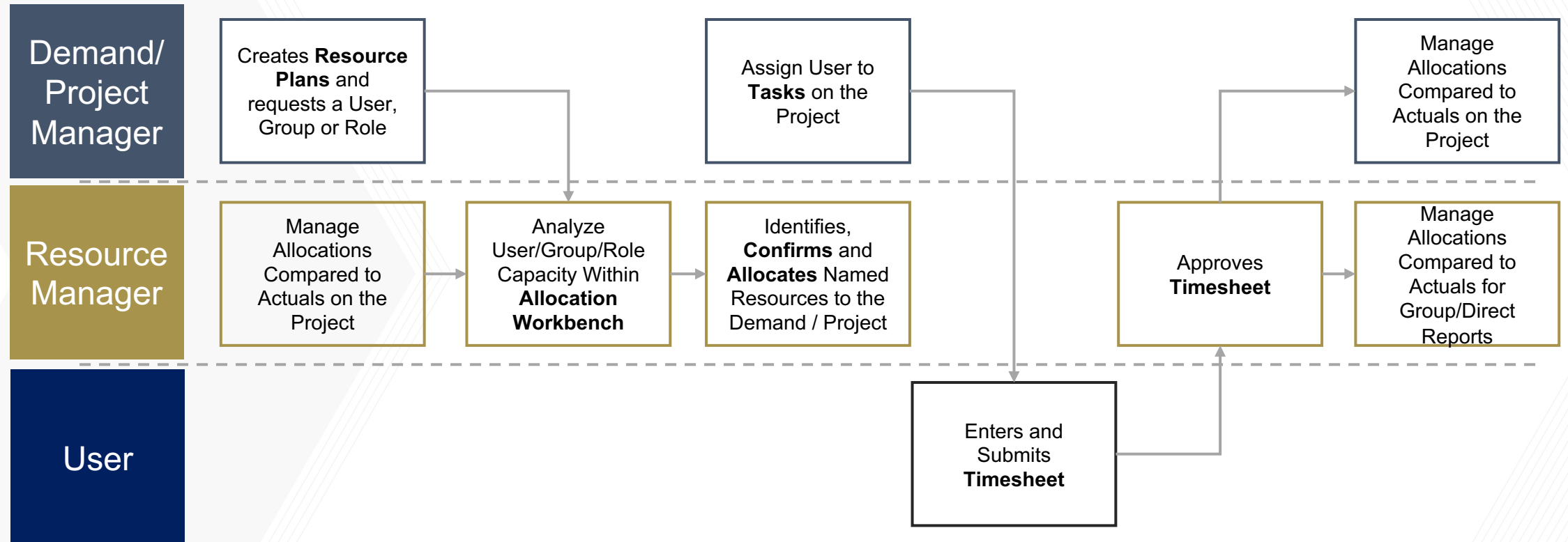
Typical Resource Planning Steps

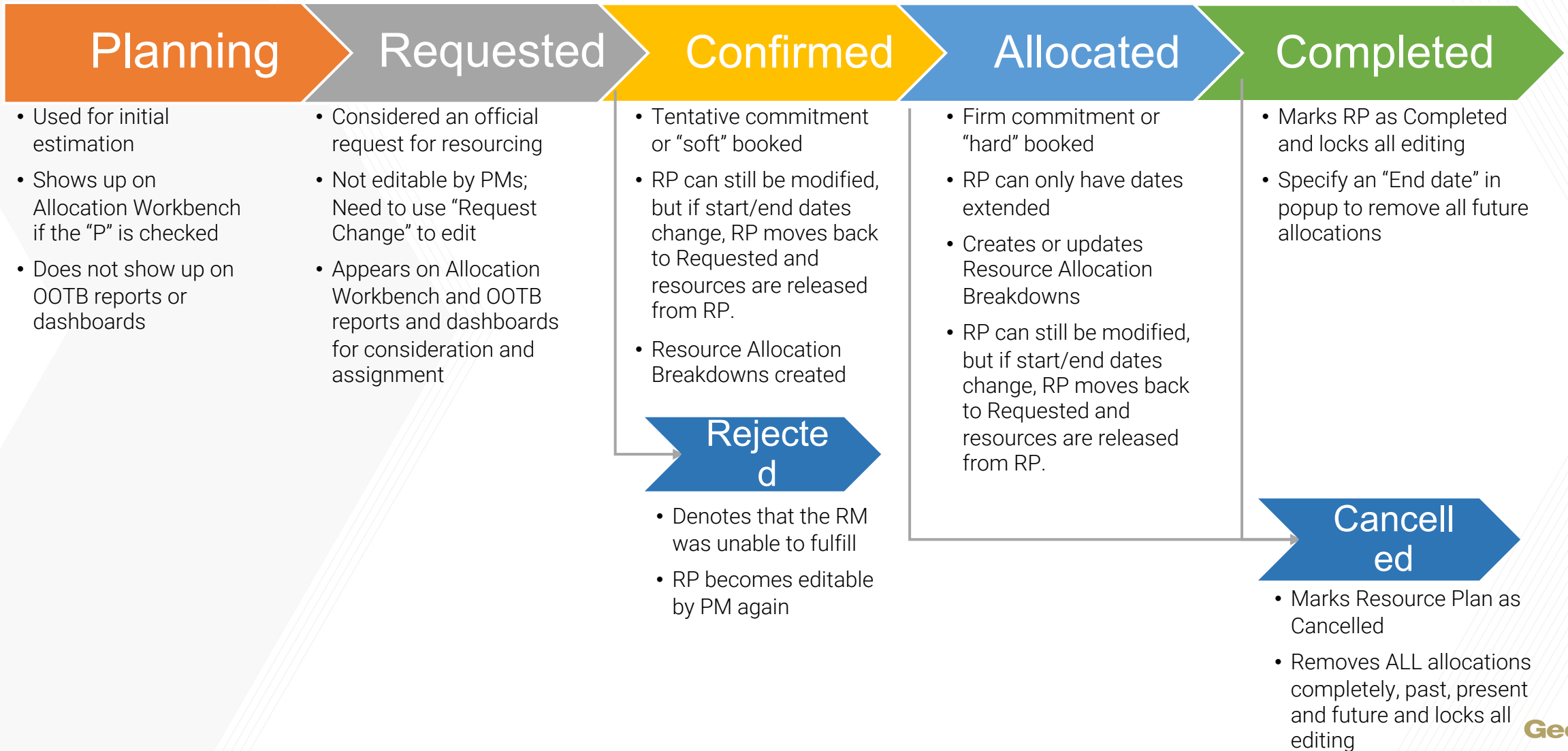1. The Demand/ Project Manager requests resources by creating Resource Plans that ask for a specific group, user, or role to perform required tasks.

2. Once the Demand/ Project Manager is ready to request the resource, they change the State of the Resource Plans from Planning to Requested. Depending on the process, this can occur on a Demand or a Project.

3. Resource Managers review requests made of their team within the Allocation Workbench, and using the Resource Finder, determine who will be allocated to the Demand/ Project.

4. Using the Resource Finder, Resource Managers identify the appropriate skill set for the request, review existing allocations and utilization of their team, and Confirm specific users to Projects and Demands. This creates a **soft booking**.

5. As the project moves closer to the actual start date, the Resource Manager can Allocate resources to work within the Allocation Workbench. There should be a high level of confidence in the specific resource, the hours, and the dates. This creates a **hard booking**.

Note: If a Demand is Approved and converted to a Project, Resource Plans from the Demand will move to the Project

Resource Plan Workflow within ServiceNow

Planning	Requested	Confirmed	Allocated	Completed

Planning
- Used for initial estimation
- Shows up on Allocation Workbench if the "P" is checked
- Does not show up on OOTB reports or dashboards

Requested
- Considered an official request for resourcing
- Not editable by PMs; Need to use "Request Change" to edit
- Appears on Allocation Workbench and OOTB reports and dashboards for consideration and assignment

Confirmed
- Tentative commitment or "soft" booked
- RP can still be modified, but if start/end dates change, RP moves back to Requested and resources are released from RP.
- Resource Allocation Breakdowns created

Rejected
- Denotes that the RM was unable to fulfill
- RP becomes editable by PM again

Allocated
- Firm commitment or "hard" booked
- RP can only have dates extended
- Creates or updates Resource Allocation Breakdowns
- RP can still be modified, but if start/end dates change, RP moves back to Requested and resources are released from RP.

Completed
- Marks RP as Completed and locks all editing
- Specify an "End date" in popup to remove all future allocations

Cancelled
- Marks Resource Plan as Cancelled
- Removes ALL allocations completely, past, present and future and locks all editing

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Resource Plan State Details

	Planning	Requested	Confirmed	Allocated	Completed	Rejected	Cancelled
PurposeResource Plan State Details	Initial Planning & Estimation	Formally Request a Resource	Tentatively Commit a Resource (Soft Book)	Commit a Resource (Hard Book)	Resource Commitment is Complete	Denote that the RM was Unable to Fulfill the Request	To denote a RP that has been cancelled
PM Rights	Editable	Read-Only; Can Use "Request Change" to move back to Planning to Edit	Read-Only	Read-Only	Read-Only	Editable	Read-Only
RM Rights	Editable	Editable	Editable	Read-Only; Can Use "Extend RP" to Change End Date	Read-Only	Editable	Read-Only
Next Steps (configurable)	Request, Cancel, or Delete	RM: Confirm, Allocate, Reject, Cancel, or Delete PM: Request Change, Cancel or Delete	Allocate, Cancel, and manually contour Resource Allocation hours	Cancel, Complete, Extend Resource Plan, and manually contour Resource Allocation hours (if no actuals)	None	Request or Delete	None
Reporting Views	Allocation Wkbnch	Allocation Wkbnch, Capacity Planning, Resource Reports	Allocation Wkbnch, Resource Reports, Reports - New	Allocation Wkbnch, Resource Reports, Reports - New	Allocation Wkbnch, Resource Reports, Reports - New	Custom View / Run Report	Custom View / Run Report
Allocation Breakdown Type	Requested Only	Requested Only	Requested & Resource	Requested & Resource	Requested & Resource	Requested Only	All Allocations Removed
Impacts Resource or Group Availability	No	No	Yes	Yes	Yes	No	All Allocations Removed