regoUniversity 2019

SAN DIEGO

Idea/Demand/Project Management | OOTB Introduction

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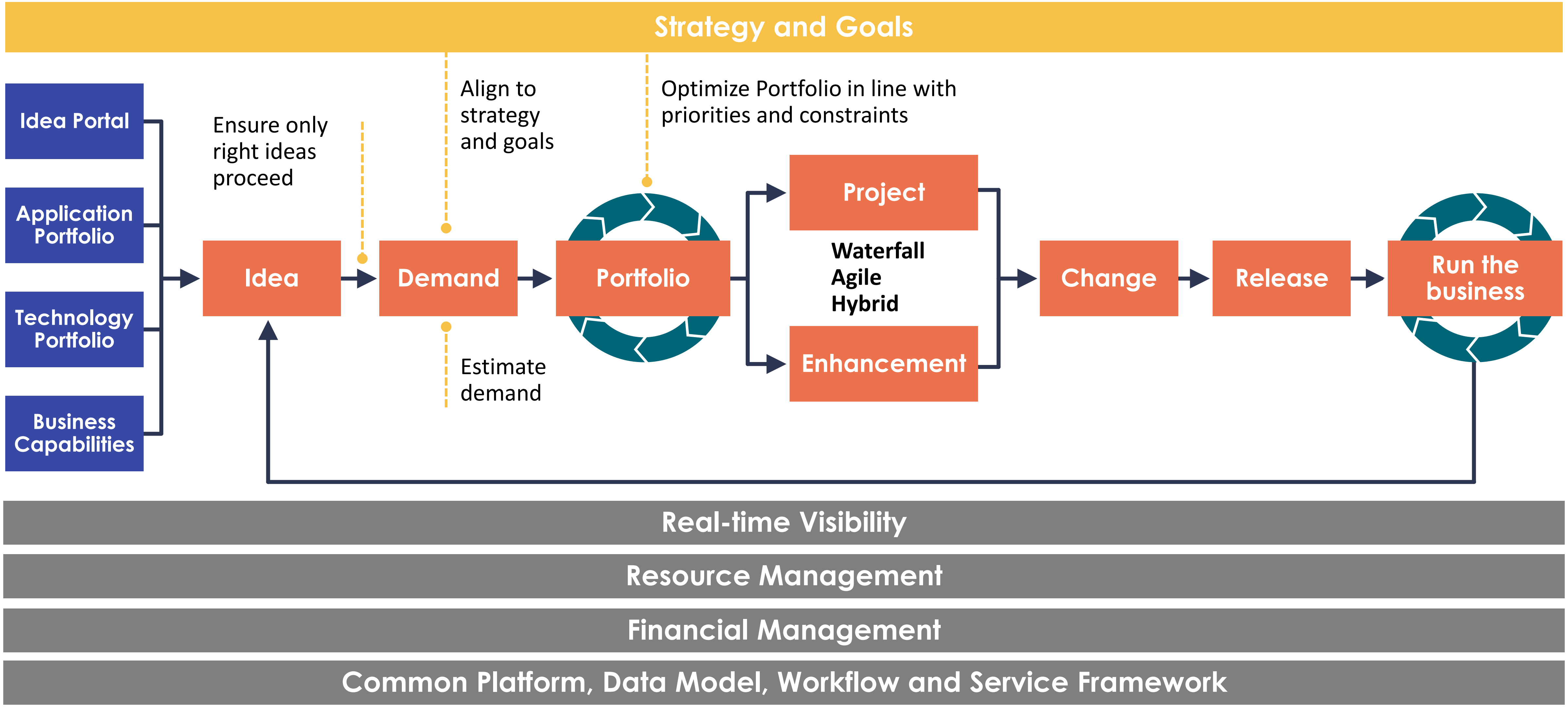
Introductions

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

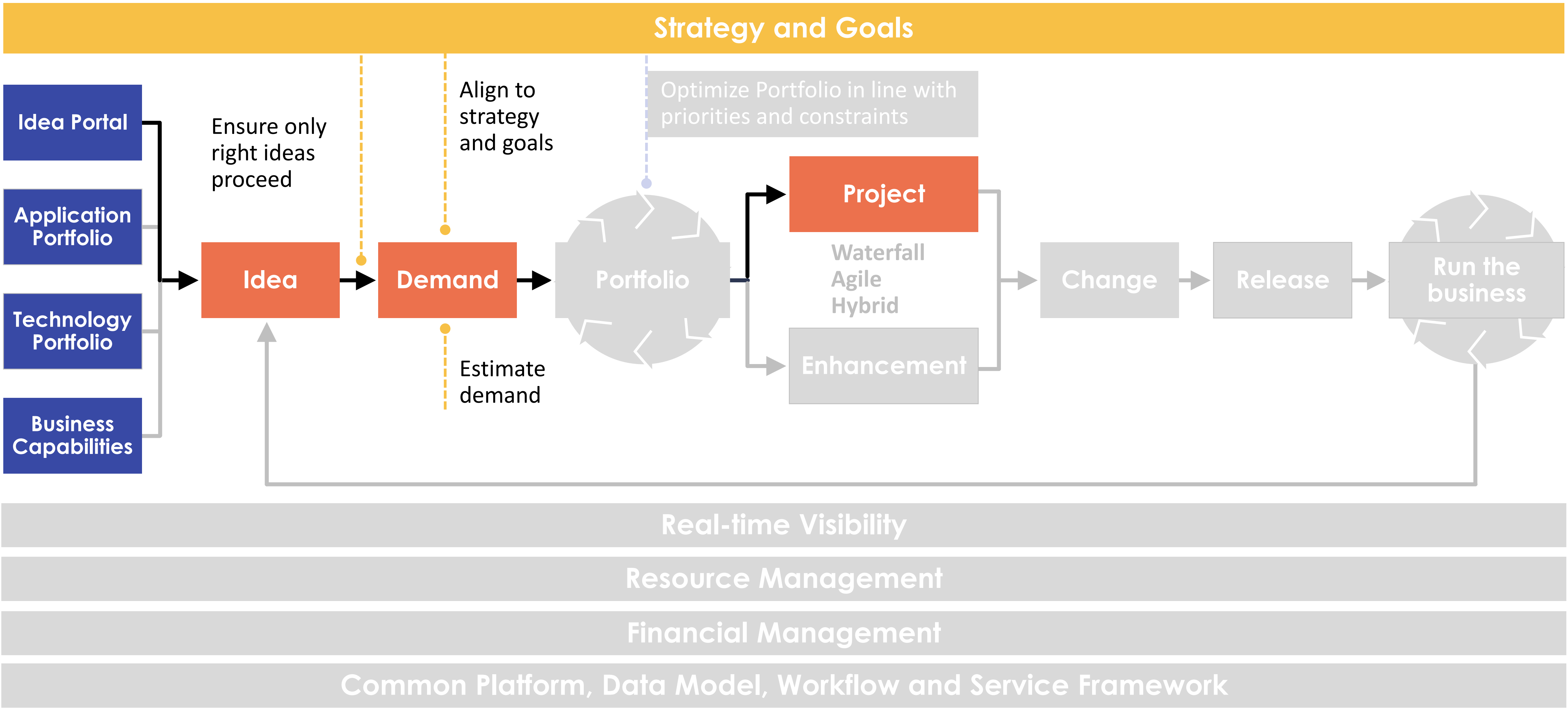
Agenda

- Submitting and Vetting Ideas
- Evaluating Demands
  - Demand Management Flow
  - Demand Workbench
- Managing Projects
  - Components of a Project
  - Investment Portal

ServiceNow PPM Flow



Today's Focus



Demand Management - Ideas

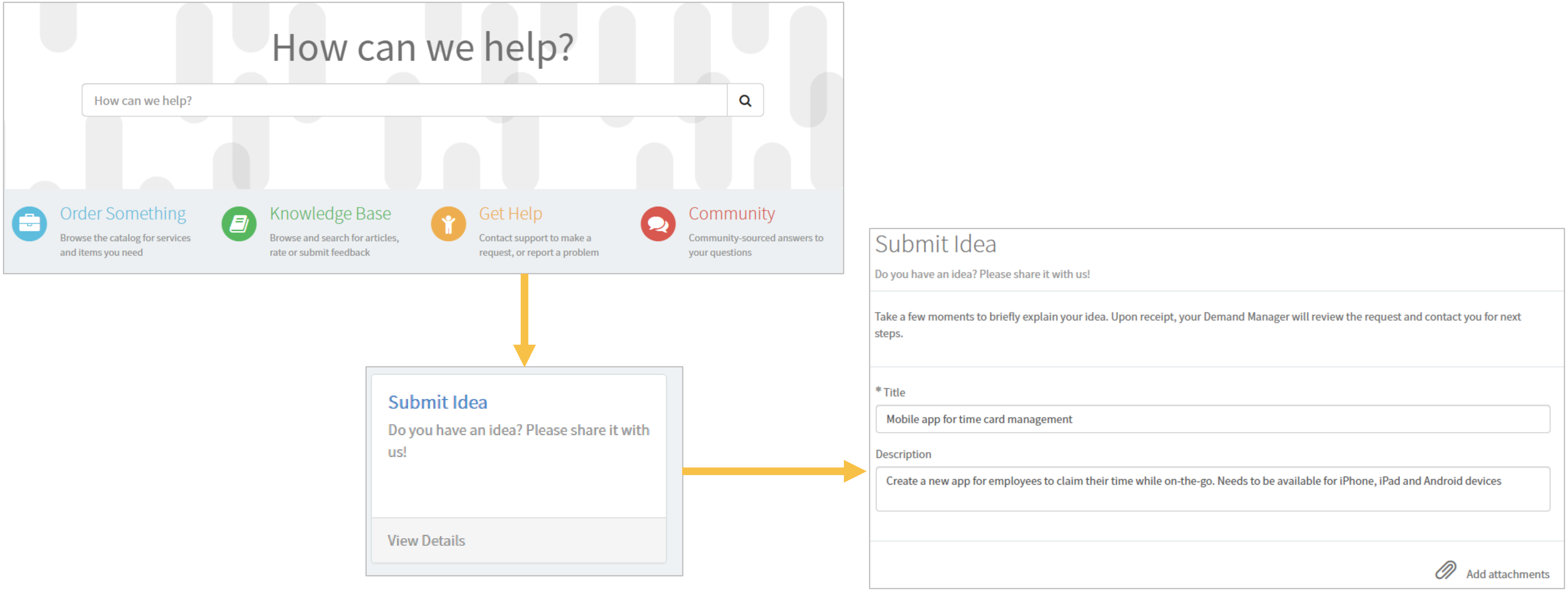
What Is an Idea?

An Idea is a thought, conception or notion according to Webster. In Project Management, a new idea needs to add value to the business. Some common elements that constitute a good idea are:

- **Different or Better** – A new idea should not only be slightly different, but it should be better than the current solution.
- **Delivers Value** – Not only will the idea help something be better, but it will be something somebody actually wants.
- **Doable** – A new idea needs to be possible to move forward
- **Acceptable Cost-Benefit** – A new idea has to consider time, cost, resources, etc. If the idea cost more that its value, will somebody be willing to financially back it?

Submitting a New Idea

Service Portal > Get Help > Submit Idea



Vetting Ideas

Ideas act as the 1st step in the Work Intake funnel, and should be vetted for accuracy and validity:

- For Ideas that are determined to be valid and worth scoping, convert to a Demand
- For Ideas that are determined to be invalid or not a current focus of the organization, **Defer** them or **Delete** them.

Demand Management - Demands

Overview of Demand Management

Demand Management

- A way to capture, evaluate, prioritize and approve business requests for implementation consideration.

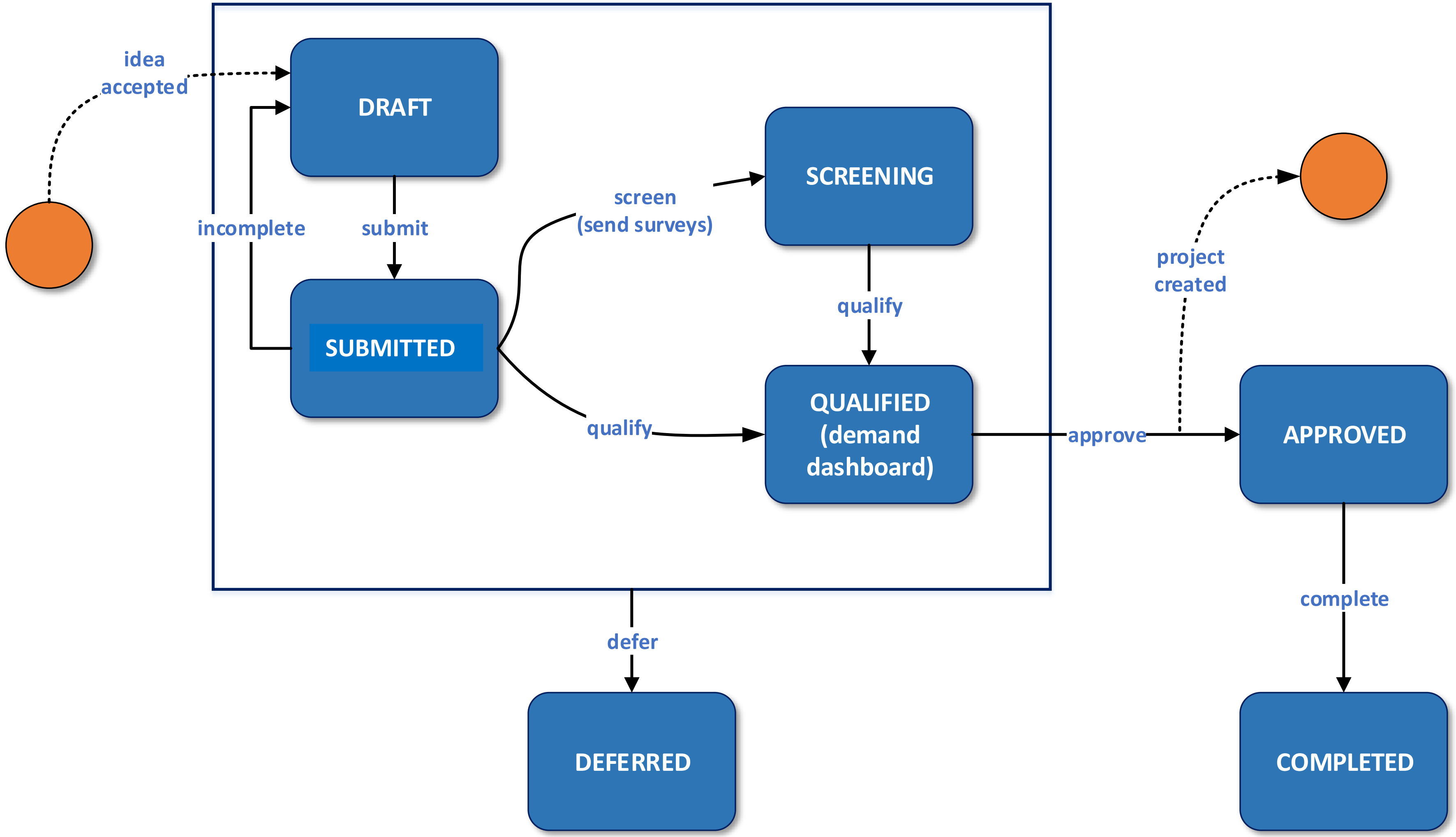
Roles

- **Demand User** – Creates new Demands. Edits or updates the Demand until it is ‘submitted’.
- **Demand Manager** – Approves Ideas & Demands. Enhances Demands by adding stakeholders, risks, decisions and resource plans.

Basics of Demand Management

- Set up the application: Plan, create stakeholders and assessment categories, modify bubble charts (Demand Workbench) if need be.
- Assess ideas: Review and analyze submitted ideas before promoting ideas to demands.
- Create and manage demands: Create, enhance by adding stakeholders and assessments, and evaluate and qualify demands.
- Use the Demand Workbench to compare and assess demands, and promote demands to projects, enhancements, changes, or defects.

Demand Management Workflow

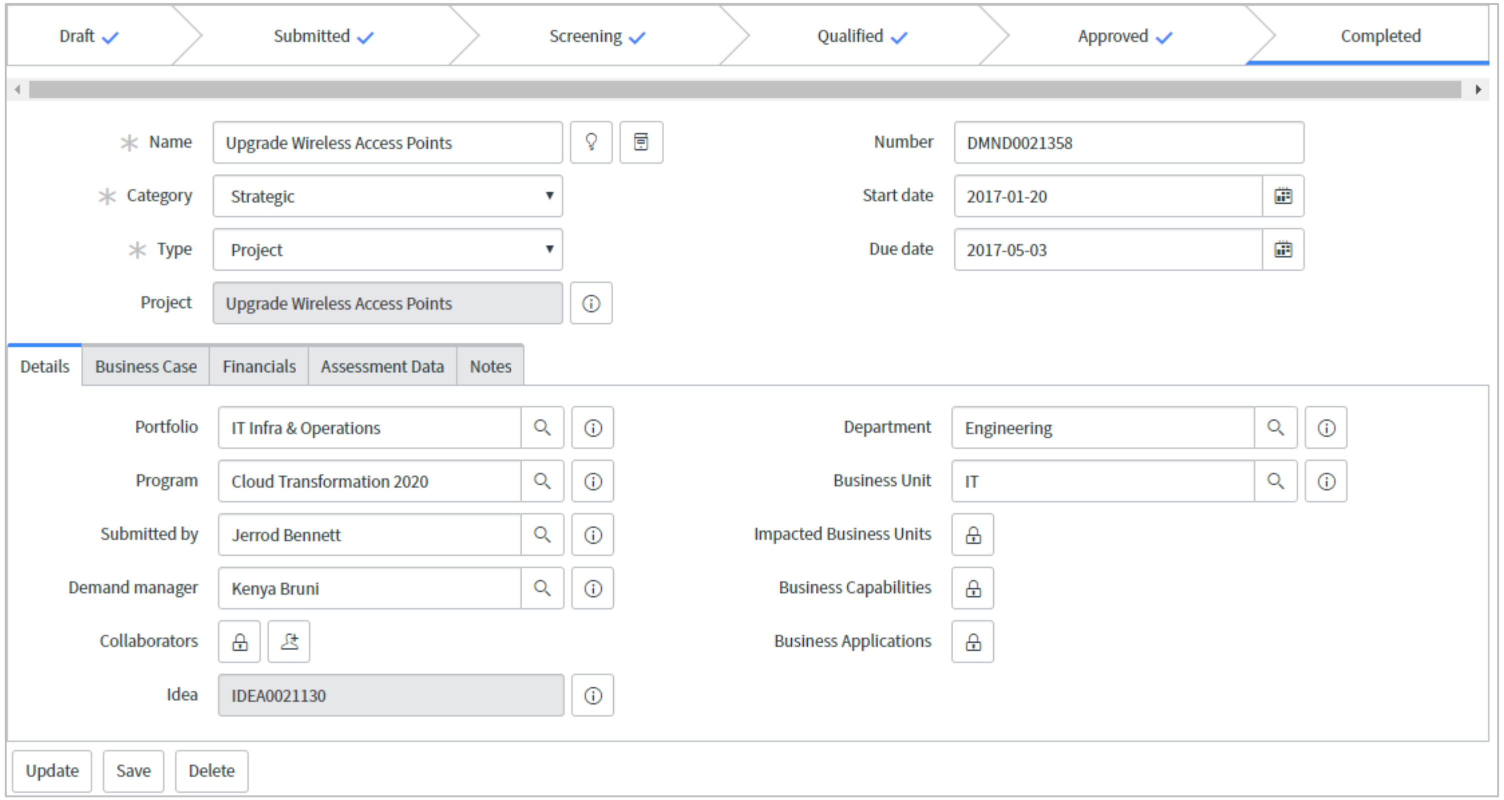


Demand States

Demand State	Description
Draft	A submitted Idea that has been converted to a Demand.
Submitted	A Demand that is formally ready for review. Initial information is populated for Stakeholders.
Screening	The Demand Manager initiates Assessments, if needed.
Qualified	The Demand has been Qualified and is ready for Portfolio review. Qualified Demands can be seen on the Demand Workbench.
Approved	The Demand is approved and can be converted to a Project, Change, Defect, or Enhancement creation.
Completed	The Demand has been completed as a Project, Change, Defect, or Enhancement.
Deferred	Demand that has been set to Deferred (Canceled/On Hold).

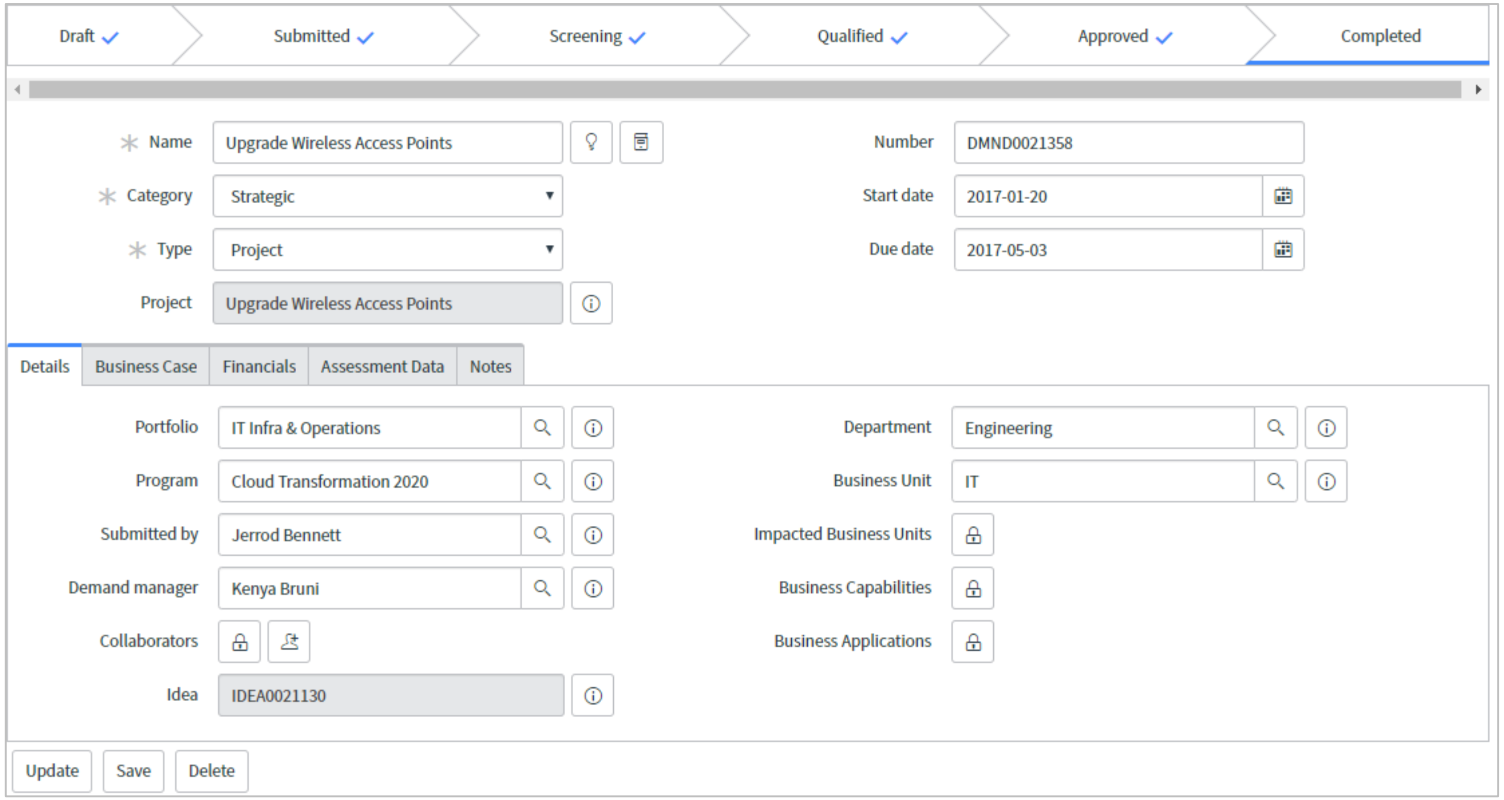
Demand Form – Key Fields (1)

- **Name** – Name of the Demand
- **Category** – Strategic or Operational
- **Type** – The type of record to be created if this Demand is eventually approved: project, enhancement, defect, or change
- **Portfolio** – Portfolio that this Demand falls under.
- **Program** – Program that this Demand is a part of.
- **Demand manager –** The person responsible for ushering the Demand through the process.



Demand Form – Key Fields (2)

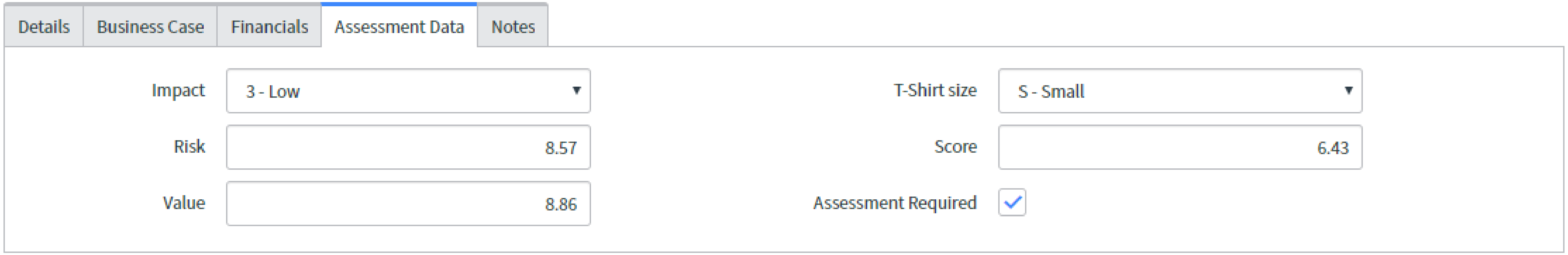
- **Project –** field will populate with project number when project is created.
- **Number -** Unique, auto generated number.
- **Start Date –** Date the project is to start.
- **End Date –** Date the project is to end.
- **Submitted by –** Individual that submitted the Demand.
- **Idea –** the idea number associated to the Demand.



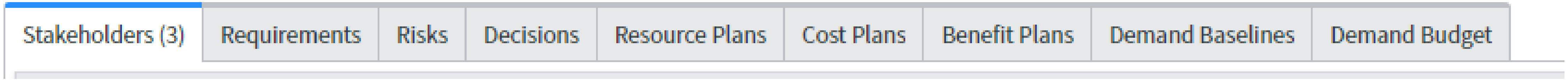
Demand Form – Assessment Data

The **Assessment Data** form captures additional business information regarding the Demand, such as costs, benefits, and sizing estimates.

Score - Calculated based on **risk, value**, and **size** attributes in the base system. The value of the risk, value, and size attributes is based on the Demand assessments. When risk and size are high, the score of the demand is low. When value is high, the score of the demand is high.



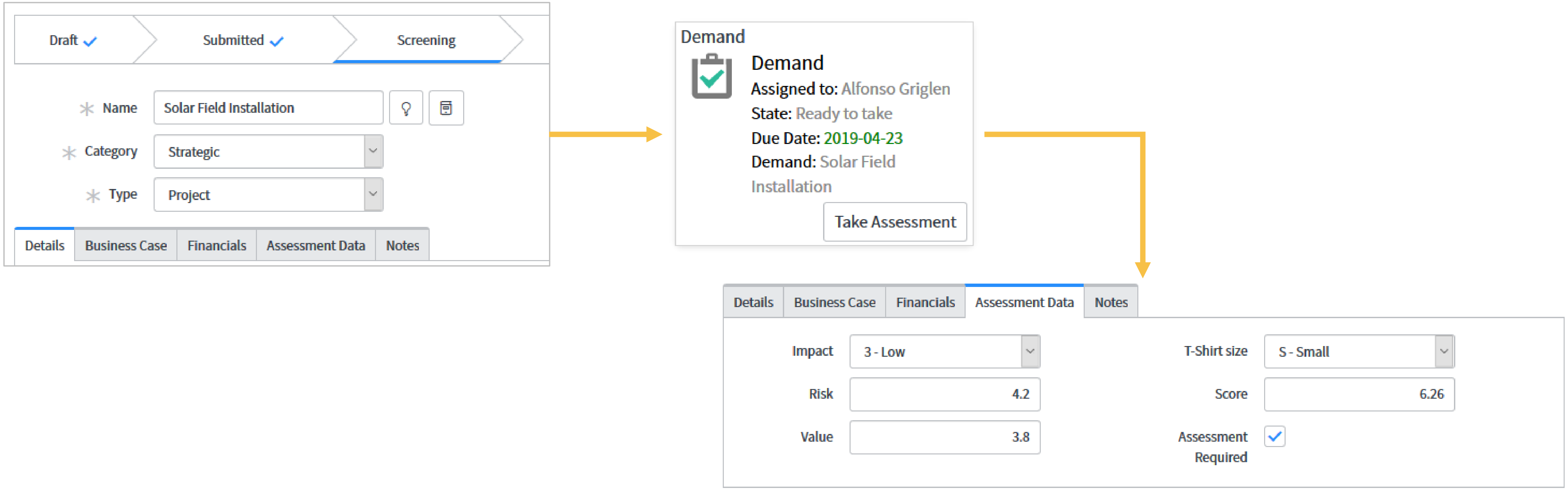
Demand Form – Related Lists



- The **Stakeholders** list is populated automatically from the associated Portfolio.
- If there are any risks that need to be captured in relation to the Demand, log them on the **Risk** tab.
- If there are any decisions that need to be captured in relation to the Demand, log them on the **Decisions** tab. The decisions will transfer when the project is created.
- This tab is a listing of all **Resource Plans** in all States against the Demand. New Resource Plans can be created from here.
- The **Cost Plans** tab shows all costs against the Demand, including costs from Resource Plans.
- The **Benefit Plans** related list shows the aggregated benefits for estimated and actual benefits for each fiscal period for the Demand.
- **Demand Baselines** lists all financial baseline information (snapshot of cost plan, benefit plan, and demand-level financial metrics) at a particular moment in time.
- Lists the **Demand Budget** by fiscal year as set within Portfolios, or via the Demand Budget Related Link.

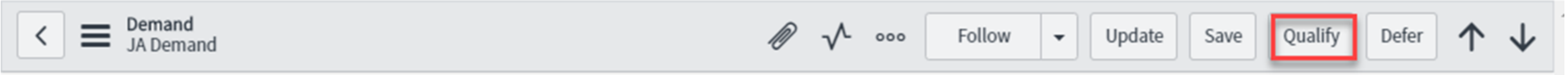
Screening the Demand

- Once the Demand has been properly scoped, by moving the Demand to **Screening** State, an Assessment Survey is sent to the Stakeholders on the Demand.
- Completing the Assessment Survey calculated scores on the Assessments tab, which then plots the Demand on Demand Workbench.



Qualifying the Demand

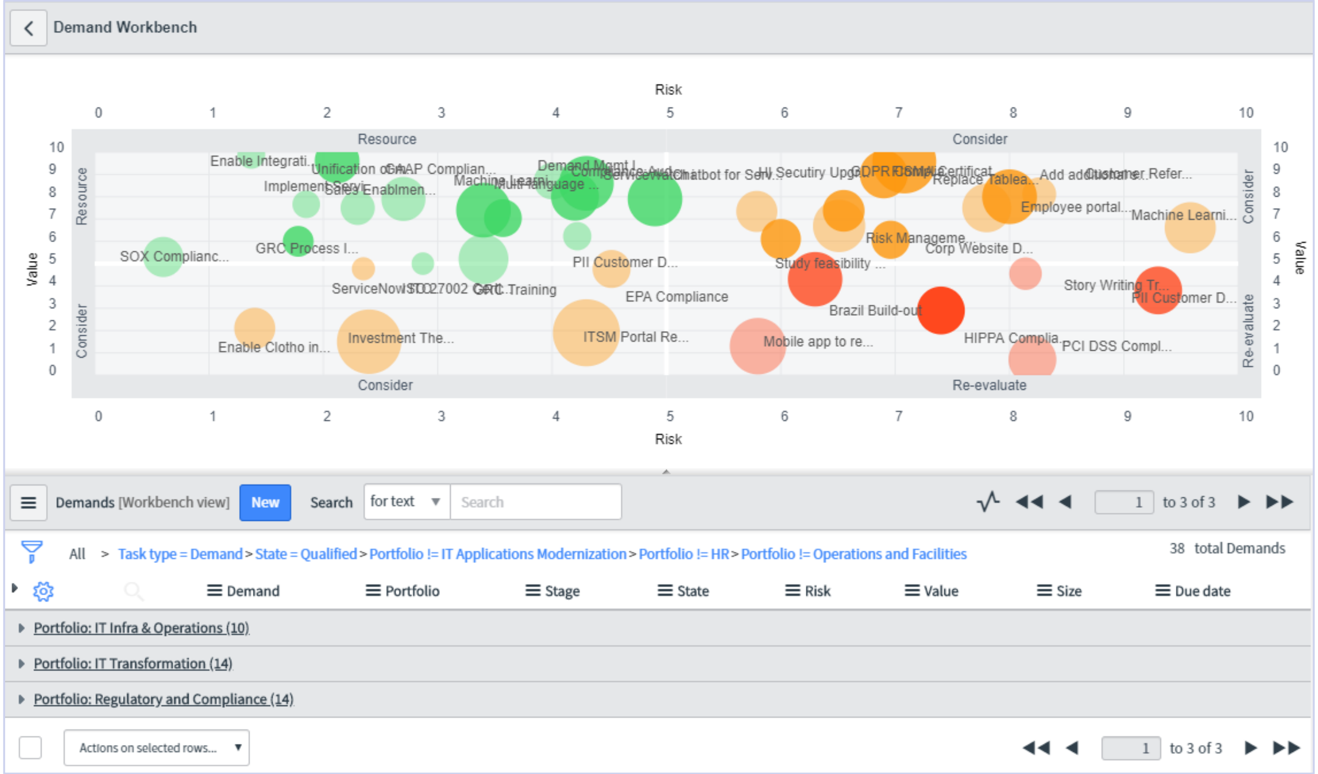
- Once the Demand has been properly scoped, the Demand Manager can set the Demand to the Qualified state by clicking Qualified.



- At this point, the portfolio review should begin by using the Demand Workbench. From the review, a go/no-go decision can be made weather or not to approve the Demand.

Demand Workbench

- The Demand Workbench provides a central location for viewing and assessing business demands, enhanced by Stakeholder Assessments.
- The Demand Workbench provides real-time interaction between the two panes. Modifying a Demand in the bubble chart automatically updates the values in the Demand record. Similarly, changes made to a Demand record are automatically reflected in the bubble chart.
- Performing the following tasks in the list view affects the demands displayed in the bubble chart:
    - Searching or filtering the records in the list view displays the bubbles for those demands that meet the search or filter criteria.
    - Adding or deleting records in the list view adds or deletes the corresponding bubbles.
    - Paginating the list view by clicking any of the page arrow icons displays the bubbles for the demands that appear on the current page.



Approving the Demand

- If it is determined through qualifying that the Demand should be executed it can be approved. Note: Demands can also be approved through the Portfolio Workbench when the portfolio for the fiscal year is **Confirmed**.
- To approve through the Demand form, click the **Approve** button.

- Once the Demand has been approved the project can be created. The Demand **Type** and **Category** determines the artifact to be created: an enhancement, defect, or change can also be created.

Projects

Overview of Project Management

- A Project is any planned, collaborative effort that is designed to achieve an objective
  - Key elements are tasks and staff
  - Tasks define project work
  - Staff are resources who perform the work
- Top Project Constraints are time, cost, and resources
  - ServiceNow PPM lets you manage each constraint
    - Determine project length
    - Determine cost based on actual costs (Expense Lines)
- ServiceNow PPM has the flexibility to manage your project throughout the life of the project, adapting to changing complexity or business demands (Risks, Issues, Decisions, Action Items, and Change Requests)

Project States

Project State	Description
Pending	Used to identify a Project that has been created, but no prep work has yet begun.
Open	Can be used to allow a PM to begin Project setup, task creation, etc. before officially starting the Project. Some clients consider these activities to be under Work in Progress, so they just skip Open and consider it to be Work in Progress.
Work in Progress	Indicates work on the Project has begun. Clicking the Start Project button in the top right of the Project will change the Status(state) over to Work in Progress. You could also change the Status(state) of a task to Work in Progress and it would update the Project Status(state) to Work in Progress.
On Hold	Project has been put on hold and no work is progressing.
Close Complete	Project was completed and is now closed. No additional work is being done, and no time will be booked against the Project.
Close Incomplete	Project is closed, but was NOT completed. No additional work is currently being done, and no time will be booked against the Project.
Close Skipped	Project was created, but was not completed. Could indicate Project was no longer a viable candidate or no longer wanted.

Project Workspace

The **Project Workspace** enables the project manager to define, plan, track, and monitor a project in a single location. Project managers can also review the status, exceptions, and KPIs in the workspace to take further actions for the project.

The project workspace comprises of the following tabs described at a high level:

- The **Analytics** tab provides analytics on project aspects such as open risks, open issues, and delayed milestones
- The **Details** tab opens the project form and enables you to define important aspects of the project.
- The **Planning** tab opens the project in the planning console. The tab also enables you to navigate to Project workbench and track your project in the workbench.
- The **Resources** tab enables you to find resources, and create and manage the resources plans for the project and project tasks. The tab is available only to a project manager.
- The **Financials** tab displays breakdowns of cost components of a project: planned cost, estimated returns, allocated budget, cost plans, and benefit plans. You can create baselines and compare baselines from this tab to track changes occurring during execution of project or demand.
- The **Status Report** tab displays the project status reports.

Project Workspace - Analytics

The **Analytics** tab provides analytics on project aspects such as open risks, open issues, and delayed milestones.

Status	Percent Complete	Risks	Issues	Actions	Change Requests
Yellow	13.04 %	0	3	0	2

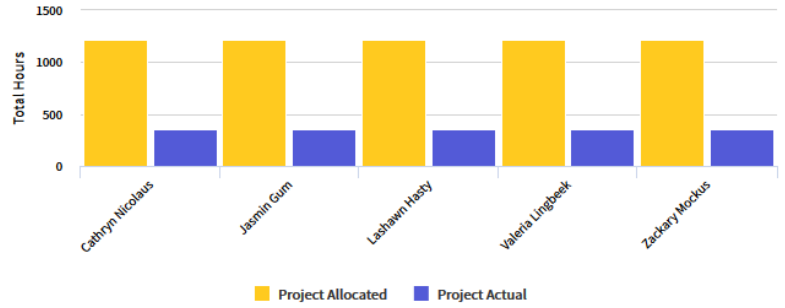
Overdue Tasks and Milestones

Number	Short description	Planned end date	Assigned to	State
PRJTASK0913254	Closing	2018-07-16 17:00:00	(empty)	Pending
PRJTASK0913259	Archive Files/Documents	2018-07-16 17:00:00	(empty)	Pending
PRJTASK0913258	Gain Formal Acceptance	2018-07-10 17:00:00	(empty)	Pending
PRJTASK0913249	Control	2018-07-10 17:00:00	(empty)	Open

Upcoming Tasks (until next 2 weeks) With No Assignee

Number	Short description	Planned start date	Assigned to	State
PRJTASK0913247	Go Live	2018-06-25 08:00:00	(empty)	Pending
PRJTASK0913248	Execution Complete	2018-06-25 08:00:00	(empty)	Pending
PRJTASK0913249	Control	2018-03-31 08:00:00	(empty)	Open
PRJTASK0913250	Project Management	2018-03-31 08:00:00	(empty)	Open
PRJTASK0913251	Project Status Meetings	2018-04-10 08:00:00	(empty)	Pending

Project Member Allocation Details (Hrs)

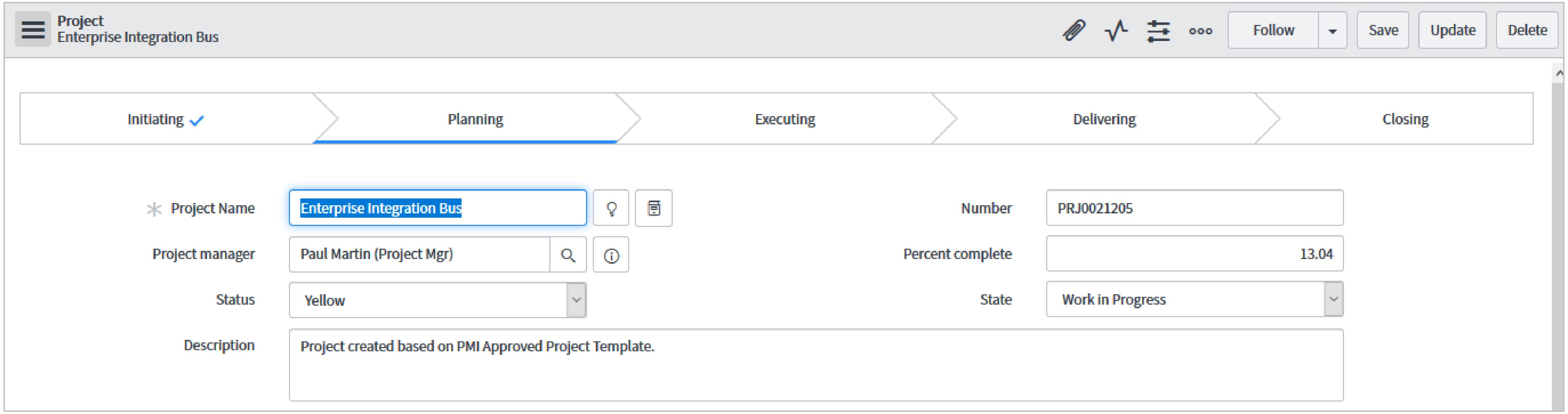


Project Member Allocation Details - Monthly (Hrs)

Month starts on	2018-02-01		2018-03-01		2018-04-01		2018-05-01	2018-06-01	2018
Parent category	Allocated	Actual	Allocated	Actual	Allocated	Actual	Allocated	Allocated	All
User									
Cathryn Nicolaus	160	64	176	176	168	120	184	168	
Jasmin Gum	160	64	176	176	168	120	184	168	
Lashawn Hasty	160	64	176	176	168	120	184	168	
Valeria Lingbeek	160	64	176	176	168	120	184	168	

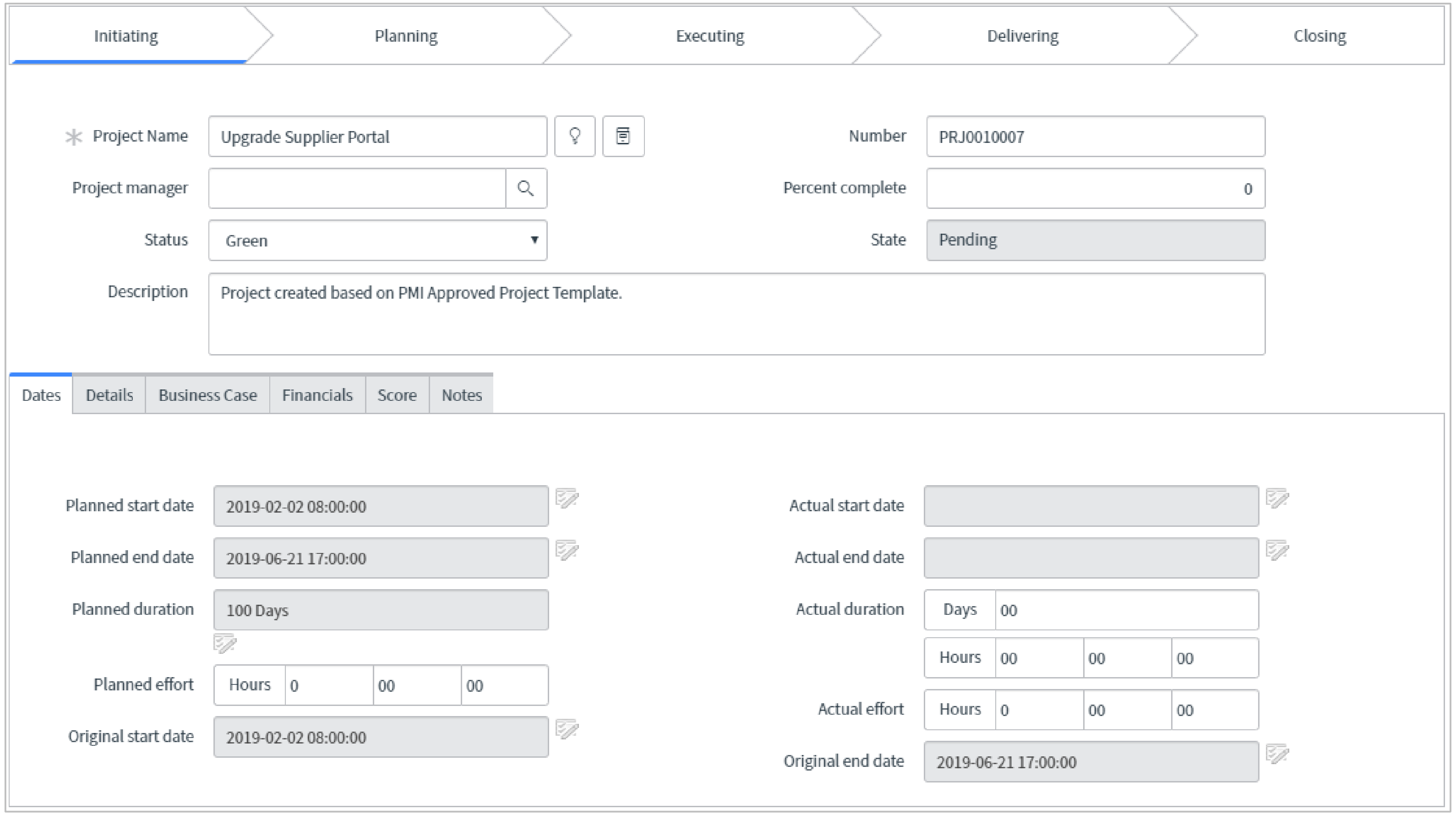
Project Workspace - Details

The **Details** tab opens the project form and enables you to define important aspects of the project.



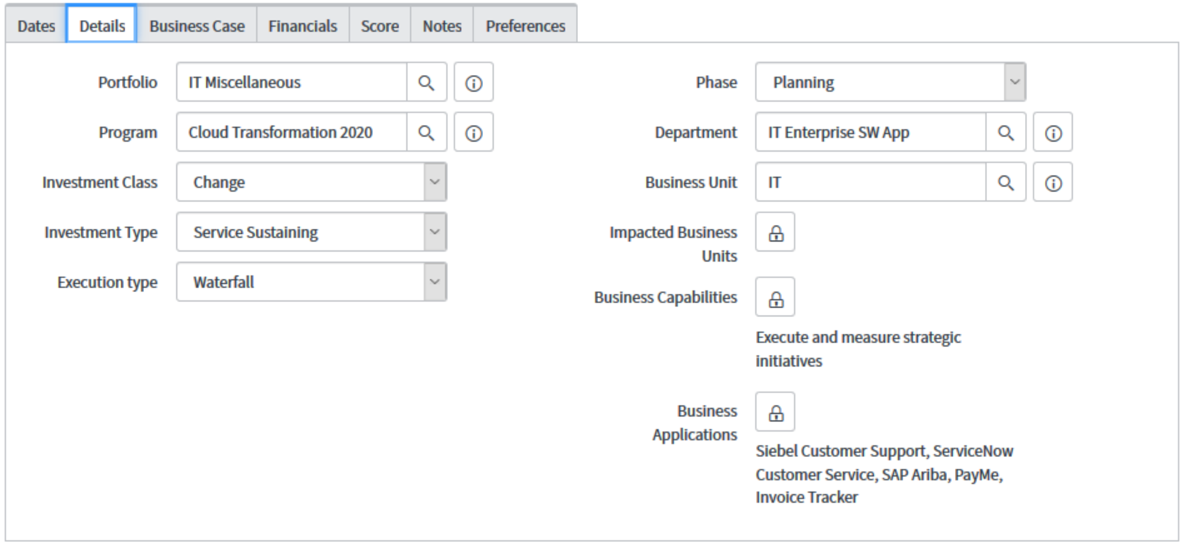
Project Form – Key Fields

- **Project Name** – The name of the project
- **Project Manager** – The project manager assigned to the project
- **Description** – A detailed description of the project
- **Number** – Auto-generated ID for the project. The color of the field changes based on the State
- **Percent Complete** – Percentage of work completed
- **State –** The current state of the project
- **Planned start date** – The intended date the project begins
- **Planned end date** – The intended date the project ends. Calculated after tasks are added

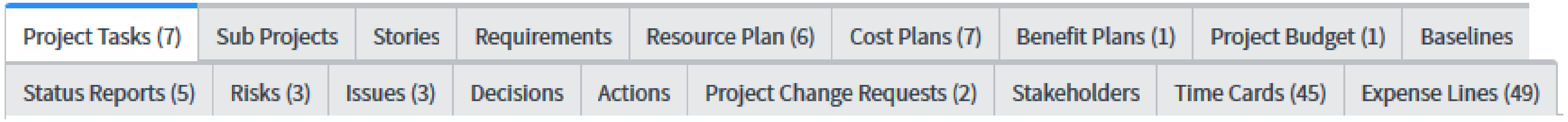


Project Form – Details Tab

- **Portfolio** – The primary portfolio of the project
- **Program** – The program to which the project belongs
- **Phase** – Project lifecycle phase
- **Percent Complete** – Percentage of work completed
- **Investment Class** – Type of investment class category assigned to the project
- **Investment Type** – Investment type of the project
- **Execution Type** – Execution methodology used to run the project: **Waterfall**, **Agile**, and **Hybrid**.
- **Business Capabilities** – If the project is to change, enhance, or add one or more business capabilities, they can be associated to the project. Business capabilities are defined in the *Application Portfolio Management* module.
- **Business Applications** – If the project is to change, enhance, or add one or more business applications, they can be associated to the project. Business applications are defined in the *Application Portfolio Management* module.



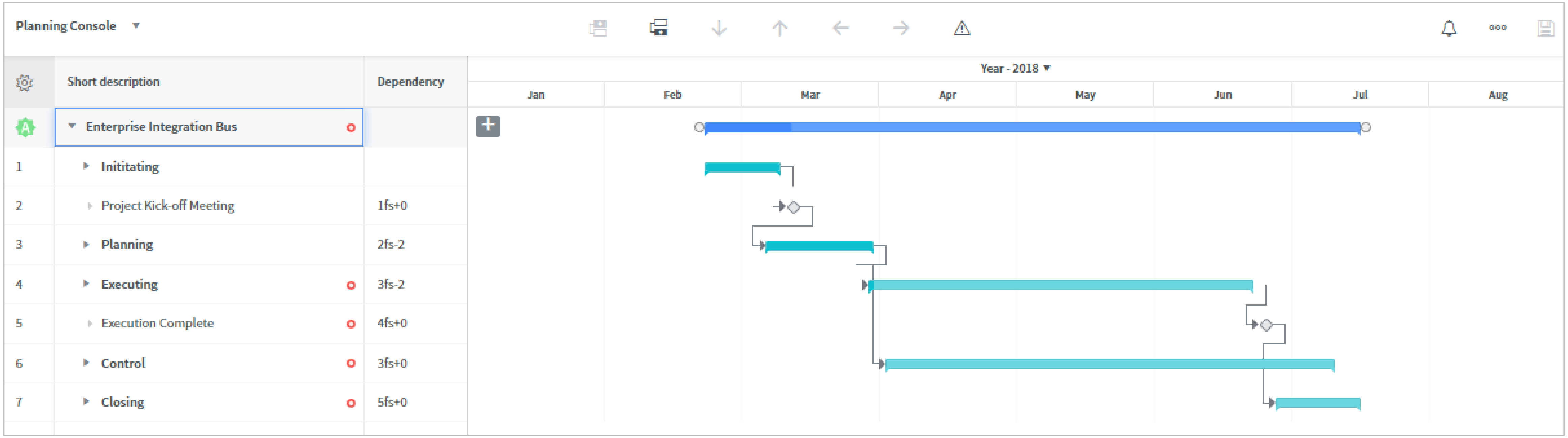
Project Form – Related Lists



- The **Project Tasks** list is contains all project tasks and milestones for the project.
- The **Sub Projects** tab allows you to add sub-projects to the current project for light rollup purposes.
- The **Stories** tab shows Agile 2.0 Stories attached to the project.
- The **Requirements** tab lists all Requirements associated with the project.
- This tab is a listing of all **Resource Plans** in all States against the Demand. New Resource Plans can be created from here.
- The **Cost Plans** tab shows all costs against the Demand, including costs from Resource Plans.
- The **Benefit Plans** related list shows the aggregated benefits for estimated and actual benefits for each fiscal period for the Demand.
- The **Project Budget** tab lists the budget by fiscal year as set within Portfolios, or the **Project Budget** Related Link.
- The **Baselines** lists all financial baseline information (snapshot of cost plan, benefit plan, and demand-level financial metrics) at a particular moment in time as set via the **Create Baselines** Related Link.
- RIDAC tabs can be used as log to capture **Risks, Issues, Decisions, Actions,** and **Project Change Requests.**
- The **Time Cards** tab displays all Time Cards posted against the project and project tasks.
- The **Expense Lines** tab contains all Expense Lines (Capex and Opex actual costs) that have hit the project.

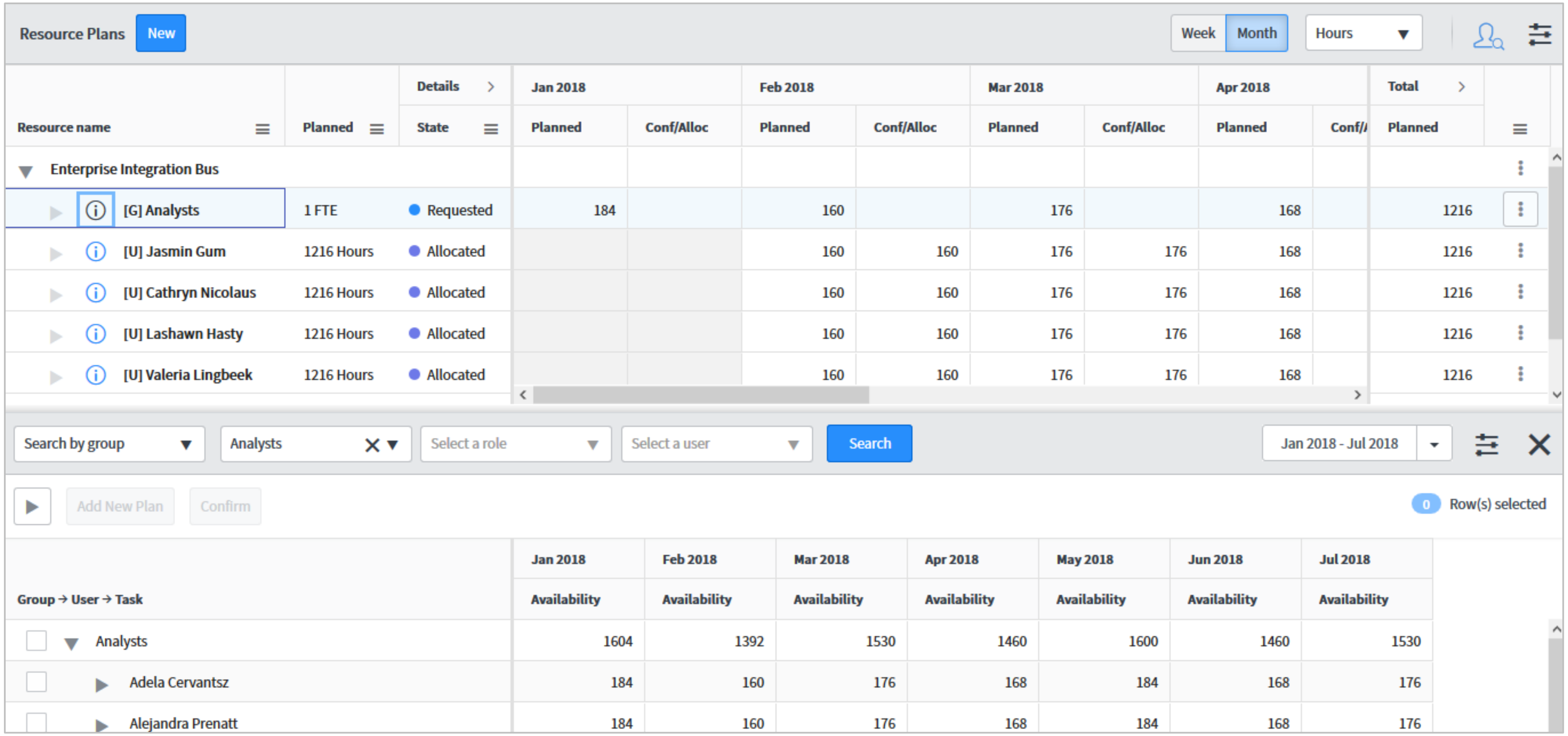
Project Workspace - Planning

The **Planning Console** gives project managers a comprehensive view of all aspects of a project, including a hierarchical list of sub-projects, if any, project tasks that appear in a work breakdown structure (WBS) list, and the project Gantt chart. The console also integrates with Live Feed so your users can collaborate on projects.



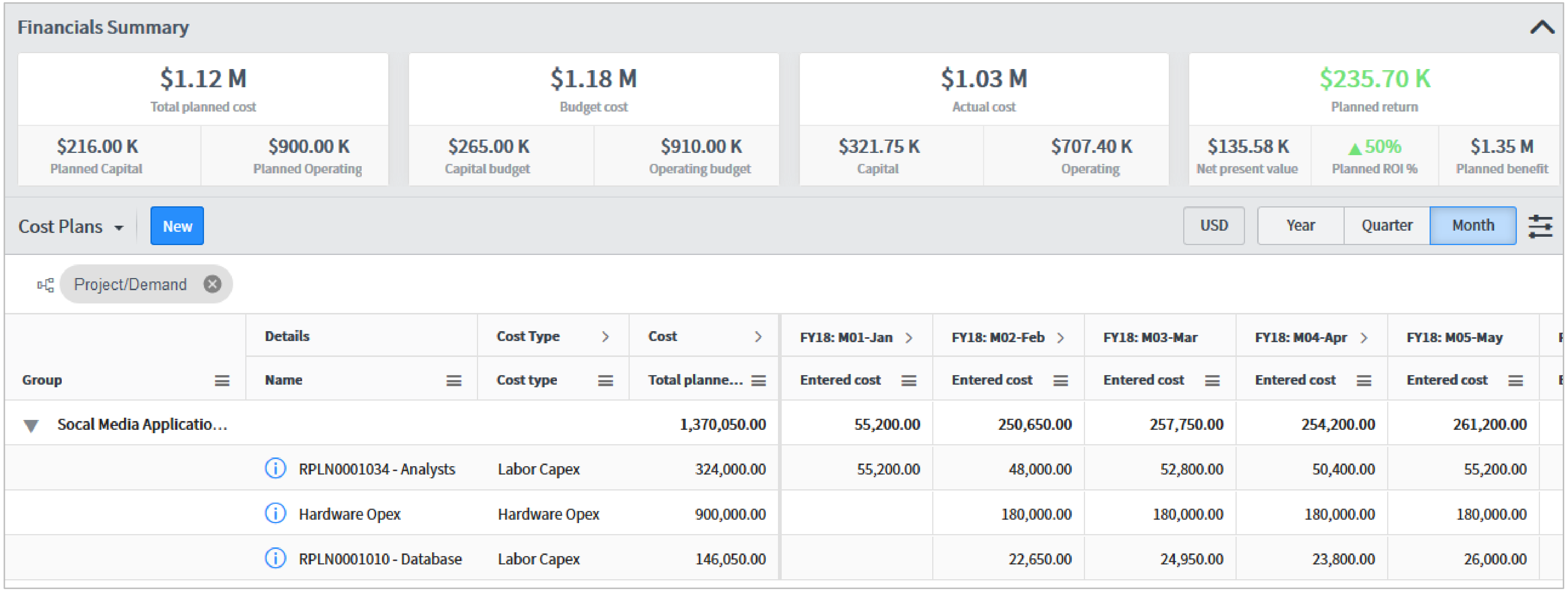
Project Workspace - Resource

As with the Allocation Workbench, The **Resources** tab enables you to find resources, and create and manage the resources plans for the project and project tasks. The tab is available only to a project manager.



Project Workspace - Financials

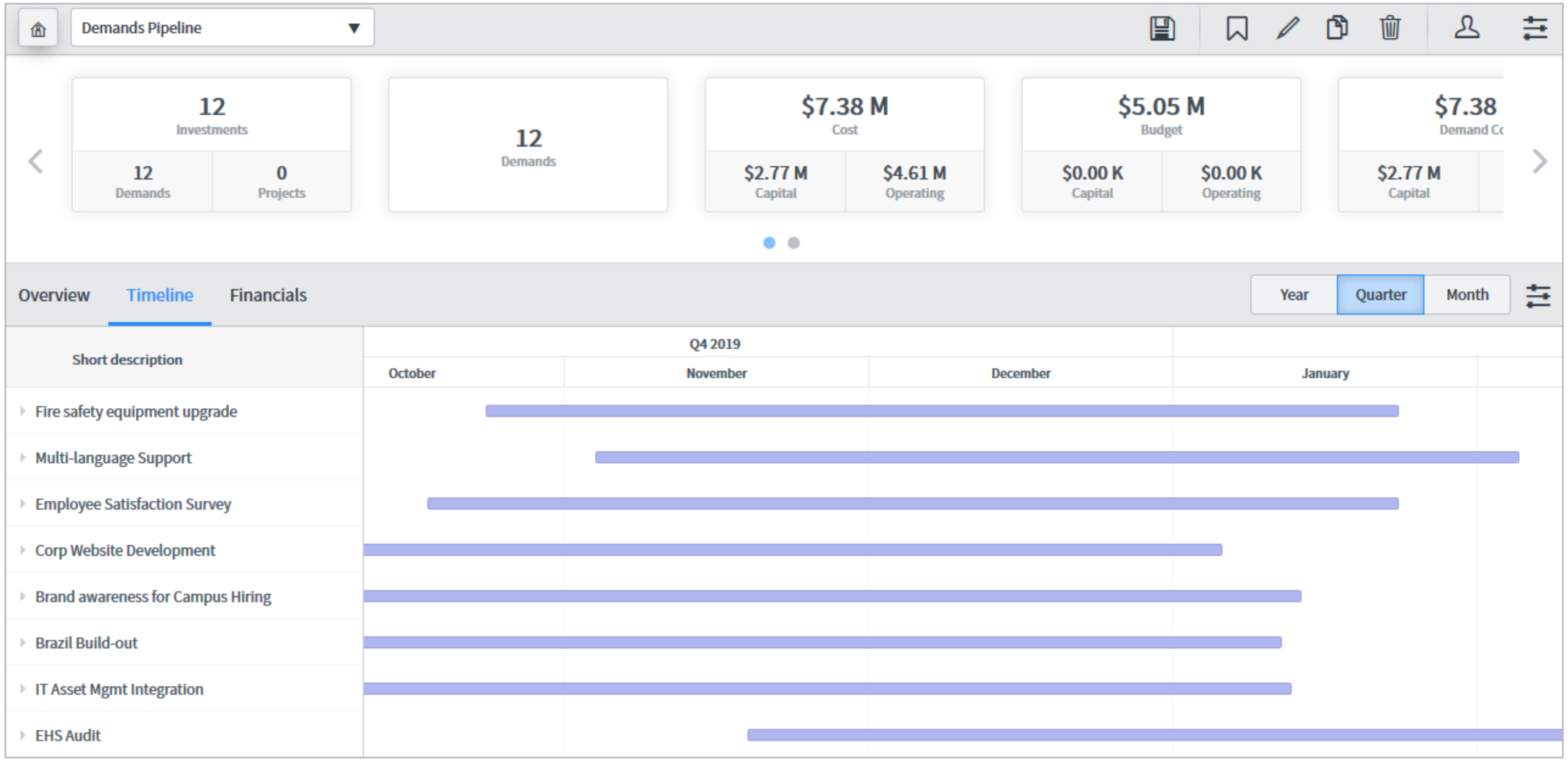
The **Financials** tab displays breakdowns of cost components of a project: planned cost, estimated returns, allocated budget, cost plans, and benefit plans. You can create baselines and compare baselines from this tab to track changes occurring during execution of project or demand.



Group	Details: Name	Cost Type: Cost type	Cost: Total planne...	FY18: M01-Jan: Entered cost	FY18: M02-Feb: Entered cost	FY18: M03-Mar: Entered cost	FY18: M04-Apr: Entered cost	FY18: M05-May: Entered cost
Socal Media Applicatio...			1,370,050.00	55,200.00	250,650.00	257,750.00	254,200.00	261,200.00
	RPLN0001034 - Analysts	Labor Capex	324,000.00	55,200.00	48,000.00	52,800.00	50,400.00	55,200.00
	Hardware Opex	Hardware Opex	900,000.00		180,000.00	180,000.00	180,000.00	180,000.00
	RPLN0001010 - Database	Labor Capex	146,050.00		22,650.00	24,950.00	23,800.00	26,000.00

Investment Portal

The **Investment Portal** gives you a comprehensive view of project and demand financials, deadlines, and other important metrics in an intuitive user interface that makes project and demand management more efficient.

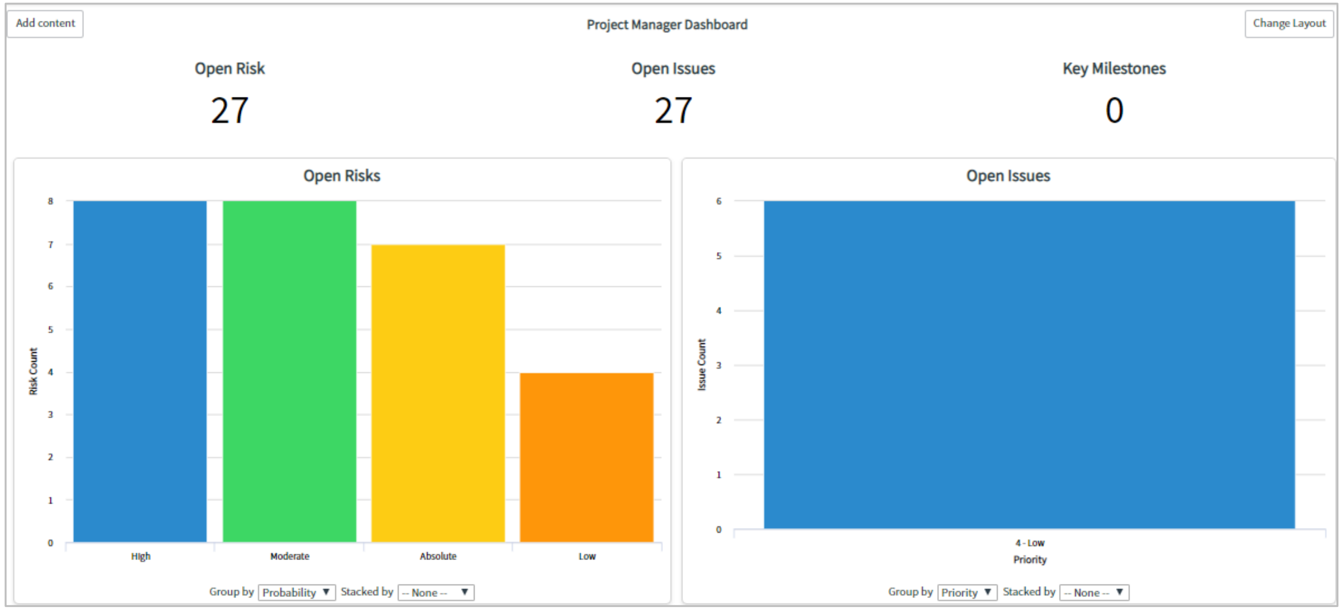


Project Manager Dashboard

The **Project Manager Dashboard** enables project managers to generate graphical project reports. The dashboard displays reports only for the projects managed by a project manager.

The dashboard tabs display the project-level reports and project financials reports.

- **Project** tab: Provides reports on open risks, open issues, key milestones, and unassigned project tasks that are late. It also provides information about the total number of open risks, open issues, and key milestones.
- **Project Financials** tab: Provides reports about project costs and budgets. It also provides information about the number of active projects and the number of programs.



Questions?

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Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- 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**

Let us know how we can improve!
Don't forget to fill out the class survey.

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