



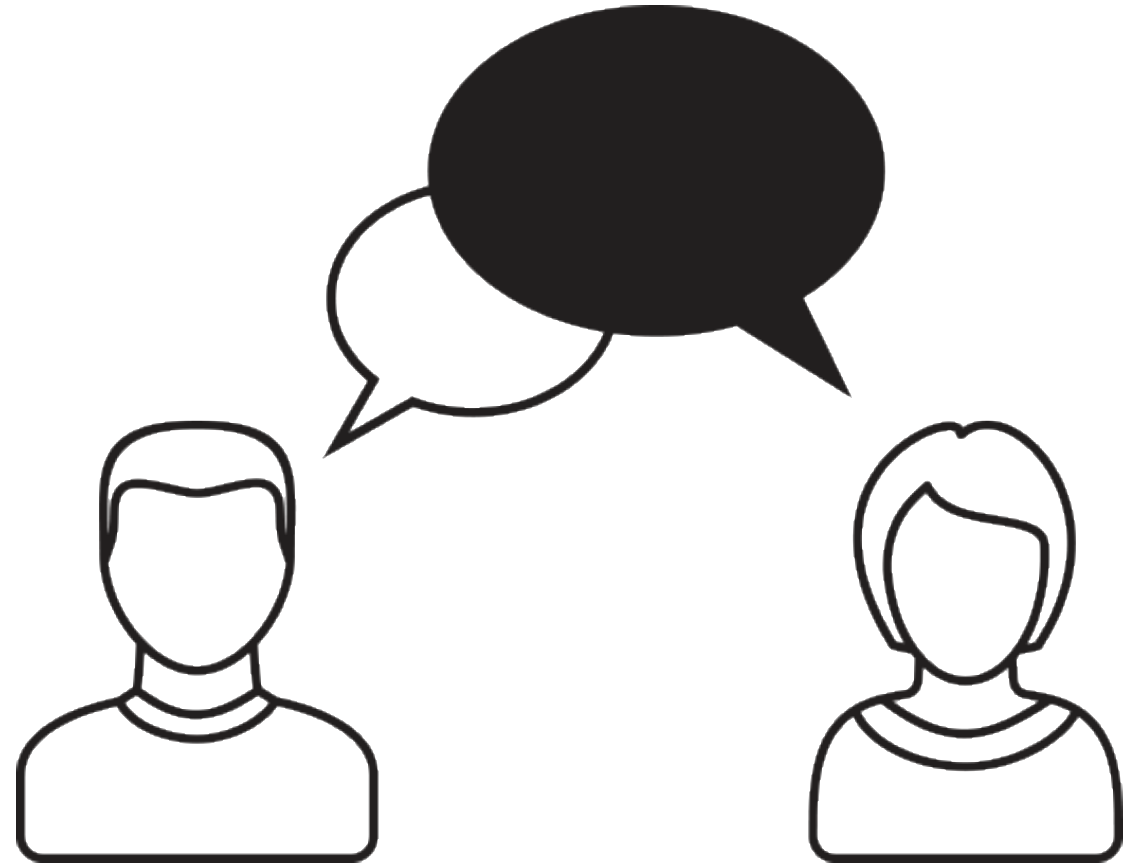
regoUniversity 2019

SAN DIEGO

Resource Manager |
Best Practice “Day in the Life”
Your Guides: Grant Zemont and Michael Meyers

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



Agenda

- Open Discussion #1
- Resource Management Process
- Weekly Checklist for Resource Managers
- Open Discussion #2
- Best Practices/Tips and Tricks
- Open Discussion #3
- OOTB Resource Reports

What is Resource Management?

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

What is the Problem are we Trying to Solve?

1. We don't know who is working on what at an enterprise level.
2. I keep hearing we don't have enough people to do all the work – is this true? How would I know?
3. Resource planning and forecasting is ad hoc, via spreadsheets, via multiple systems, difficult to get a clear picture beyond the next few weeks.
4. I don't have visibility into resource issues ahead of time, only when conflicts arise NOW.
5. We always seem to be in fire-fighting mode when it comes to who's working on what.



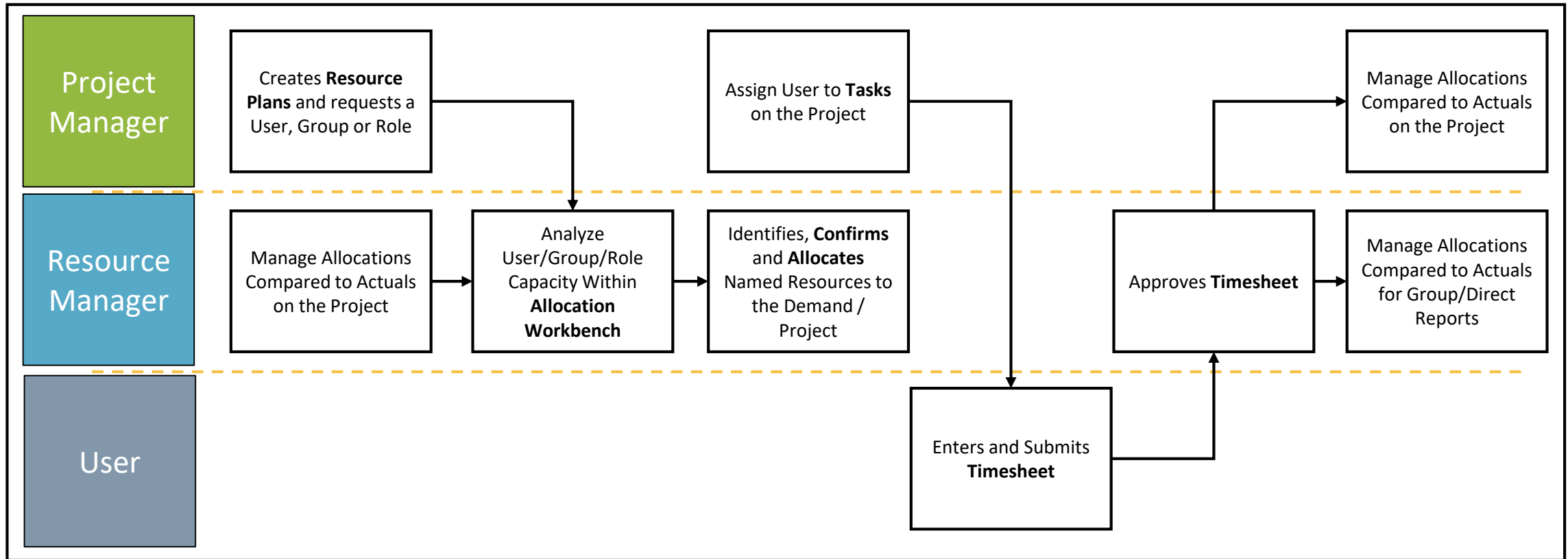
Open Discussion #1

- What is your weekly resource management routine?
- What steps in the process seem “broken”?



“Best Practices” Resource Management Process

7



Weekly Checklist for Resource Managers

Weekly Task	Why?
Review and approve timesheets	To ensure accuracy and compliance
Review “Requested” Resource Plans for your team/department	Replace requested Resources/roles with named resources
Review “Resource Reports” for your Resources to ensure appropriate utilization	To ensure resource is appropriately utilized Inaccurate forecast can impact organizational staffing
Review resource allocations at the project level on the Resource Workbench for accuracy	To ensure resource forecast for each project is accurate Inaccurate forecast can impact organizational staffing
Review “Task Wise” Resource Reports to compare Allocations vs Actuals	To ensure resources effort is matching their allocations

Open Discussion #2

- How much time do you spend managing resource data?
- What best practices, tips or tricks have you discovered?
- Do you use Operational Resource Plans in your organization?



Format of This Session

- In the next set of slides, Rego has compiled a set of tips, tricks and best practice points related to functionality.
- It may seem choppy, because it is.
- Each slide is a different best practice point, so there is not a “flow” between slides in many cases.

Rego

Best Practices / Tips and Tricks



Let Rego be your guide.

Implementation Best Practices

1. You don't need a high degree of precision to make effective resource management decisions. The more precision you attempt to get, the more time and effort will be required. There is a point of diminishing returns.
2. If you've never done something like resource management which takes a bit of coordination and consistency across many groups and functions, it would be best to take a **crawl, walk, run** approach—start simple and then build it out further only if it makes sense.
3. Resource management is more about building **effective and rather regimented processes** and **constantly improving**; such as Agile approaches.

Availability Best Practices

- When possible, use the ServiceNow Schedules to remove availability for the specified periods
- Add company holidays to the Holiday Schedule
 - In multi-national organizations, it is best to use multiple schedules to represent various holidays and work times (8hr day vs. 7hr day, United States, vs Philippines, etc.)
- Add the holiday schedule as a child schedule to the default “Resource Management Schedule”.
- Run the “Update Resource Capacity” job to update resource capacity based on the new schedule.

Allocation Best Practices

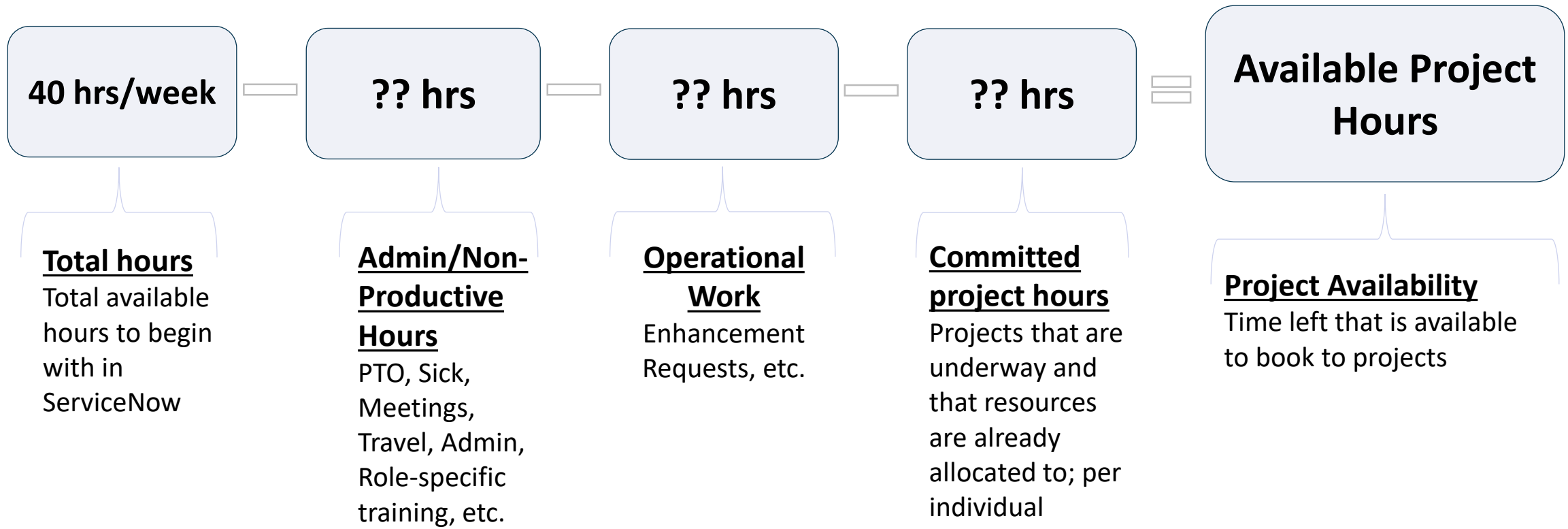
- Manage allocations by the month when first starting out.
- Adjust expectations of accuracy and granularity-based time horizon (e.g., 100% allocated for next 4 weeks, +/- 10% for 4-8 weeks, +/- 20% for 8-12 weeks).
- Compare Allocation against the prior **two months** of Actuals.
- Resource Managers should schedule staffing meetings to review and update allocations with staff.

Reporting Best Practices

- The OOTB views are enough to manage resources – resource availability, utilizations, allocations, and allocation details. However, often additional reporting can assist to ensure the data is:
 - Personalized for the user and use case
 - Summarized to see issues immediately
 - Drillable to allow quick view and update of issues
- Some sample views we have seen successful are:
 - Project Manager and Resource Managers should compare Actuals (typically the last 4 weeks) against the Allocations to determine if future resource commitments should be adjusted: **Allocation Workbench** and **Resource - Task wise - Groups Member Allocation Details - Monthly (Hrs) report**
- Define your own dashboard that displays your teams' resource allocations.

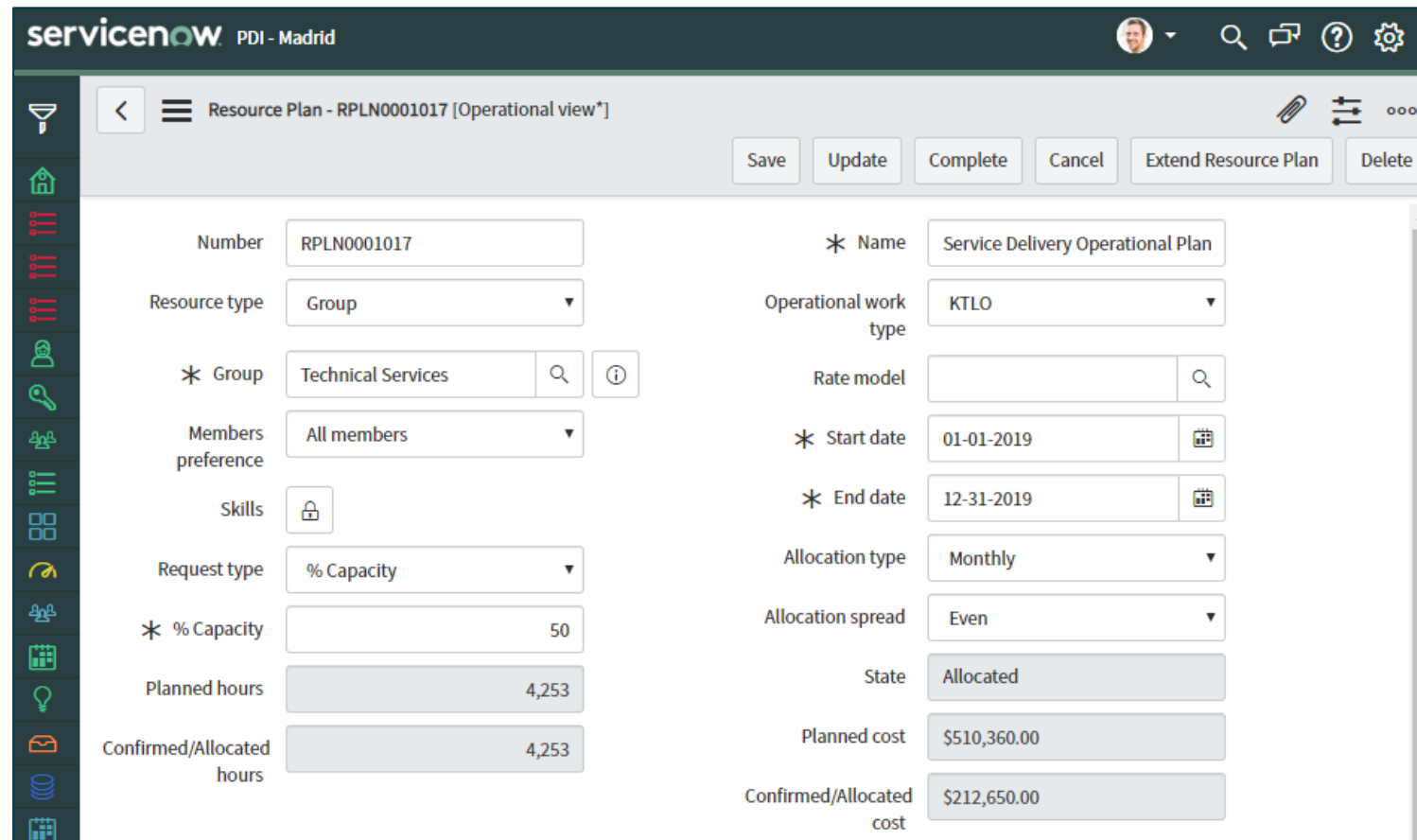
Tips and Tricks – Operational Resource Plans

Use Operational Resource Plans to reduce availability for the operational work performed by your team or other Admin/Non-productive time.



Tips and Tricks – Operational Resource Plans

Use **% Capacity** to easily earmark Operational Resource Plans to reduce availability and earmark operational work



servicenow PDI - Madrid

Resource Plan - RPLN0001017 [Operational view*]

Save Update Complete Cancel Extend Resource Plan Delete

Number	RPLN0001017	* Name	Service Delivery Operational Plan
Resource type	Group	Operational work type	KTLO
* Group	Technical Services	Rate model	
Members preference	All members	* Start date	01-01-2019
Skills		* End date	12-31-2019
Request type	% Capacity	Allocation type	Monthly
* % Capacity	50	Allocation spread	Even
Planned hours	4,253	State	Allocated
Confirmed/Allocated hours	4,253	Planned cost	\$510,360.00
		Confirmed/Allocated cost	\$212,650.00

Tips and Tricks – Notifications

- Setup notifications for specific actions such as Requested or Rejected Resource Plans to start off with until everyone gets familiar with the process/cadence, then deactivate if no longer necessary.
- Emails will provide direct links into ServiceNow for an action.

Grant Zemont,

A Resource has been requested from your team.

Further details pertaining to Resource Plan, [RPLN0001039](#) are below

Task: Oracle Upgrade 2.0

Project Manager: Michael Meyers

- Group resource: Business Analyst
- Planned hours: 22
- Start date: 07/08/2019
- End date: 08/30/2019
- Notes:

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Ref:MSG14876001

Tips and Tricks – Delegate Time Sheet Approval

In Madrid and later, setup a delegate to approve your teams Time Sheets while you are out of town, if you don't use auto approve.

The image consists of three screenshots from the ServiceNow PDI - Madrid interface, illustrating the steps to create a delegate for time sheet approval.

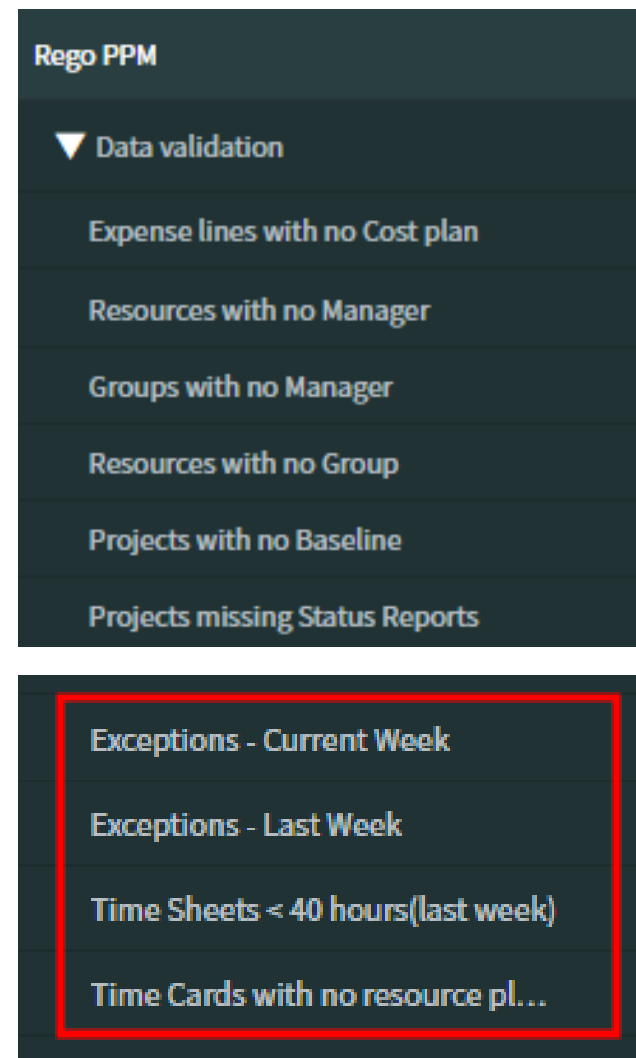
Step 1: The first screenshot shows the user profile dropdown menu. The 'Profile' option is highlighted with a red box and a red circle with the number 1.

Step 2: The second screenshot shows the 'Delegates' tab in the navigation bar. The 'Delegates' tab is highlighted with a red box and a red circle with the number 2. Below it, the 'New' button is also highlighted with a red box.

Step 3: The third screenshot shows the 'Delegate New record' form. The 'User' field is set to 'System Administrator'. The 'Delegate' field is set to 'Paul Martin (Project Mgr)'. The 'Starts' field is set to '09-30-2019 00:00:00' and the 'Ends' field is set to '10-04-2019 00:00:00'. The 'Approvals' checkbox is checked. The 'Submit' button is at the bottom. A red box highlights the 'Delegate' field and its associated date fields, and a red circle with the number 3 is next to the 'Approvals' checkbox.

Tips and Tricks – Data Maintenance

- Ensure you have solid notifications and reporting – this will help take the “noise” out of end user complaints. You have given them easy ways to see and links to correct data.
- Create Data Validation reports to highlight missing or bad data.
- Foster positive competition with a **Compliance dashboard**.



Tips and Tricks – Task Wise Resource Report

Resource – Task wise – Group Member Allocation Details – Monthly (Hrs) shows Allocations vs Actuals for each user in a group over time.

- Note: Only shows if actuals when tied to allocations of a resource plan.

Resource - Task wise - Group Member Allocation Details - Monthly (Hrs)																						
▼ Hours		Month starts on	01-01-2018		02-01-2018	03-01-2018		04-01-2018		05-01-2018		06-01-2018		07-01-2018		08-01-2018	09-01-2018	10-01-2018		11-01-2018	12-01-2018	Sun
		Parent category	Allocated	Actual	Allocated	Allocated	Actual	Allocated	Actual	Allocated	Actual	Allocated	Actual	Allocated	Actual	Allocated	Allocated	Allocated	Actual	Allocated	Allocated	
User	Task Short description		Allocated	Actual	Allocated	Allocated	Actual	Allocated	Actual	Allocated	Actual	Allocated	Actual	Allocated	Actual	Allocated	Allocated	Allocated	Actual	Allocated	Allocated	
▼ Alva Pennigton	Total		128		160	196	24	196	176	191	184	166	168	35	96	119	140	175	40	173	95	2,462
	(empty)																	4		3	3	10
	Application Rationalization																		40			40
	IT Asset Management Rollout					80	24	168	176	191	184	166	168	35	96							1,288
	Network Monitoring System															119	140	171		170	92	692
	Upgrade printers in all office locations		128		160	116		28														432
▼ Beth Anglin	Total		9	126	73	246	154	202	147	190	161	54	147	91	157	165	195			202	121	2,440
	(empty)																	4		4	4	12
	Implement Fleet Management Application				45	198	154	188	147	190	161	54	147	91								1,375
	Network Monitoring System															157	165	191		198	117	828
	Replace SVN with git		9	126																		135
	Upgrade printers in all office locations				28	48		14														90

Tips and Tricks – Allocation Workbench

Add the **Actuals** breakdown column to your Allocation Workbench to see Allocated and Actual hours by resource plan and user.

The screenshot shows the Allocation Workbench interface. The main table displays resource plans and their allocation across months. The 'Actuals' column is highlighted with a red box. The Configuration panel on the right shows the 'BREAKDOWN COLUMNS' section, where the 'Actuals' option is checked and highlighted with a red box.

Resource name	Planned	State	Jul 2019			Aug 2019			Sep 2019		
			Planned	Conf/Alloc	Actuals	Planned	Conf/Alloc	Actuals	Planned	Conf/Alloc	Actuals
Develop New Employee Portal											
▶ [G] Analysts 1 FTE Confirmed			176	176		184	184		160	160	
HCM Implementation											
▶ [U] Troy McCooy (Tea...) 0.2 FTE Allocated			36	36	16	35	35		34	34	
▶ New Benefit Tracking Page											
▶ New Big Room Planning Page											
▶ New CIO Dashboard											
▶ Upgrade all Oracle 10g database ...											
▶ Upgrade Supplier Portal											

Group → User → Task	Jul 2019			Aug 2019		
	Confirmed	Allocated	% Utilization	Confirmed	Allocated	% Utilization
Core R&D Group		292	50.34		331	57.87
▶ Cyril Behen		148	80.44		85	48.3
▶ Darren Merlin		73	36.87		38	38.38
▶ Sabrina Deppert		71	35.86		208	202.02

Open Discussion #3

- How do you know if your data is good?
- Which reports/dashboards do you use to report capacity, demand and other resource management information?



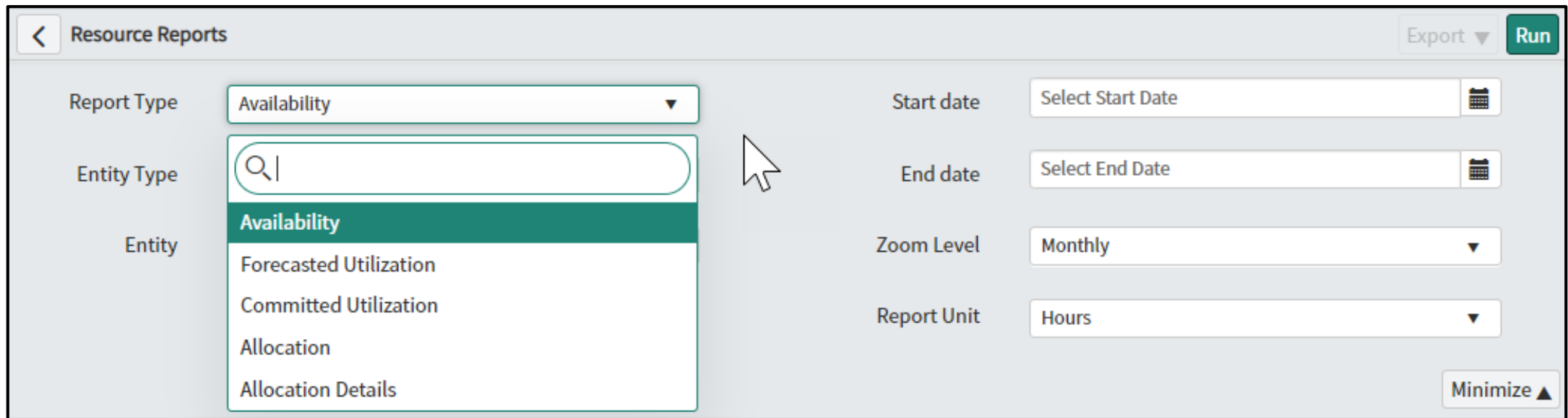
OOTB Resource Reports



Let Rego be your guide.

Resource Reports

- Resource Reports allow you to see who is working on what on your team (or individual person) over time.
- Go to **Resource> Resource Reports> Resource Reports** to access the 5 Reports:
 - Availability
 - Forecasted Utilization
 - Committed Utilization
 - Allocation
 - Allocation Details

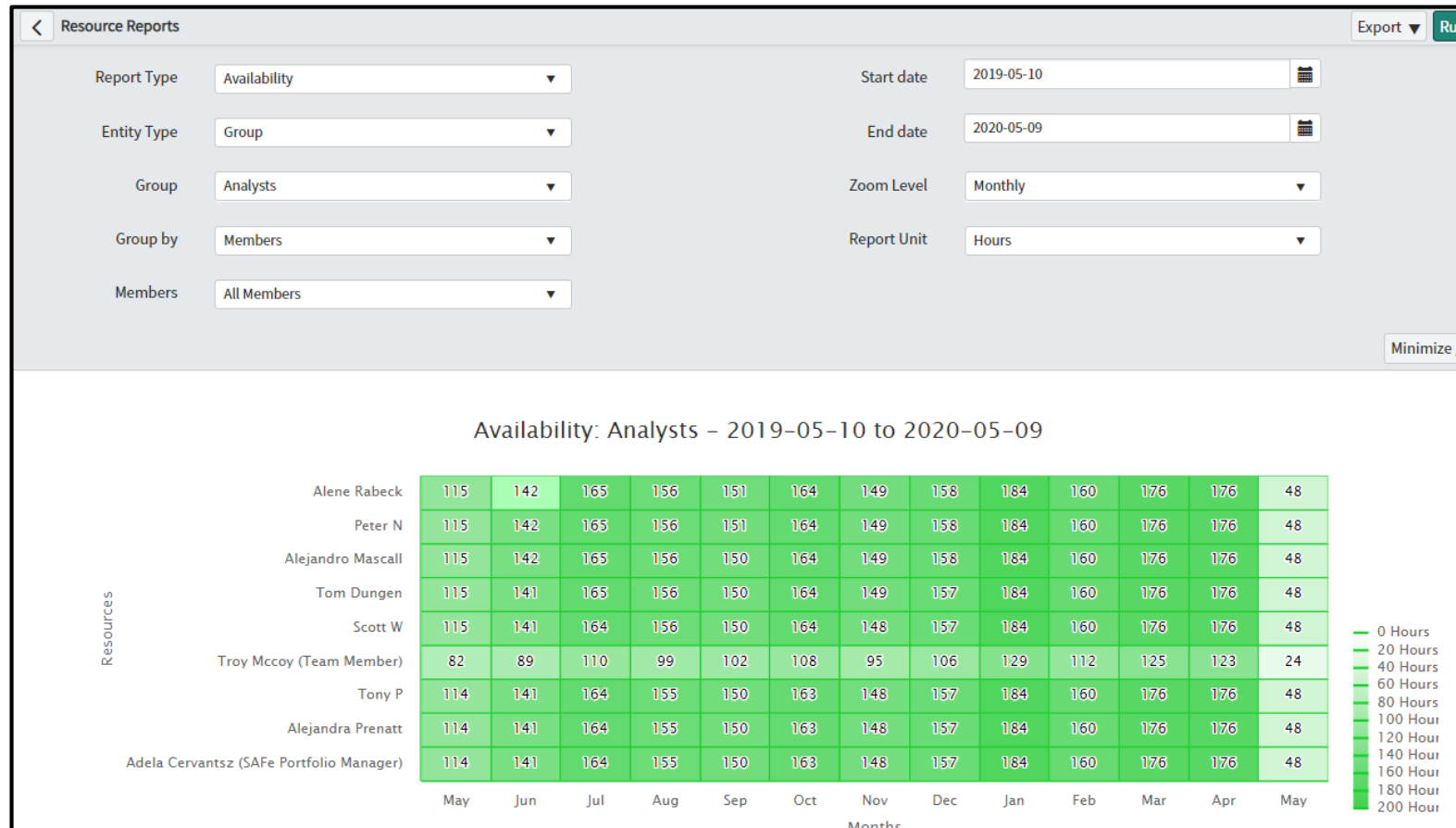


The screenshot displays the 'Resource Reports' interface. At the top left is a back arrow and the title 'Resource Reports'. At the top right are 'Export' and 'Run' buttons. The main area contains several filters: 'Report Type' is set to 'Availability'; 'Entity Type' is a search bar with a magnifying glass icon; 'Entity' is a dropdown menu with a list of options: 'Availability' (highlighted in green), 'Forecasted Utilization', 'Committed Utilization', 'Allocation', and 'Allocation Details'; 'Start date' and 'End date' are both set to 'Select Start Date' and 'Select End Date' respectively, each with a calendar icon; 'Zoom Level' is set to 'Monthly'; and 'Report Unit' is set to 'Hours'. A 'Minimize' button is located at the bottom right.

Resource Reports – Availability

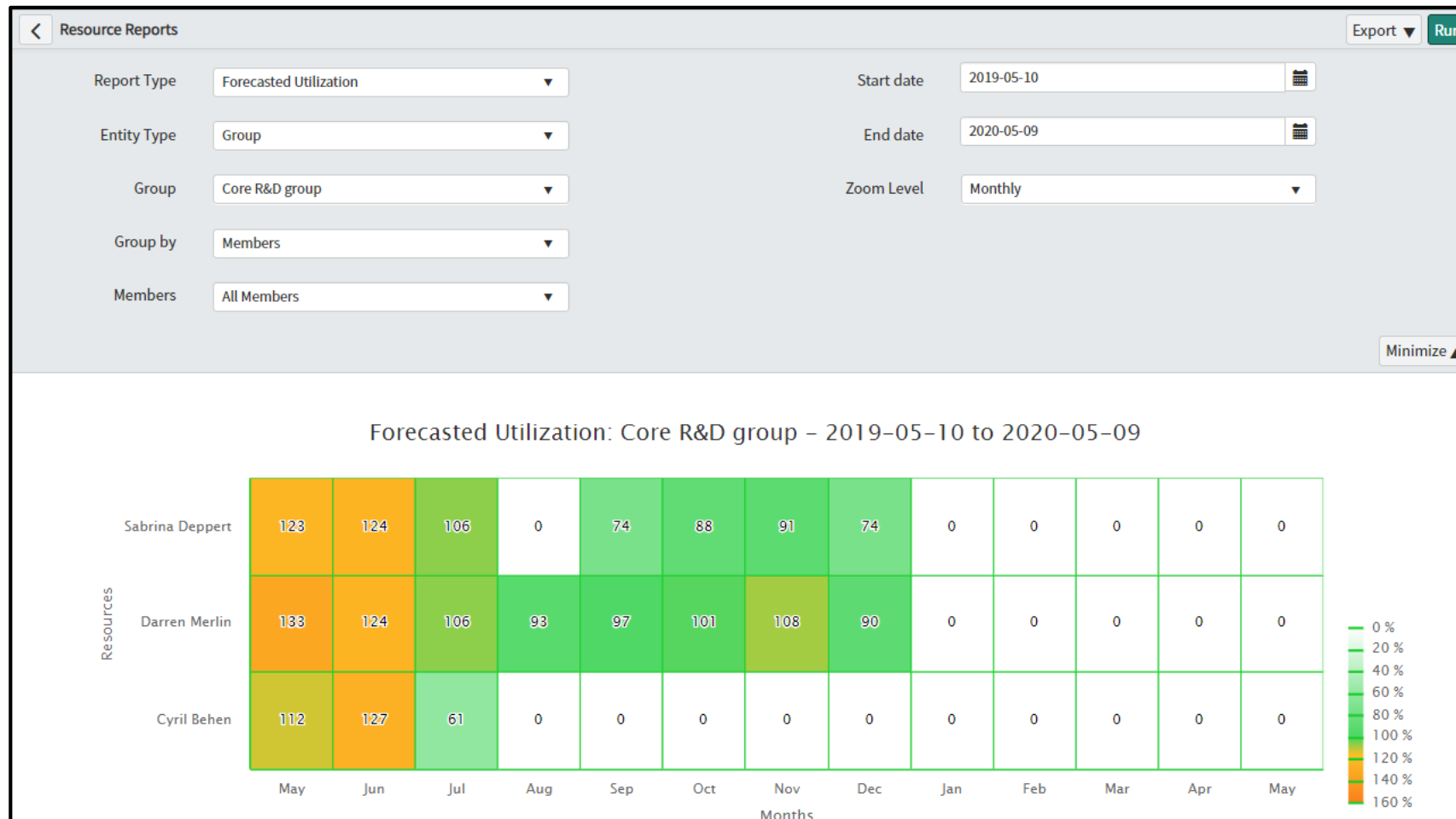
Total time that the resources are available after both **hard and soft allocations**.

Availability = Capacity - Allocation.



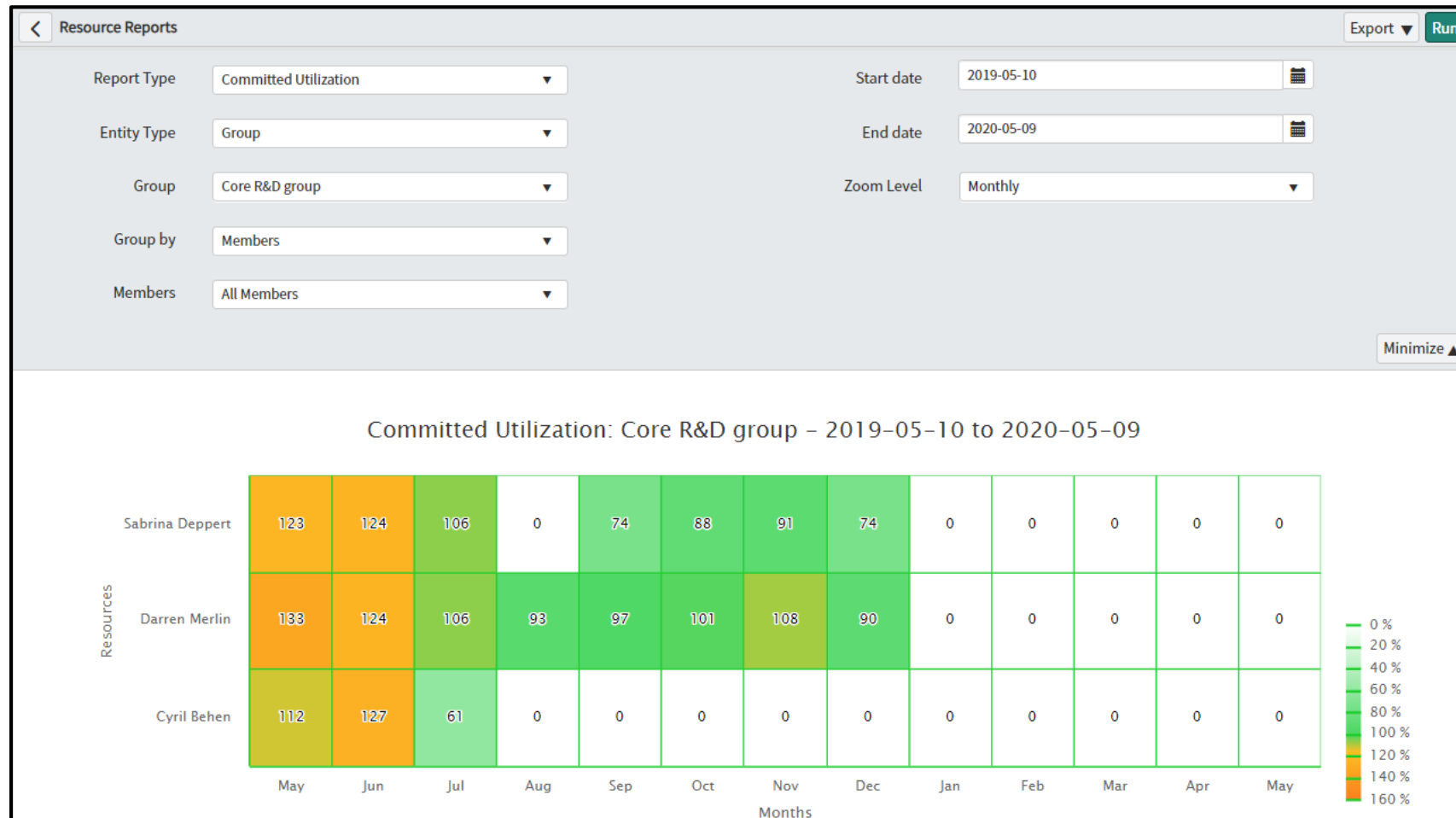
Resource Reports – Forecasted Utilization

Percentage of forecasted resource time utilization (includes soft and hard allocations).



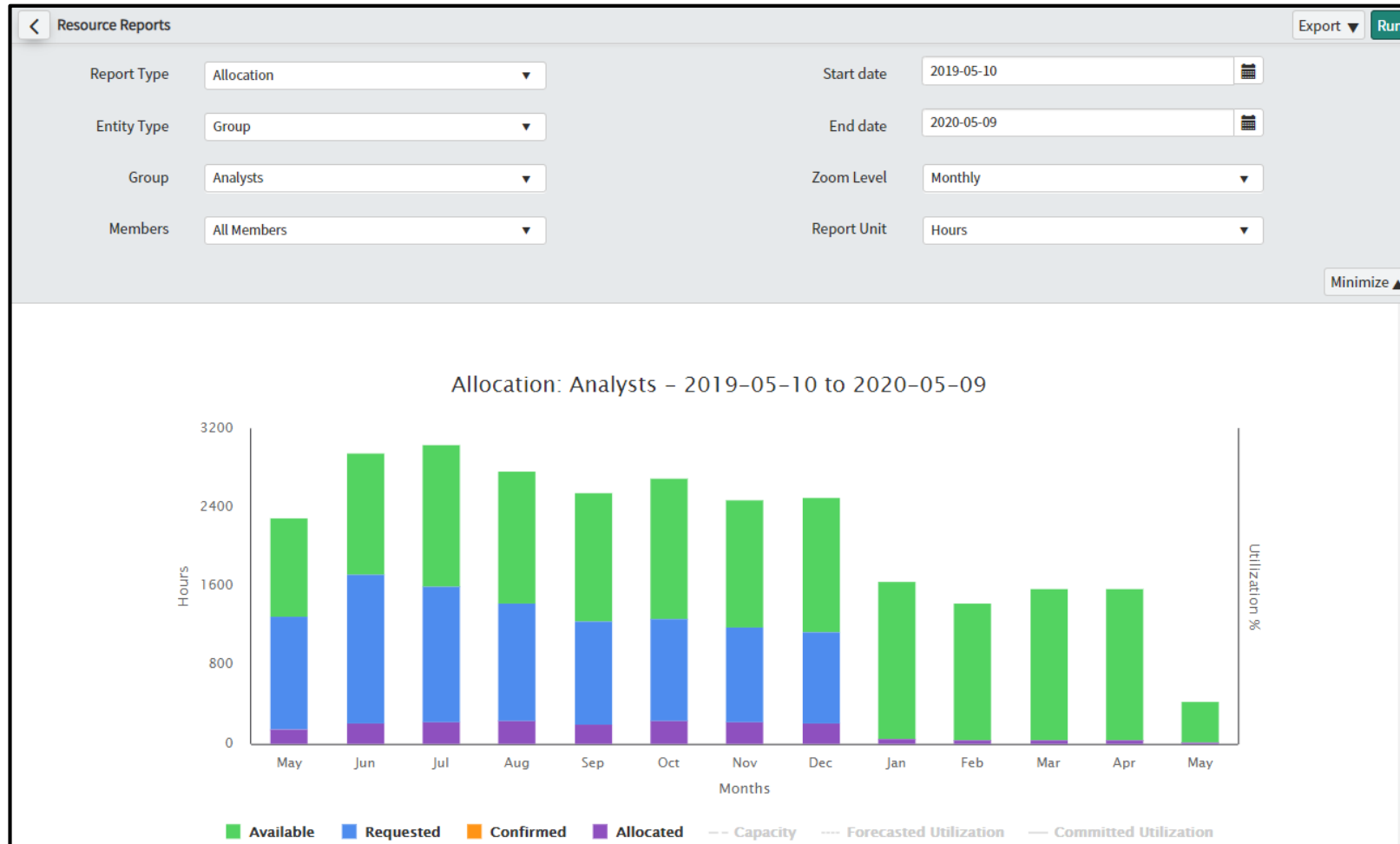
Resource Reports – Committed Utilization

Percentage of committed resource time utilization (hard booked/allocated).



Resource Reports – Allocation

Percentage of committed resource time utilization (hard booked/allocated).



Resource Reports – Allocation details

A tabular breakdown of all allocation requests (soft bookings), committed allocations (hard bookings), and availability and capacity hours.

Resource Reports
Export
Run

Report Type: Allocation Details
Start date: 2019-05-10
Entity Type: Group
End date: 2020-05-09
Group: Analysts
Zoom Level: Monthly
Members: All Members
Report Unit: Hours
Minimize

Allocation Details: Analysts - 2019-05-10 to 2020-05-09

Resource	May					Jun					Jul						
	Capacity	Requested	Confirmed	Allocated	Available	Capacity	Requested	Confirmed	Allocated	Available	Capacity	Requested	Confirmed	Allocated	Available	Capacity	Requested
Adela Cervantsz (SAFE Portfolio Manager)	128	0	0	14	114	160	0	0	19	141	184	0	0	20	164	176	0
Alejandra Prenatt	128	0	0	14	114	160	0	0	19	141	184	0	0	20	164	176	0
Tony P	128	0	0	14	114	160	0	0	19	141	184	0	0	20	164	176	0
Troy Mccoy (Team Member)	128	0	0	46	82	160	0	0	71	89	184	0	0	74	110	176	0
Scott W	128	0	0	13	115	160	0	0	19	141	184	0	0	20	164	176	0

Questions?



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- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



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