



*rego*University 2019

SAN DIEGO

Introduction to Ideas, Demands, and Projects

Your Guide: Mark Lundquist and Michelle Alexander

Introductions

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

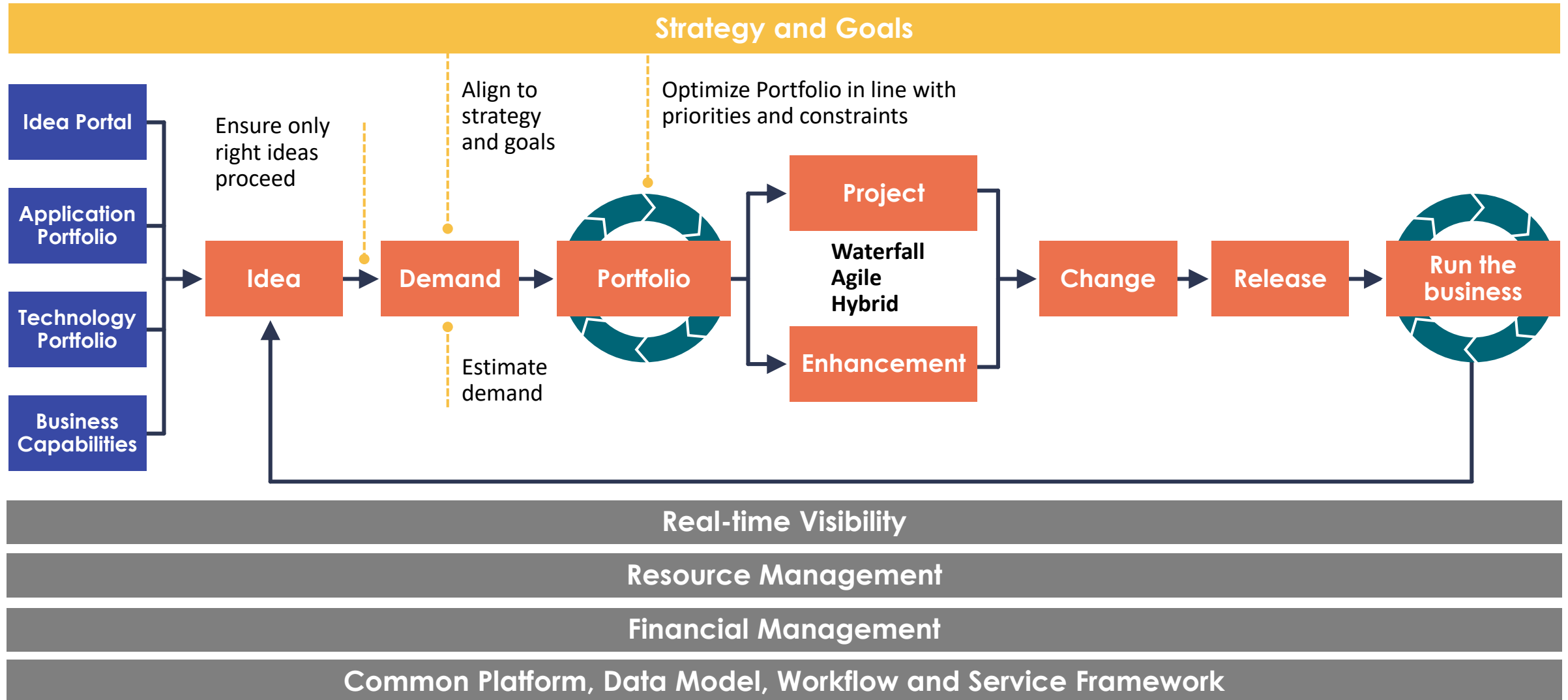


Agenda

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

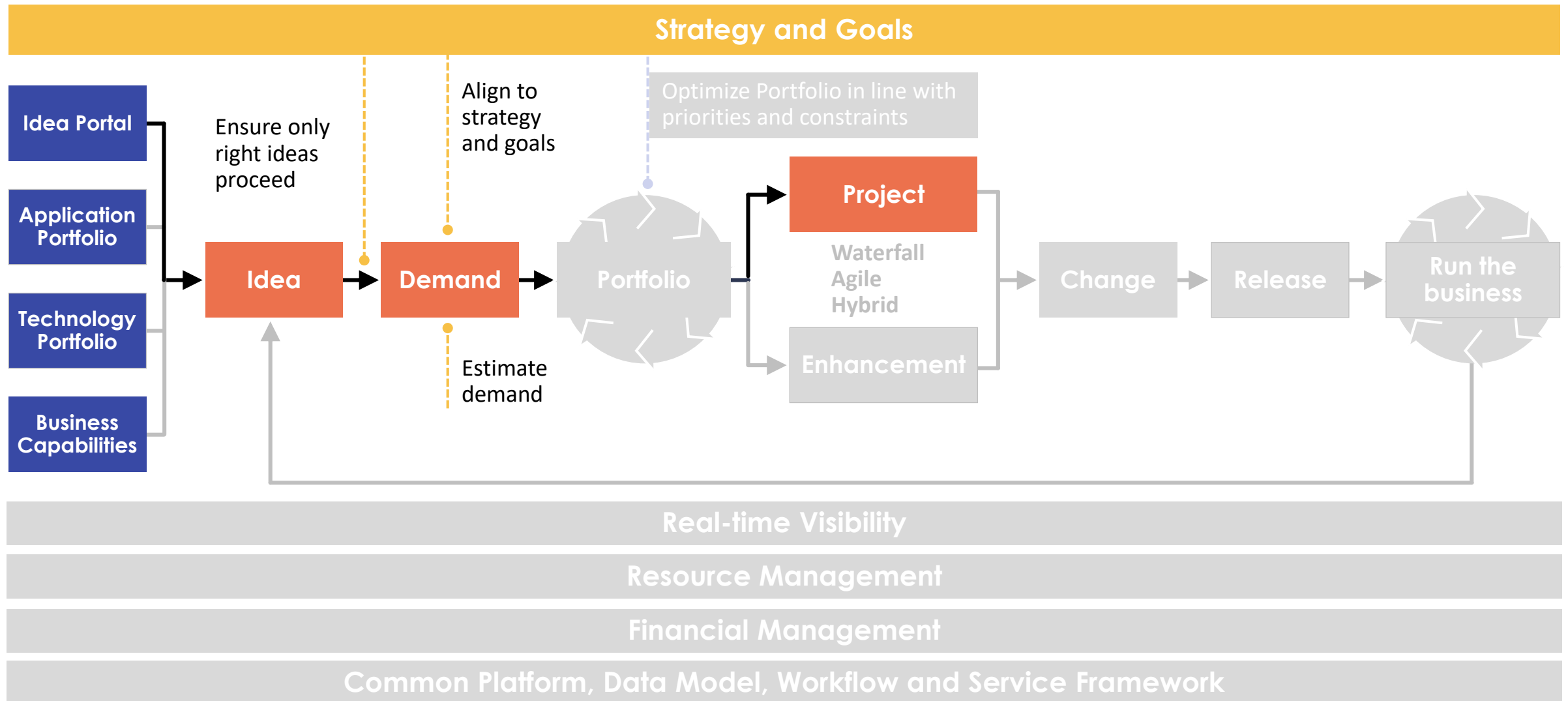
ServiceNow PPM Flow

4



Today's Focus

5



Demand Management - Ideas



Let Rego be your guide.

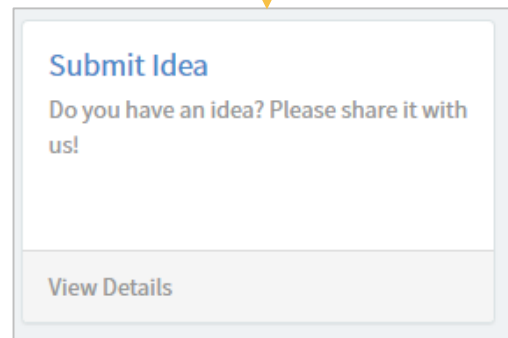
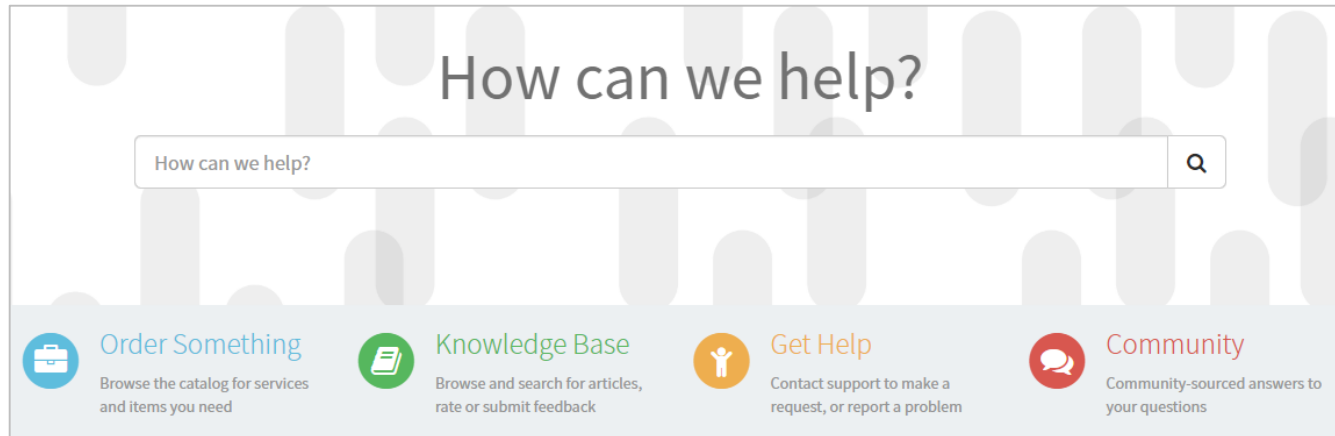
What Is an Idea?

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 than its value, will somebody be willing to financially back it?

Submitting a New Idea

Service Portal > Get Help > Submit Idea



The screenshot shows the 'Submit Idea' form. It has a title 'Submit Idea' and a subtitle 'Do you have an idea? Please share it with us!'. Below this is a paragraph of text: 'Take a few moments to briefly explain your idea. Upon receipt, your Demand Manager will review the request and contact you for next steps.' The form has two main input fields: '* Title' and 'Description'. The '* Title' field contains the text 'Mobile app for time card management'. The 'Description' field contains the text 'Create a new app for employees to claim their time while on-the-go. Needs to be available for iPhone, iPad and Android devices'. At the bottom right of the form, there is a link with a paperclip icon that says 'Add attachments'.

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



Let Rego be your guide.

Overview of Demand Management

Demand Management

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

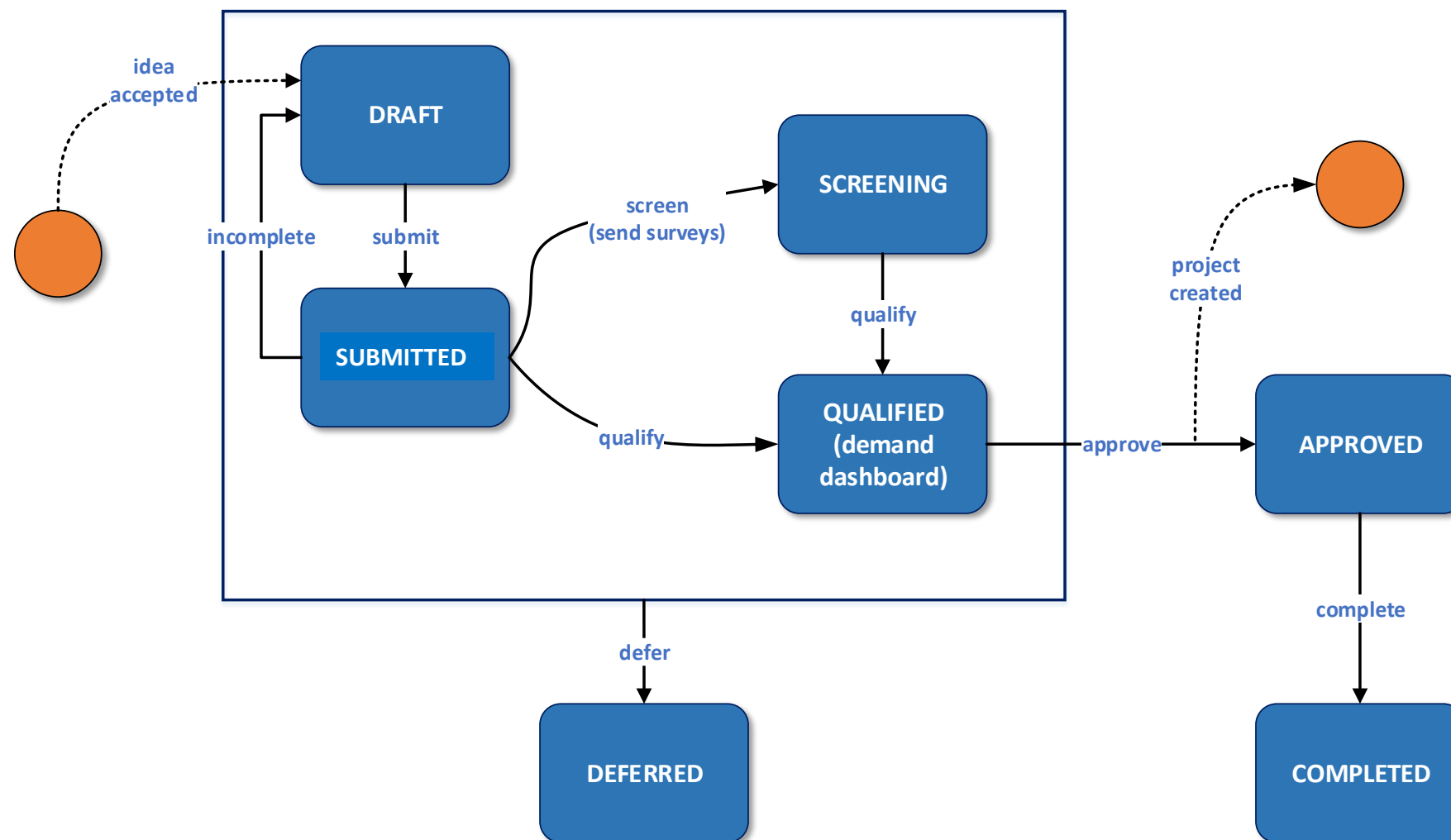
Roles

- **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.

The screenshot displays a web-based form for managing demands. At the top, a progress bar shows stages: Draft, Submitted, Screening, Qualified, Approved, and Completed. The form is divided into several sections:

- Top Section:** Contains fields for Name (Upgrade Wireless Access Points), Number (DMND0021358), Category (Strategic), Start date (2017-01-20), Type (Project), and Due date (2017-05-03).
- Project Section:** A field for Project (Upgrade Wireless Access Points).
- Tabs:** Details, Business Case, Financials, Assessment Data, and Notes.
- Details Section:**
 - Portfolio: IT Infra & Operations
 - Program: Cloud Transformation 2020
 - Submitted by: Jerrod Bennett
 - Demand manager: Kenya Bruni
 - Collaborators: (empty)
 - Idea: IDEA0021130
 - Department: Engineering
 - Business Unit: IT
 - Impacted Business Units: (empty)
 - Business Capabilities: (empty)
 - Business Applications: (empty)
- Bottom Section:** Buttons for Update, Save, and Delete.

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.

The screenshot displays a web-based form for creating a demand. At the top, a progress bar shows stages: Draft, Submitted, Screening, Qualified, Approved, and Completed. The form is divided into two main sections. The top section contains fields for Name, Category, Type, Project, Number, Start date, and Due date. The bottom section, titled 'Details', includes tabs for Business Case, Financials, Assessment Data, and Notes. It contains fields for Portfolio, Program, Submitted by, Demand manager, Collaborators, Idea, Department, Business Unit, Impacted Business Units, Business Capabilities, and Business Applications. At the bottom, there are buttons for Update, Save, and Delete.

Progress	
Draft	Submitted
Screening	Qualified
Approved	Completed

* Name	Upgrade Wireless Access Points	Number	DMND0021358
* Category	Strategic	Start date	2017-01-20
* Type	Project	Due date	2017-05-03
Project	Upgrade Wireless Access Points		

Details	
Portfolio	IT Infra & Operations
Program	Cloud Transformation 2020
Submitted by	Jerrold Bennett
Demand manager	Kenya Bruni
Collaborators	
Idea	IDEA0021130
Department	Engineering
Business Unit	IT
Impacted Business Units	
Business Capabilities	
Business Applications	

Update Save Delete

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.

Details	Business Case	Financials	Assessment Data	Notes
Impact	3 - Low		T-Shirt size	S - Small
Risk	8.57		Score	6.43
Value	8.86		Assessment Required	<input checked="" type="checkbox"/>

Demand Form – Related Lists

Stakeholders (3)	Requirements	Risks	Decisions	Resource Plans	Cost Plans	Benefit Plans	Demand Baselines	Demand Budget
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- 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.

The diagram illustrates the process of screening a demand. It starts with a 'Draft' state, moves to 'Submitted', and finally to 'Screening'. In the 'Screening' state, a 'Demand' card is shown with a green checkmark icon. The card displays the following information:

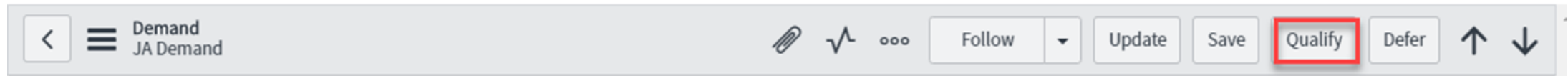
- Demand**
- Assigned to: Alfonso Griglen
- State: Ready to take
- Due Date: 2019-04-23
- Demand: Solar Field Installation
- Take Assessment button

An arrow points from the 'Take Assessment' button to the 'Assessment Data' tab of the 'Assessment Survey' form. The 'Assessment Survey' form has tabs for Details, Business Case, Financials, Assessment Data, and Notes. The 'Assessment Data' tab is active, showing the following fields:

Field	Value
Impact	3 - Low
Risk	4.2
Value	3.8
T-Shirt size	S - Small
Score	6.26
Assessment Required	<input checked="" type="checkbox"/>

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.

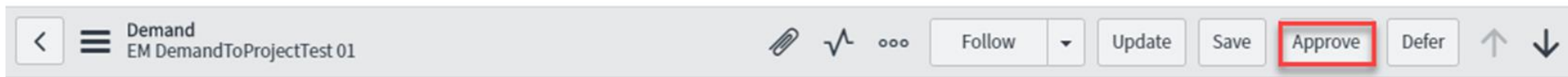
Demand Workbench

- 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



Let Rego be your guide.

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)

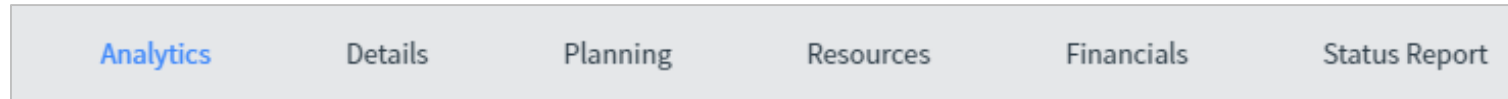
Project States



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.

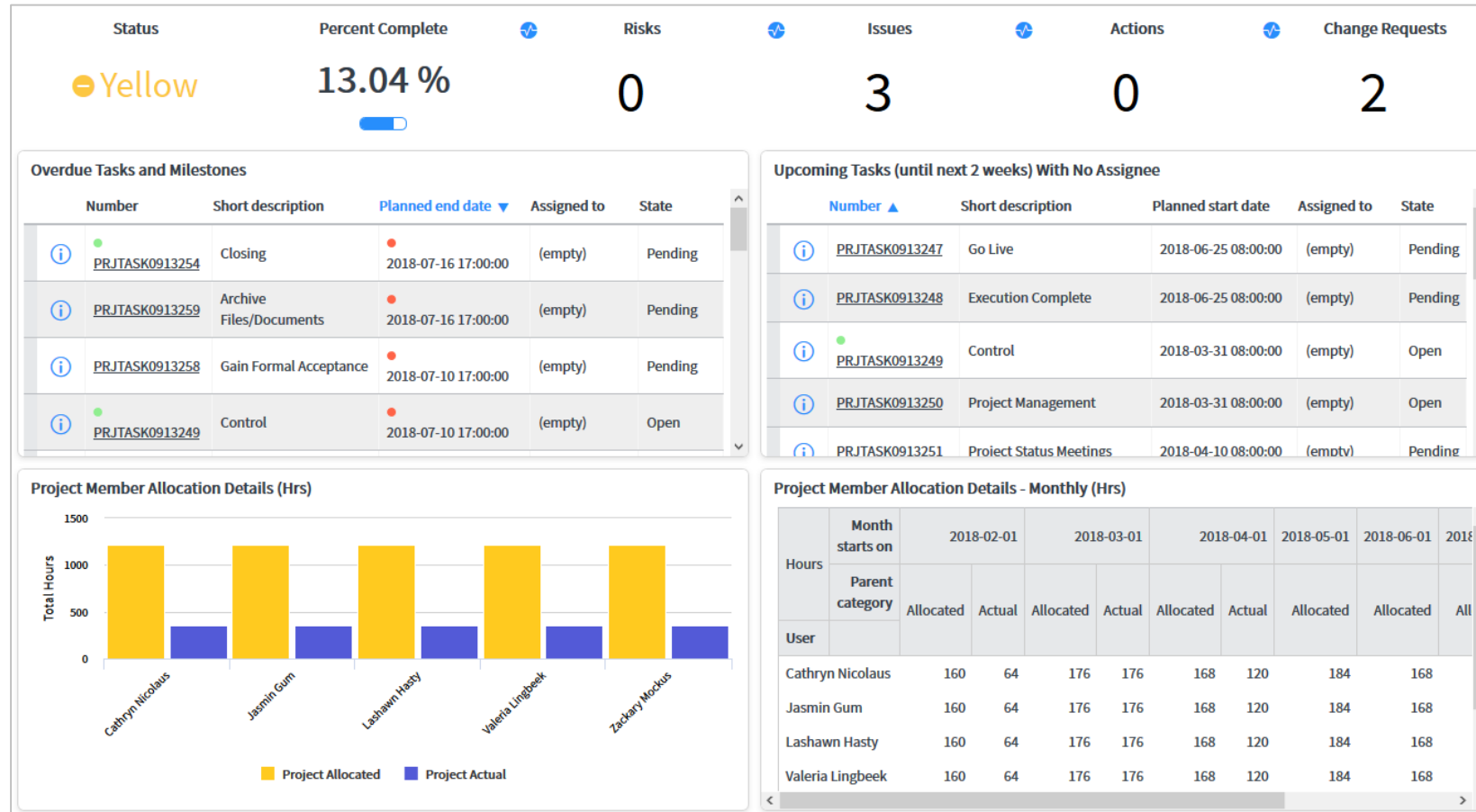


The project workspace comprises of the following tabs described at a high level:

- 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.

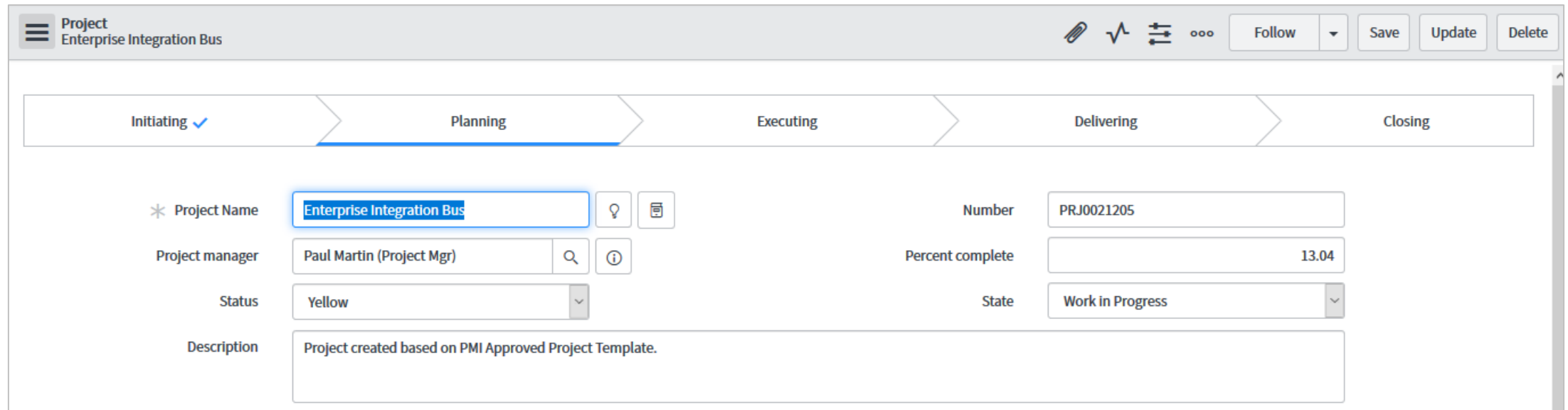
Project Workspace - Analytics

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



Project Workspace - Details

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



Project Enterprise Integration Bus

Follow Save Update Delete

Initiating ✓ Planning Executing Delivering Closing

* Project Name Enterprise Integration Bus

Project manager Paul Martin (Project Mgr)

Status Yellow

Description Project created based on PMI Approved Project Template.

Number PRJ0021205

Percent complete 13.04

State Work in Progress

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

The screenshot displays a project management form with a progress bar at the top indicating stages: Initiating (selected), Planning, Executing, Delivering, and Closing.

Project Details Section:

- Project Name:** Upgrade Supplier Portal
- Project manager:** (empty field with search icon)
- Status:** Green
- Description:** Project created based on PMI Approved Project Template.
- Number:** PRJ0010007
- Percent complete:** 0
- State:** Pending

Navigation Tabs: Dates, Details, Business Case, Financials, Score, Notes

Planned Dates and Effort:

- Planned start date:** 2019-02-02 08:00:00
- Planned end date:** 2019-06-21 17:00:00
- Planned duration:** 100 Days
- Planned effort:** Hours: 0, 00, 00
- Original start date:** 2019-02-02 08:00:00

Actual Dates and Effort:

- Actual start date:** (empty)
- Actual end date:** (empty)
- Actual duration:** Days: 00, Hours: 00, 00, 00
- Actual effort:** Hours: 0, 00, 00
- Original end date:** 2019-06-21 17:00:00

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.

The screenshot displays the 'Details' tab of a project form. The form is organized into two main columns of fields. The left column includes: Portfolio (IT Miscellaneous), Program (Cloud Transformation 2020), Investment Class (Change), Investment Type (Service Sustaining), and Execution type (Waterfall). The right column includes: Phase (Planning), Department (IT Enterprise SW App), Business Unit (IT), Impacted Business Units (empty), Business Capabilities (empty), and Business Applications (Siebel Customer Support, ServiceNow Customer Service, SAP Ariba, PayMe, Invoice Tracker). Each field has a search icon and an information icon. The 'Impacted Business Units', 'Business Capabilities', and 'Business Applications' fields also have a lock icon.

Field	Value
Portfolio	IT Miscellaneous
Program	Cloud Transformation 2020
Investment Class	Change
Investment Type	Service Sustaining
Execution type	Waterfall
Phase	Planning
Department	IT Enterprise SW App
Business Unit	IT
Impacted Business Units	
Business Capabilities	
Business Applications	Siebel Customer Support, ServiceNow Customer Service, SAP Ariba, PayMe, Invoice Tracker

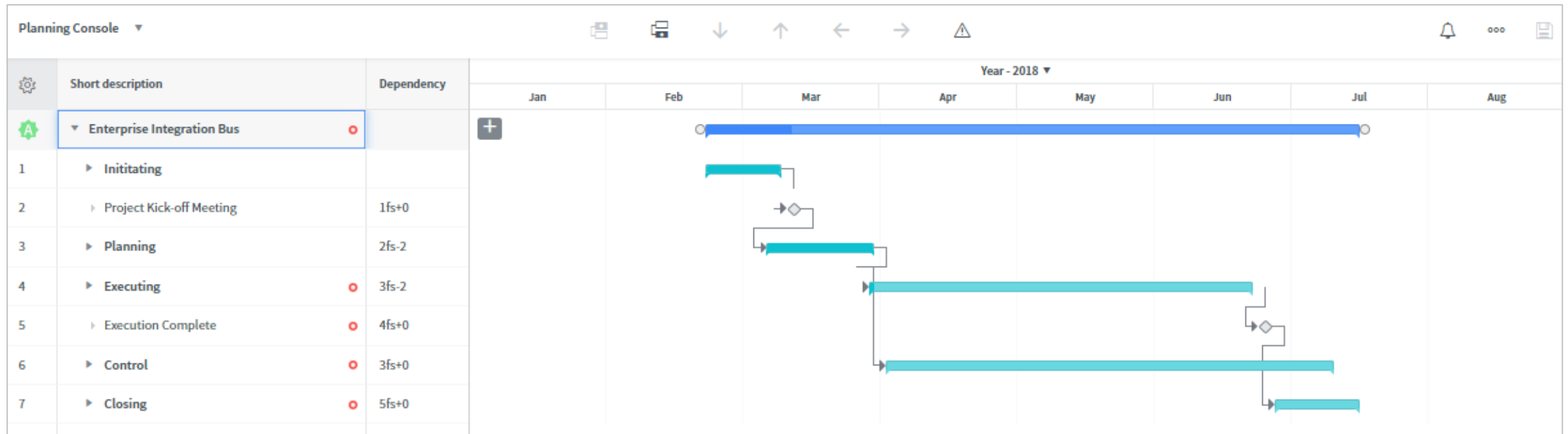
Project Form – Related Lists

Project Tasks (7)	Sub Projects	Stories	Requirements	Resource Plan (6)	Cost Plans (7)	Benefit Plans (1)	Project Budget (1)	Baselines
Status Reports (5)	Risks (3)	Issues (3)	Decisions	Actions	Project Change Requests (2)	Stakeholders	Time Cards (45)	Expense Lines (49)

- The **Project Tasks** list 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.

Resource Plans New												
			Week		Month		Hours					
			Jan 2018		Feb 2018		Mar 2018		Apr 2018		Total	
Resource name	Planned	State	Planned	Conf/Alloc	Planned	Conf/Alloc	Planned	Conf/Alloc	Planned	Conf/Alloc	Planned	
▼ Enterprise Integration Bus												
▶ [i] [G] Analysts	1 FTE	● Requested	184		160		176		168		1216	⋮
▶ [i] [U] Jasmin Gum	1216 Hours	● Allocated			160	160	176	176	168		1216	⋮
▶ [i] [U] Cathryn Nicolaus	1216 Hours	● Allocated			160	160	176	176	168		1216	⋮
▶ [i] [U] Lashawn Hasty	1216 Hours	● Allocated			160	160	176	176	168		1216	⋮
▶ [i] [U] Valeria Lingbeek	1216 Hours	● Allocated			160	160	176	176	168		1216	⋮
Search by group ▼ Analysts X ▼ Select a role ▼ Select a user ▼ Search Jan 2018 - Jul 2018												
▶ Add New Plan Confirm 0 Row(s) selected												
			Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018	Jun 2018	Jul 2018			
Group → User → Task			Availability	Availability	Availability	Availability	Availability	Availability	Availability			
<input type="checkbox"/> ▼ Analysts			1604	1392	1530	1460	1600	1460	1530			
<input type="checkbox"/> ▶ Adela Cervantsz			184	160	176	168	184	168	176			
<input type="checkbox"/> ▶ Alejandra Prenatt			184	160	176	168	184	168	176			

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.

Financials Summary

\$1.12 M

Total planned cost

\$216.00 K

Planned Capital

\$900.00 K

Planned Operating

\$1.18 M

Budget cost

\$265.00 K

Capital budget

\$910.00 K

Operating budget

\$1.03 M

Actual cost

\$321.75 K

Capital

\$707.40 K

Operating

\$235.70 K

Planned return

\$135.58 K

Net present value

▲ 50%

Planned ROI %

\$1.35 M

Planned benefit

Cost Plans

New

USD

Year

Quarter

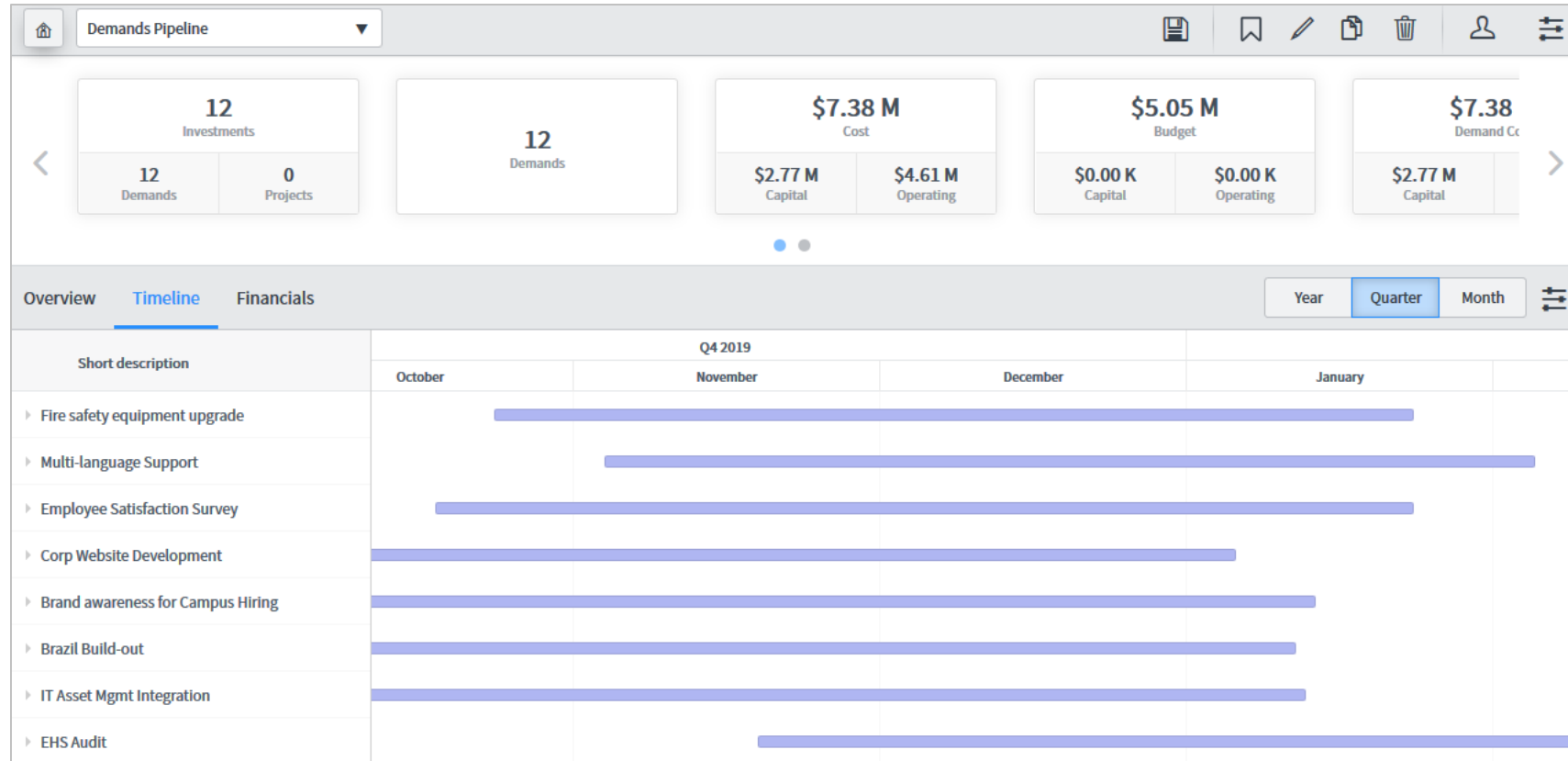
Month

Project/Demand

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

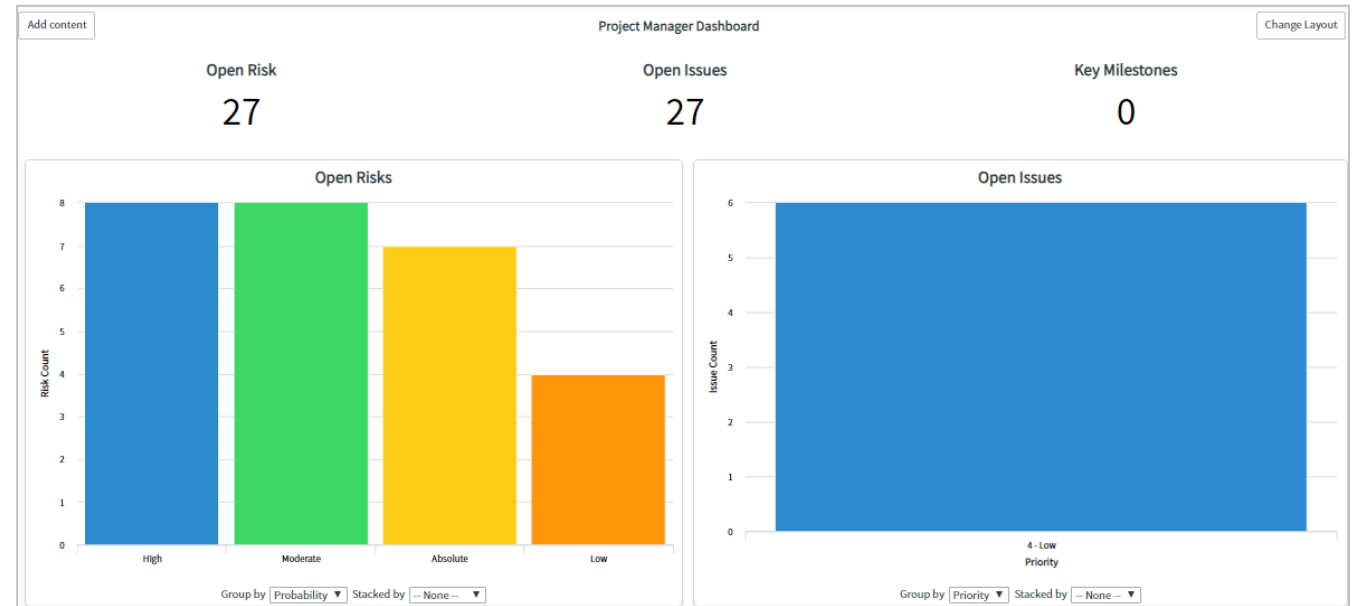


Project Manager Dashboard

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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Thank You For Attending regoUniversity

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.



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com