Creating a Resource Plan and Requesting Resources

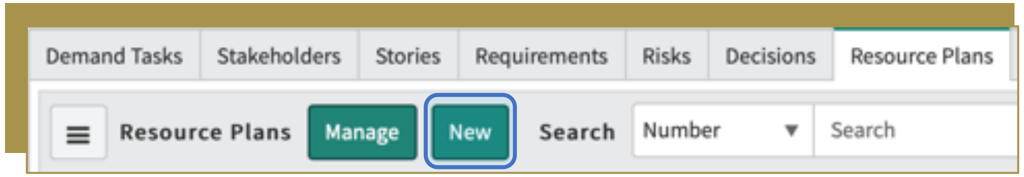
Quick Reference Guide

Creating a Resource Plan

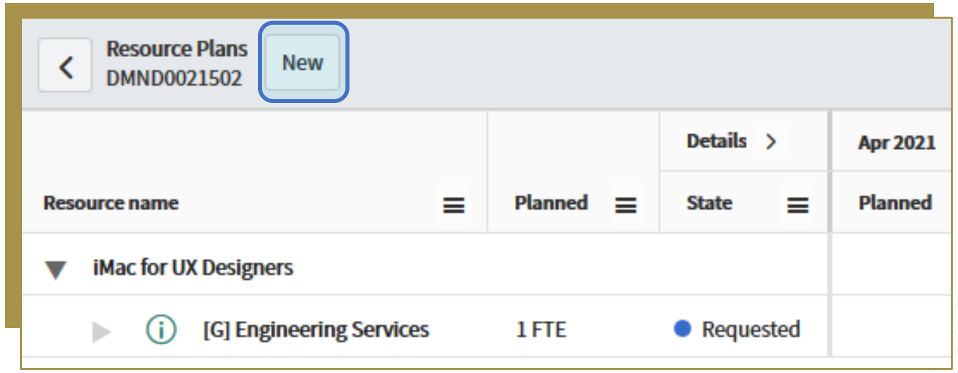
Resource Plans are a key element in resource management. Resource requesters such as project managers or demand managers create resource plans to ask for resources. Resource managers receive those requests and confirm and/or allocate resources to those resource plans. From there, project managers can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



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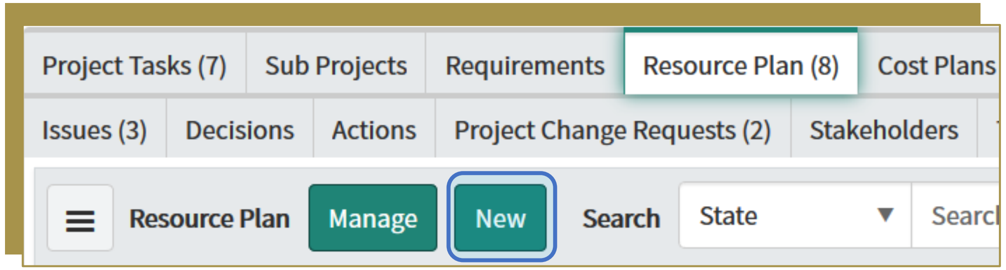
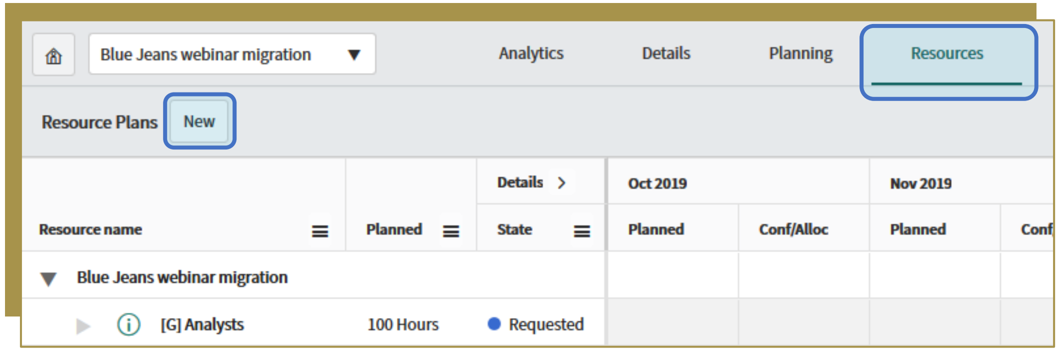
Resource Plans on Projects:

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**.



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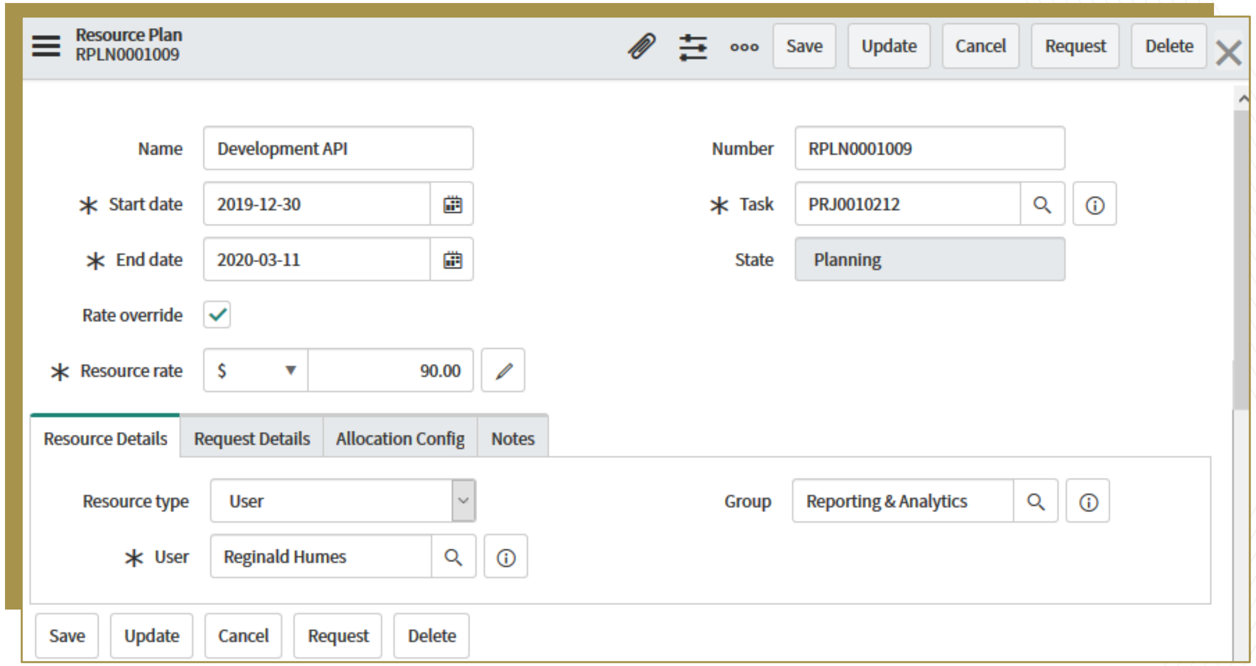
Resource Plan Key Fields:

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 <u>which is applied only for this specific resource plan</u>.



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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.