

The background of the slide is a photograph of a tunnel, likely the Georgia Tech tunnel, with a large 'GT' logo visible in the upper left. The image is overlaid with a semi-transparent olive green filter. On the left side, there is a white arrow pointing right, which contains the Georgia Tech logo and the text 'CREATING THE NEXT'.

**Georgia
Tech**



CREATING THE NEXT

Creating a Resource Plan and Requesting Resources

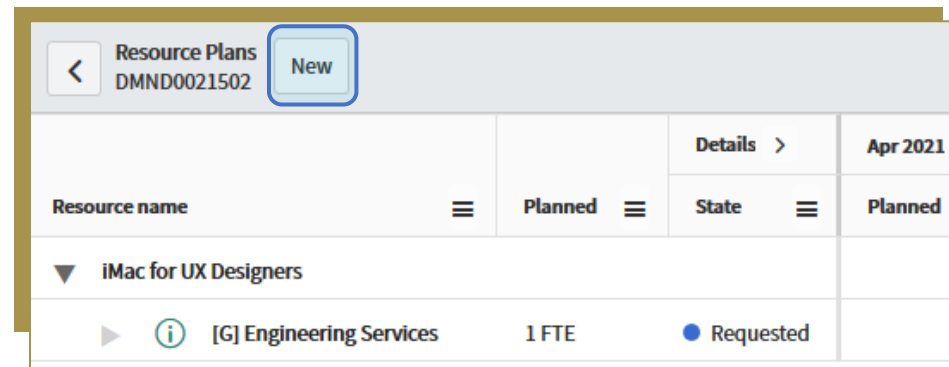
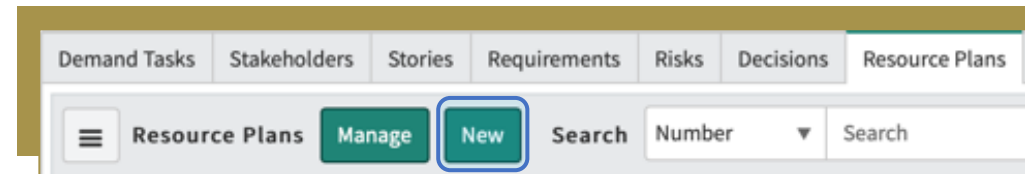
Quick Reference Guide

Creating a Resource Plan

Resource Plans are a key element in resource management. Resource requesters such as project managers or demand managers create resource plans to ask for resources. Resource managers receive those requests and confirm and/or allocate resources to those resource plans. From there, project managers can track allocated hours and costs vs. actual hours and costs.

Resource Plans on Demands:

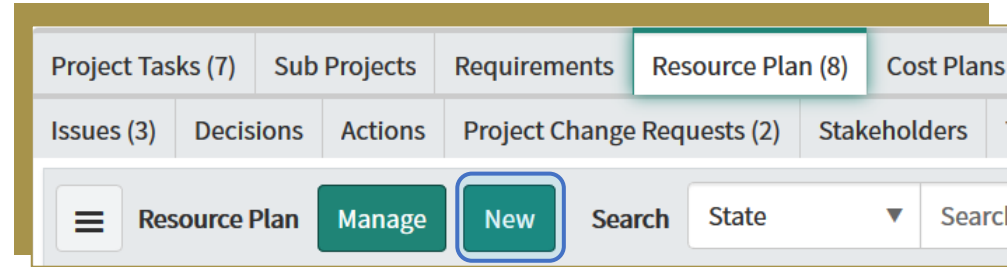
- On the **Demand** form, create a Resource Plan via the Resource Plan related list by clicking **New**.
- Alternatively, click **Manage**, and on the Resource Plans view, click **New**.



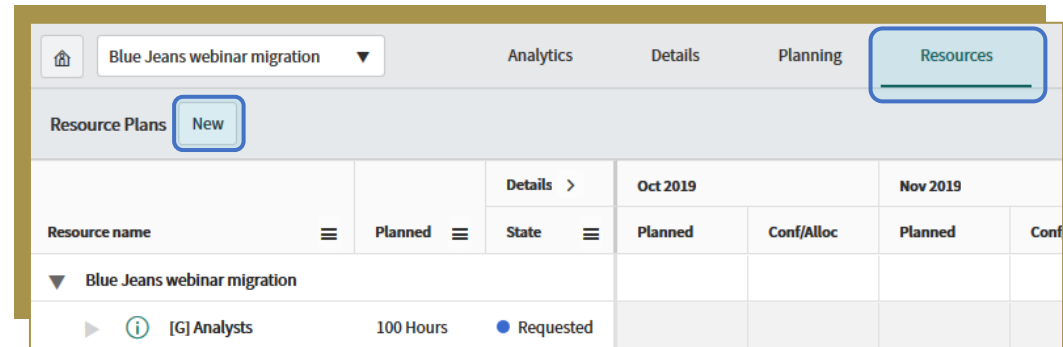
Creating a Resource Plan

Resource Plans on Projects:

On the **Project** form, create a Resource Plan via the Resource Plan related list by clicking **New**.



Alternatively, click on the **Resources** tab of the Project Workspace view, and click **New**.



Creating a Resource Plan

Resource Plan Key Fields:

- 1. Resource Type** – Group, User or Role. Based on selection you are presented with additional fields to complete (Group, Role, Member List, Skills).
- 2. Request Type** – Hours, FTE, Person Days. Enter # of hours, FTE or Person Days.
- 3. Allocation Type** – Weekly, Monthly, Planned Duration.
- 4. Allocation Spread** – Front Load or Even (spread allocation evenly across periods).
- 5. State** – Read only field of where the resource plan is in the process.
- 6. Rate Override:** By default, ServiceNow will use the Rate Model that was setup for the user, group, or role on the resource plan. These rates are used to **automatically generate a Cost Plan** every time a resource plan is created, and determine planned, confirmed, and allocated costs on the resource plan. To override the rate in the Rate Model, click the checkbox and enter a new rate which is applied only for this specific resource plan.

The screenshot shows the ServiceNow interface for creating a Resource Plan. The title bar reads "Resource Plan RPLN0001009" and includes action buttons: Save, Update, Cancel, Request, and Delete. The form fields are as follows:

- Name: Development API
- Number: RPLN0001009
- * Start date: 2019-12-30
- * End date: 2020-03-11
- Rate override:
- * Resource rate: \$ 90.00
- * Task: PRJ0010212
- State: Planning
- Resource type: User
- Group: Reporting & Analytics
- * User: Reginald Humes

At the bottom, there are tabs for "Resource Details", "Request Details", "Allocation Config", and "Notes". Below the tabs are additional action buttons: Save, Update, Cancel, Request, and Delete.

Creating a Resource Plan

When all fields have been filled out, click **Request** to formally request the resources. This will put the resource plan in **Requested** state.

Clicking **Save** or **Update** will leave the resource plan in **Planning** state.

The screenshot shows a web application interface for creating a resource plan. The form is titled "Resource Plan RPLN0001009". It contains the following fields and controls:

- Name:** Development API
- Number:** RPLN0001009
- * Start date:** 2019-12-30
- * End date:** 2020-03-11
- Rate override:**
- * Resource rate:** \$ 90.00
- * Task:** PRJ0010212
- State:** Planning
- Resource type:** User
- Group:** Reporting & Analytics
- * User:** Reginald Humes

The form has a tabbed interface with "Resource Details" selected. At the top right, there are buttons for "Save", "Update", "Cancel", "Request", and "Delete". The "Request" button is highlighted in blue. At the bottom, there are buttons for "Save", "Update", "Cancel", "Request", and "Delete".