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SAN DIEGO

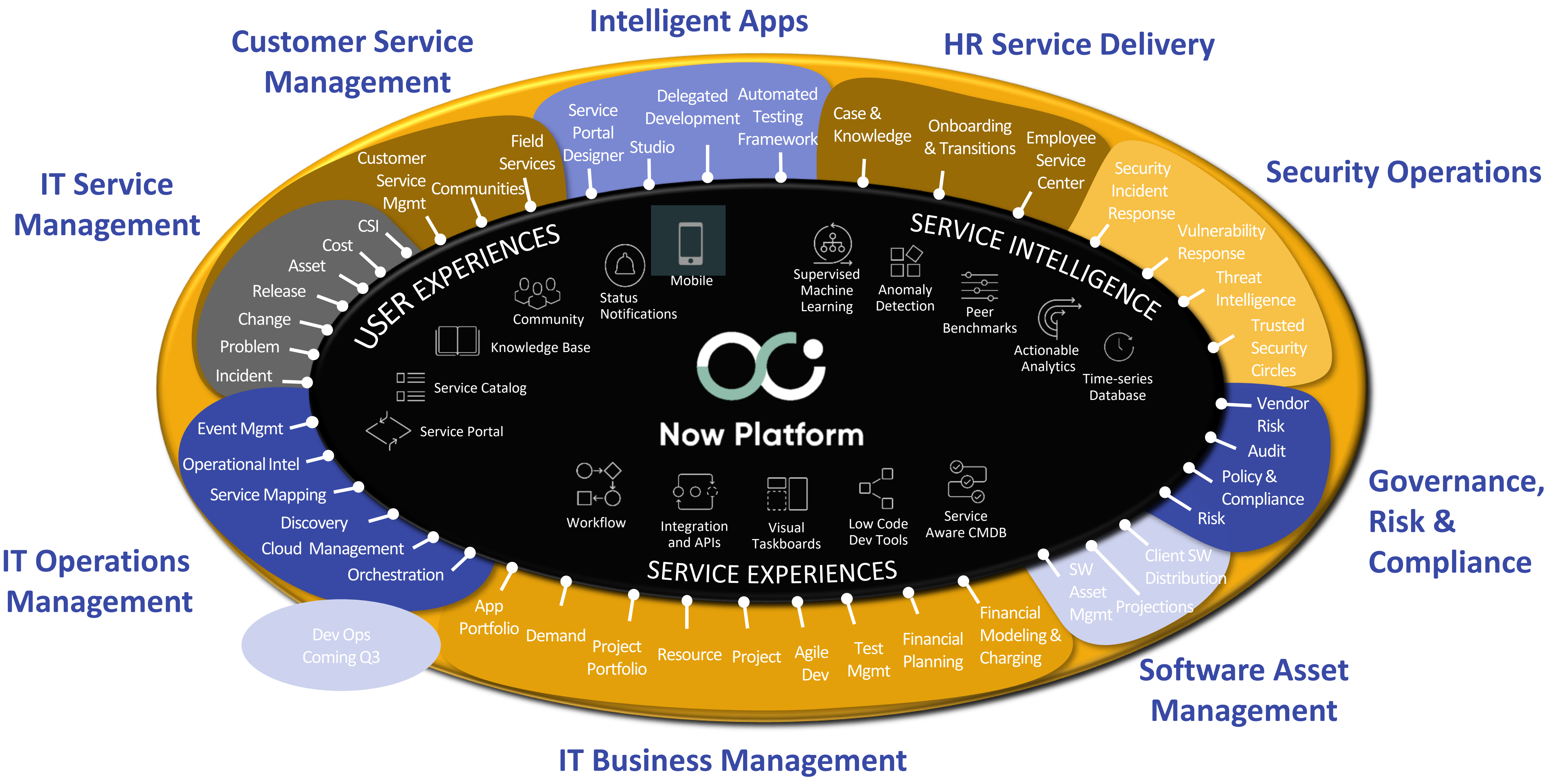
Latest ServiceNow Release | Value Overview

Your Guide: Jerry Dolak and Jen Scarlato

Introductions

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

ServiceNow Platform Capabilities



Growth of ITBM Capabilities Across Releases

Investments and Why Upgrade

Istanbul

PPM
- Portfolio Planning/ Forecasting
- Enhanced Resource WB
- Automated Time Sheets
- Project Status Reporting
- Project Change Request

Agile
Agile 1.0

APM
- Initial APM release

January 2017

Jakarta

PPM
- Portfolio Scoring and Ranking
- Project Preferences
- Benefits Plans
- Worker Portal

Agile
- SCRUM

APM
- ITOM Service Mapping integration

July 2017

Kingston

PPM
- Portfolio Inter-project dependencies
- BU/Strategy/Goals
- Resource Plan Extend
- Project Admin Role
- Project Manager Landing Page

Agile
Agile 2.0 release

APM
- NEW Technology Portfolio Management UI

January 2018

London

PPM
- Investment Portal
- Grid UI Resource, Cost & Benefit Plans
- Resource Allocation Workbench

Agile
- Essential SAFe

APM
- Auto-numbering capability hierarchy
- Pre-configured Data Integrity Checks
- Pre-configured Data certification

September 2018

Madrid

PPM
- PPM Dashboards
- Rate Model
- Financial Baseline compare

Agile
- Essential SAFe
- Portfolio SAFe

APM
- Technology Portfolio Management Enhancements
- Application Roadmap

March 2019

New York

PPM
- Investment Funding
- Innovation Portal
- Demand Task

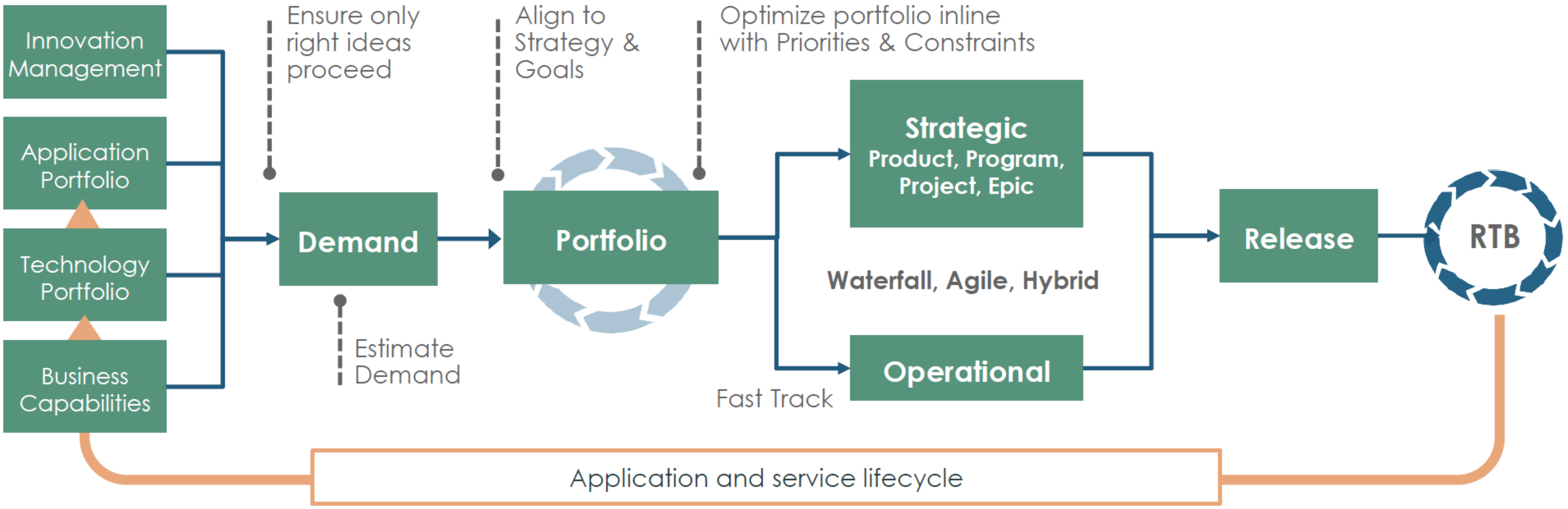
Agile
- Agile Development 2.0 and PPM integration

APM
- Information Portfolio Mgmt.- GRC

Investment Funding:
- Bottoms-up funding requests
- Top-down funding allocation
- Multiple funding sources

September 2019

ITBM on a Single Platform

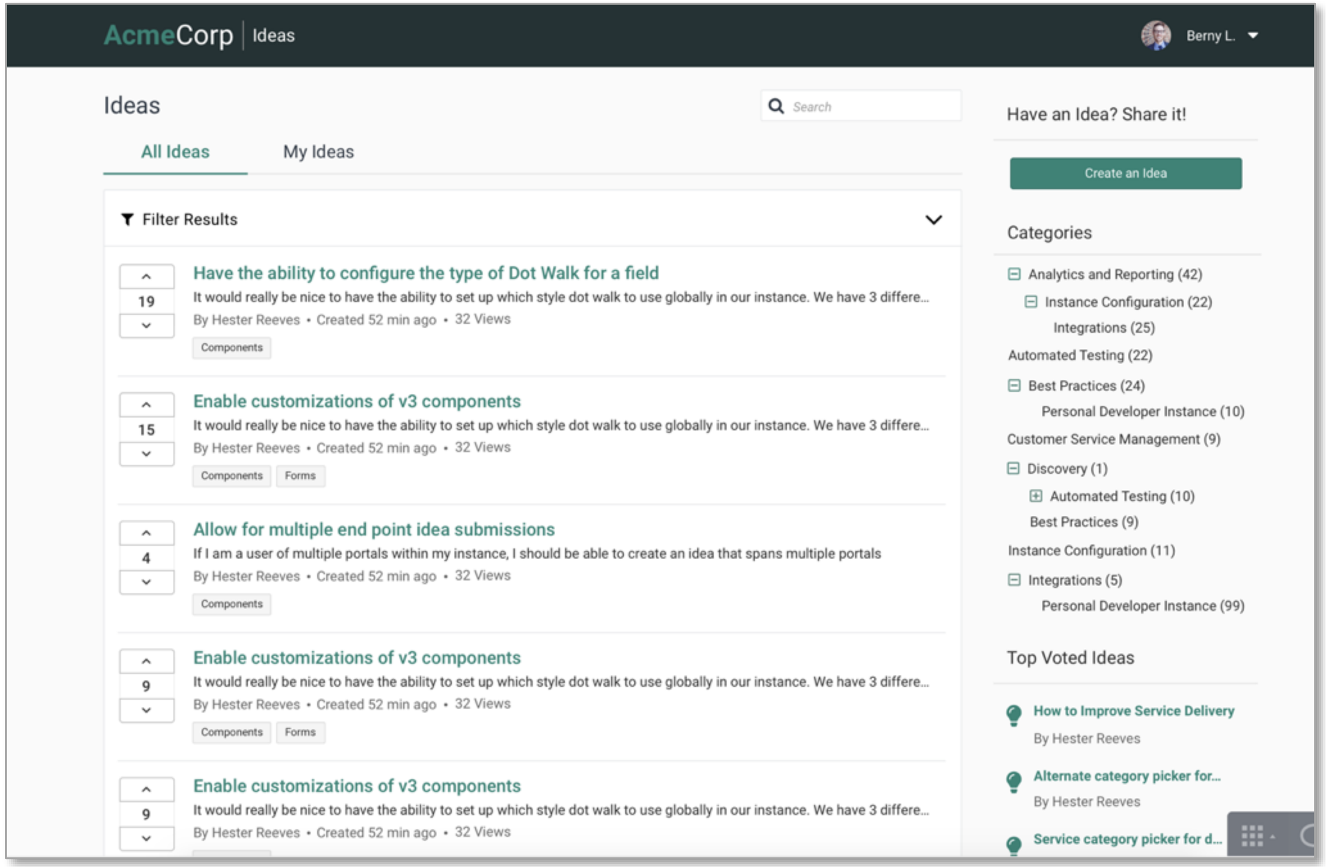


Project Portfolio Management

What's New – Idea Management

Innovation Management

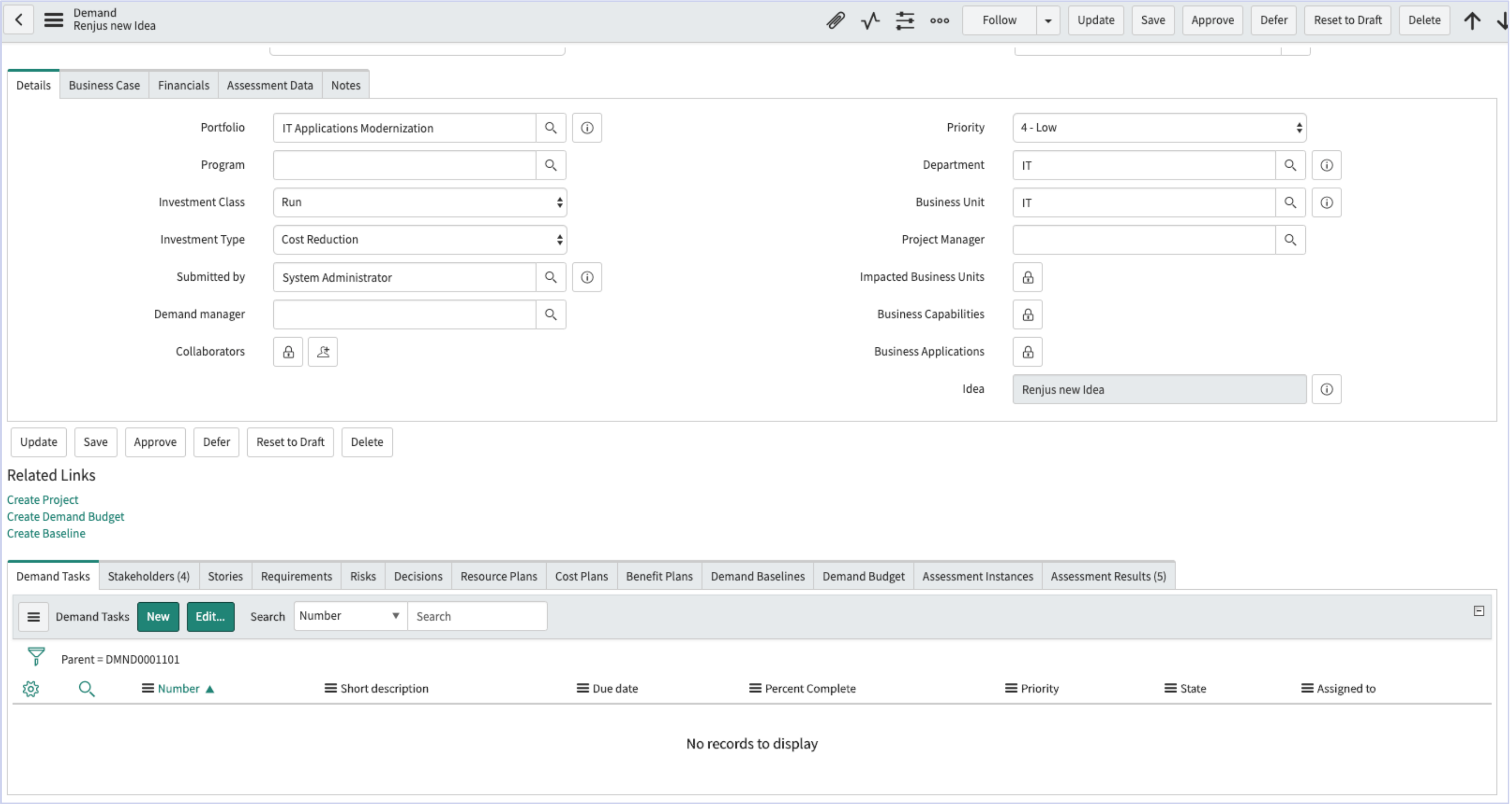
- Submit ideas, vote up/down, collaborate & comment
- Centralize source for ideas in the organization
- Browse through top voted ideas
- Provide a pipeline of vetted ideas
- View status as idea progresses to a demand or an enhancement



What's New – Demand Management

Demand Management – Demand Task

- Create a demand task and assign a resource or group to delegate cost, effort, risk, and benefit planning activities for a demand
- View the actual cost and effort for the demand tasks once resources log timecards for the assigned activities



Demand Management continued..

Demand form enhancements

  - Pre-assign a user in a demand to be the project manager when the demand is converted to a project in future
  - View the actual cost and time spent by resources working on a demand or demand task using the Demand Actual Cost and Demand Actual Effort fields

- Converting a demand to a project automatically creates a financial baseline for both the demand and the converted project
  - As a demand manager, use the baseline data to track the cost plan, benefit plan, and funding data of the demand at the time of conversion
  - As a project manager, use this baseline to compare and review the variance as the project progress
- Configure new widgets to show the demand financial data in the Financials Summary section on the Demand Financials page

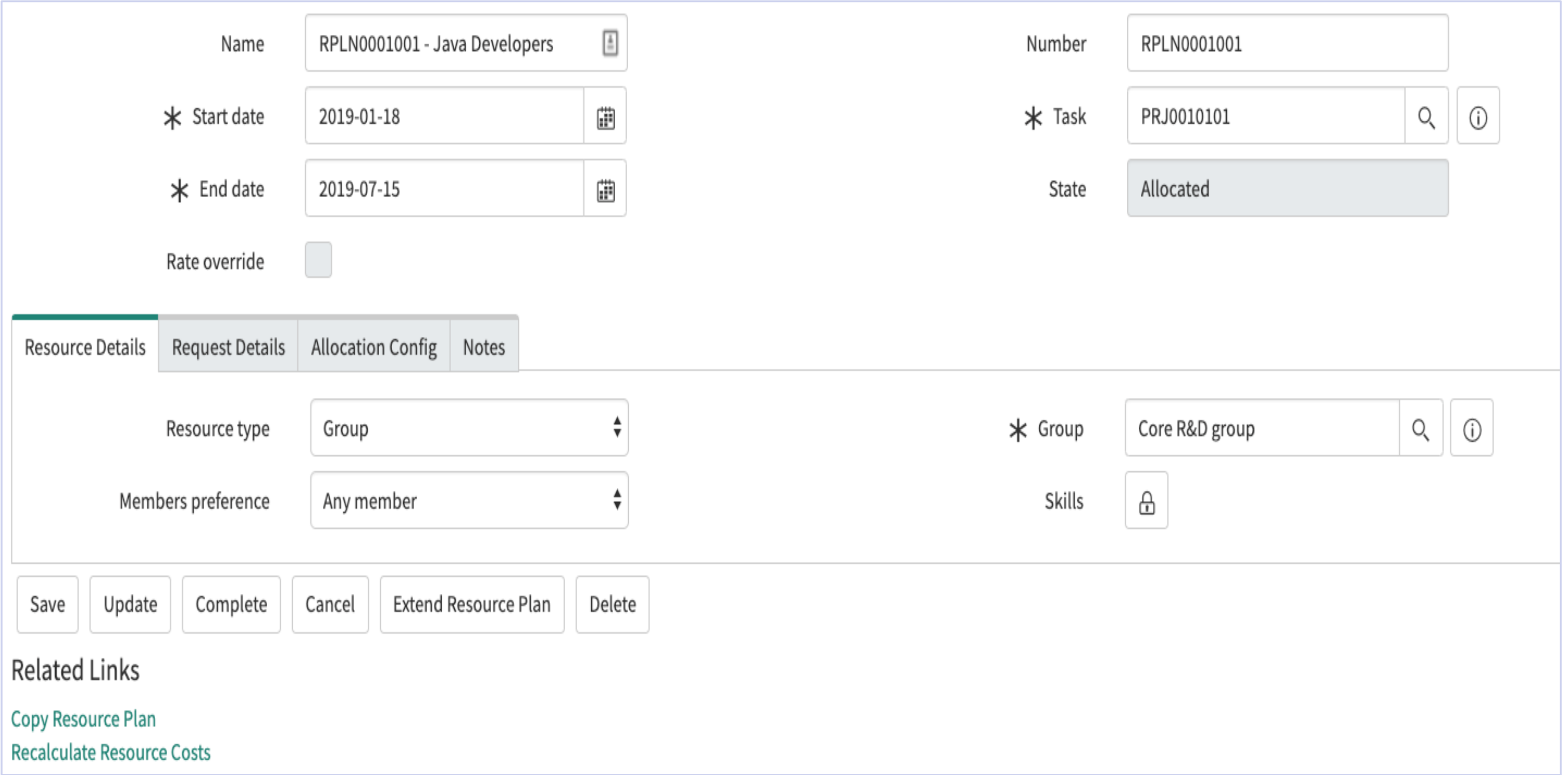
What’s New - Project Management

- Restrict the level of access of your users with a read-only role that enables them only to view data in certain tables, dashboards, and reports
- Users with the Business stakeholder role can also approve demands and timecards
- Configure new widgets to show the project financial data in the Financials Summary section on the Financials tab in the Project Workspace

What's New - Resource Management

Recalculate cost of a resource plan

- Recalculate costs of a resource plan when hourly rates change in the associated rate model to keep the costs up to date
- Recalculate costs of a single resource plan of a project or demand
- Recalculate the costs of all resource plans of a project or demand



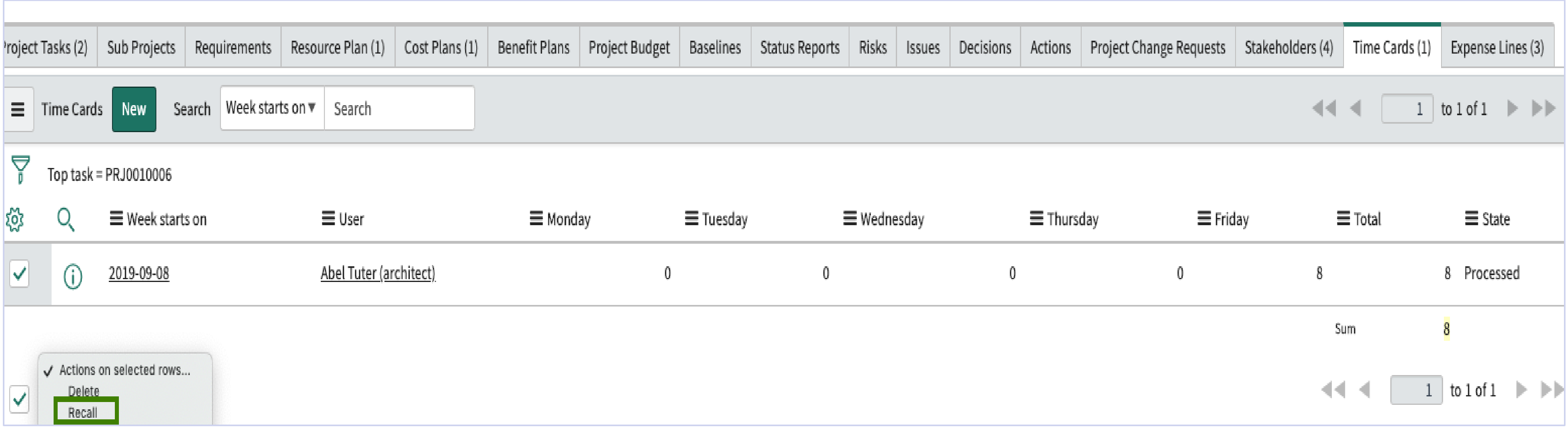
Resource Management continued..

Resource Allocation Workbench enhancements

- Identify over-allocated resources by noting whether the over-allocation icon is shown in the Resource Finder next to a resource name
    - This icon indicator means you don't have to scroll through all allocation periods
- Filter projects and demands by group, role, or user in the resource grid to view specific resource allocations
- Manage resource plans directly from the resource grid without having to open the form view
- You can perform the following actions on a resource plan:
    - Modify a confirmed and requested resource plan
    - Allocate a resource for all updated periods for a confirmed or partially allocated group resource plan
    - Request extension of an allocated resource plan
    - Complete and close a resource plan after all its associated tasks and projects are complete
    - Cancel a resource plan when it is no longer required
    - Override the hourly rate returned by the rate model or the labor rate card for a resource plan using the Rate override and Resource rate fields in the Resource Plan form
    - Assign users to the Business Stakeholder role to provide read-only access to resource records and to view resource information and reports

What's New – Time card

Recall a processed time sheet or a timecard

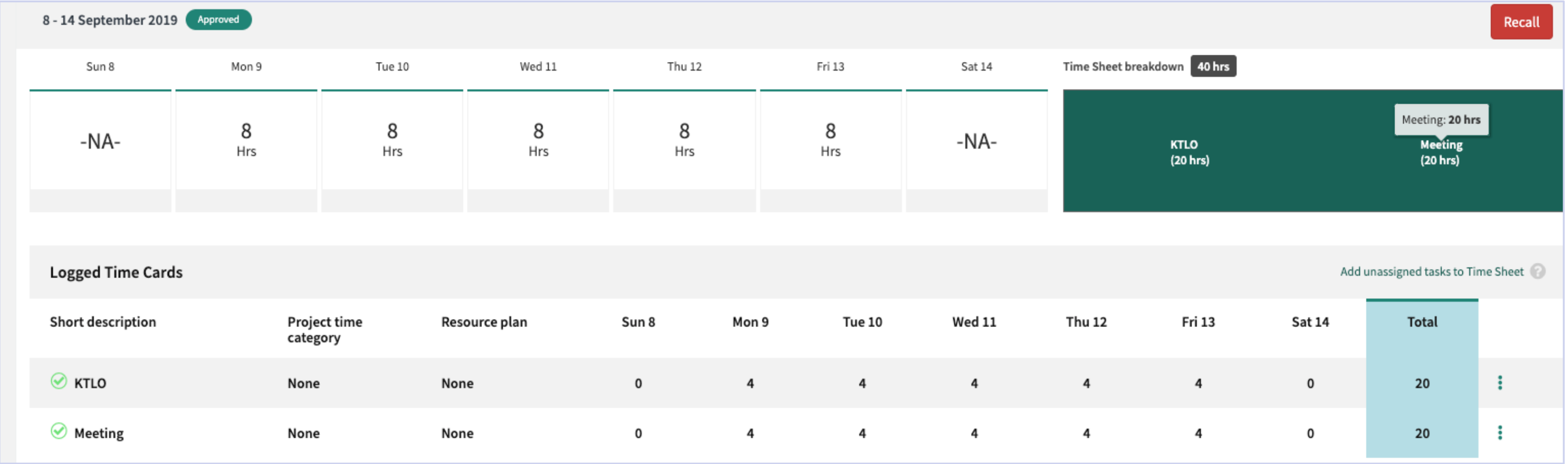


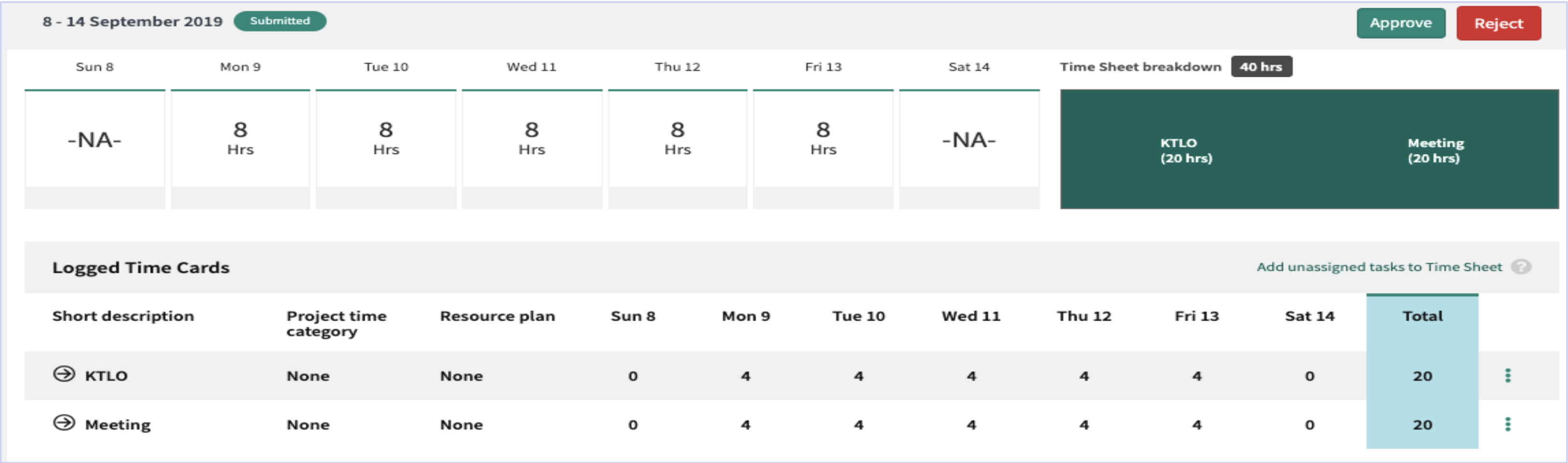
- Recall a time sheet or a timecard that you approved to return it to the submitter for corrections
- The submitter can then make any required changes and resubmit the time sheet

Time card continued..

Timesheet Portal Enhancements

- Submit, approve, reject, or recall a time card directly from the Time Sheet Portal without having to open the form view
- Open the time sheet in the form view from the Time Sheet Portal using the time sheet form view icon
- Log your time against a specific resource plan in a task with multiple resource plans
- View notifications for the submitted and recalled time cards in the notification area





Time card continued..

Time Sheet Dashboard

- Track time sheet activities and reports with the Time Sheet Dashboard
- This dashboard is included in the Performance Analytics – Content Pack – Project Portfolio Suite with Financials (com.snc.pa.pmo_dashboards) plugin

Associate a task to a non-task-type category in a time card

- Associate a task to a time card of a non-task-type category such as meeting, KTLO, and admin activities
- This action generates expense lines for the task when the time card is processed

Delegate time sheet processing

- Delegate the processing of your resource time sheets for occasions when you might not have time to review them or may be unavailable
- Track the activities of a delegated time sheet in the Activities section of the Time Sheet form

Add more columns in the logged time card list on the Time Sheet Portal

- Add columns in the logged time card list on the Time Sheet Portal to show additional information that you might require to log your time cards

Generate time card reports by day

- Generate a time card report by days for any period, irrespective of the time sheet week that the time cards belong to

Other Changes..

Mobile app for Project Status

- The Project Status app enables you to track status of your projects and collaborate with related stakeholders to resolve exceptions and take timely actions

Investment Portal

- Show or hide columns and widgets in an investment board that is shared with you
- Use the Export to Excel option to generate an Excel report of the investment board that is shared with you
- Sort data in the Timeline tab based on the planned start and end dates

Agile Development

What’s New - Agile Development

Personalized columns

- Personalize any list on the Agile Board. Configure and view only the columns important to you using the personalize list icon the list

Epic rollup

- View rollups and completion percentages as you define and complete work on the larger work items, epic, and feature

Task board

- Track the progress of your scrum tasks in horizontal lanes in the Task Board view

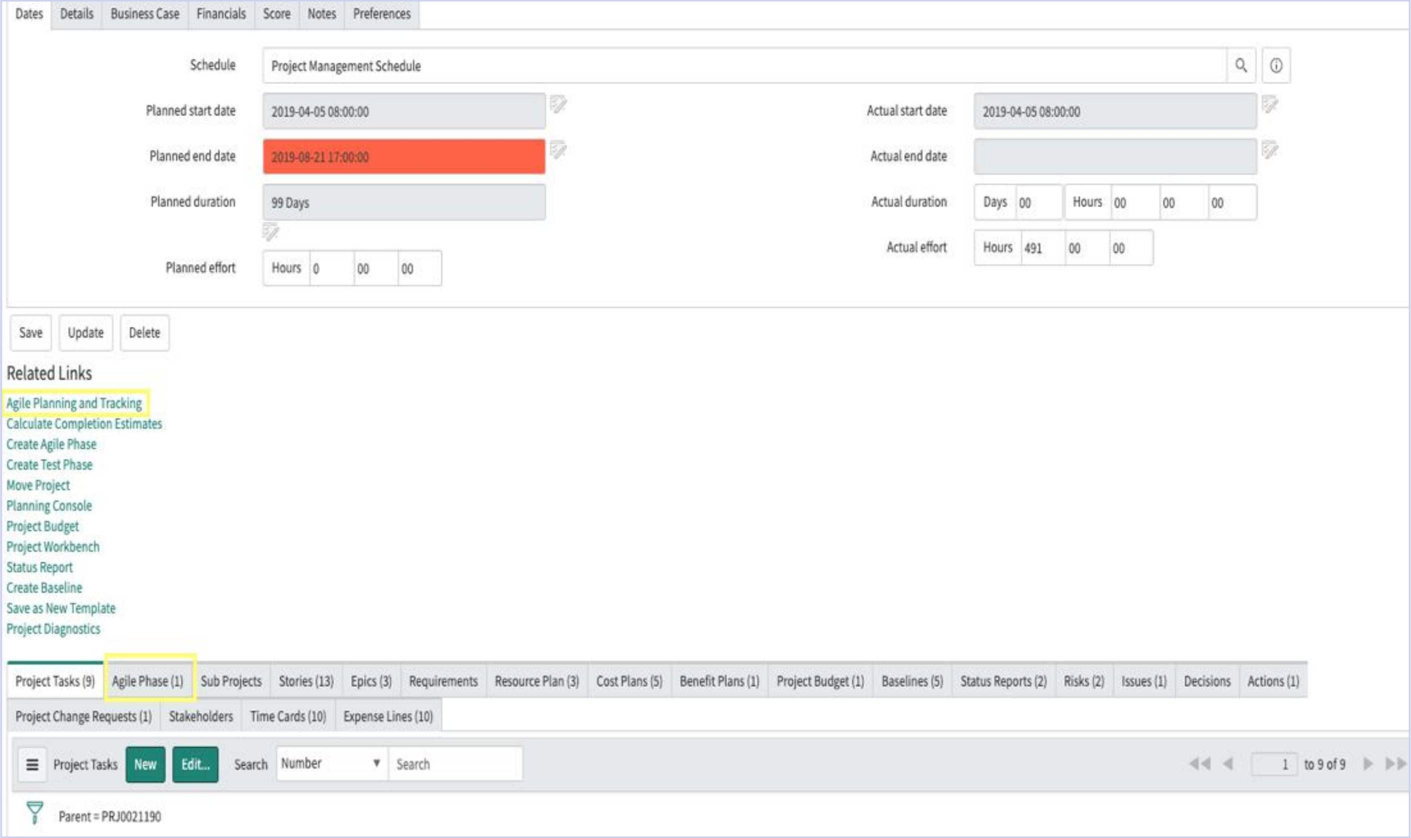
Performance Analytics Content Pack for Agile 2.0

- Performance Analytics Content Pack for Agile 2.0 contains preconfigured dashboards with data visualizations that help you improve your Agile processes and practices

Agile Development continued…

Agile Integration

- Add stories, epics, Agile, and waterfall phases to your Agile, Waterfall, and Hybrid projects
    - The value set in the Execution type field determines the related links and lists that appear for each project type
- Use the Agile Phase tab in a project to view details related to the agile phases for Agile and Hybrid projects
- Use the Agile Planning & Tracking related link in Agile and Hybrid projects to navigate to the team's backlog in the Agile board
- View a project summary using widgets and reports on the Analytics tab of the project workspace based on the project execution type (Waterfall, Hybrid, or Agile)
- Add new or existing stories to your project directly from the User Stories related list in the Project form



IT Financial Management

What’New - Financial Management

Financial Management For APM plugin

- Financial Management For APM (com.snc.financial_management_for_apm) plugin, which integrates with the Application Portfolio Management application. Use the preconfigured Business Application Costing cost model, its applicable metrics, and the associated dashboards that come with this plugin to assess the cost of your business applications

Financial Management For SPM plugin

- Financial Management For SPM (com.snc.financial_management_for_spm) plugin, which integrates with the Service Portfolio Management application
    - This integration provides you with a preconfigured Service Offering Costing cost model

Performance Analytics — Content Pack — Financial Management for Application Portfolio Management

- Performance Analytics — Content Pack — Financial Management for Application Portfolio Management (com.snc.pa.fm.apm) plugin
    - This plugin enables Performance Analytics dashboards for Financial Management associated with Application Portfolio Management

Expense allocation from the Cost Model form

- Allocate costs directly from the Cost Model form for a selected fiscal period
- The allocation engine follows the same process of cleansing, bucketing, and allocating as it does for expense allocation in the Financial Management workbench
- All the processes done in different stages of the Financial Management Workbench can be done with one click of the Allocate Expenses button in the Cost Model form

Read-only role for Financial Management

- Grant the read-only role to your users to restrict their level of access to dashboards
- Accessibility to the dashboards is limited to viewing reports of Financial Management for APM

Application Portfolio Management

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What's New - Application Portfolio Management

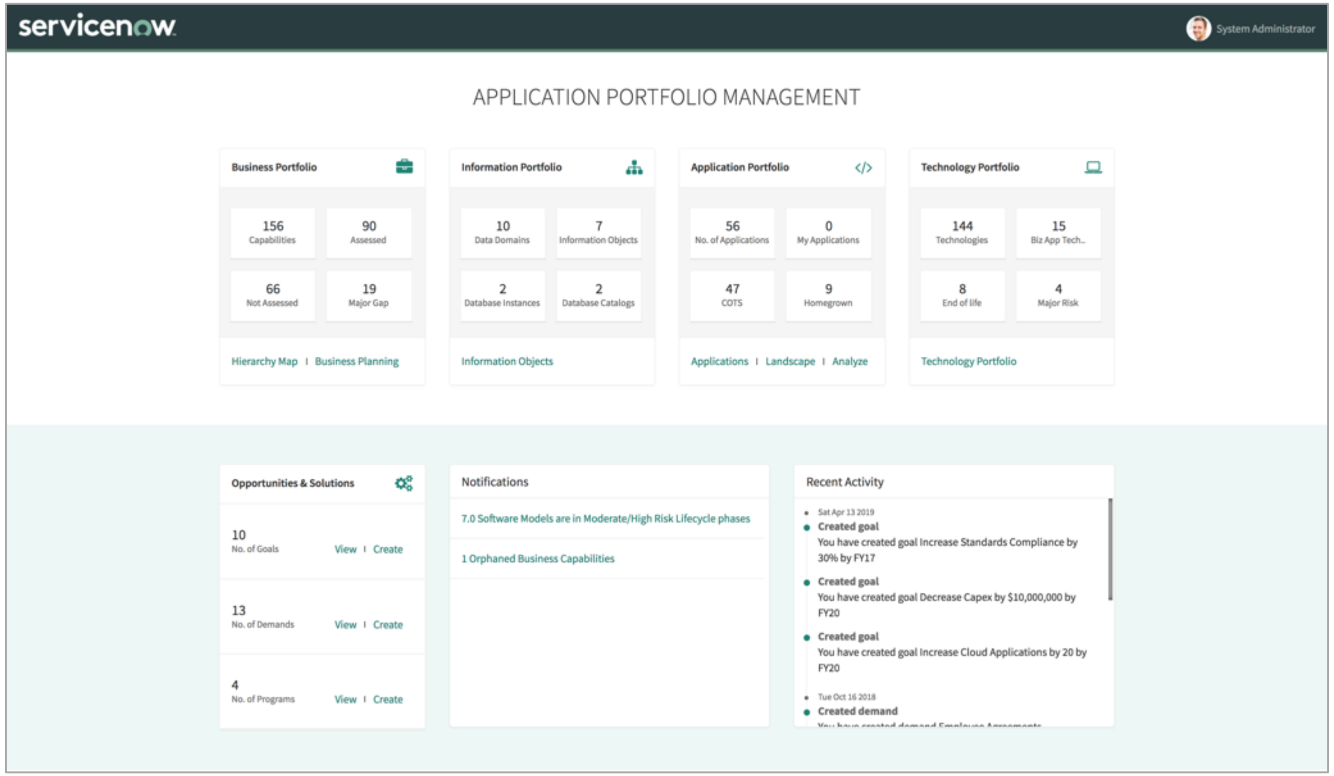
Information Portfolio

Maintain a central list of information used across the enterprise (customer, employee, financial, etc.)

Enable portfolio planning and GRC audits

Integrate with existing data in the Now Platform®

Use the APM Home portal to see statistics information



Application Portfolio Management continued..

Business application as platform host and platform application

- Host your business applications on a platform and track the platform like any other business application of your organization as the **Platform Host** architecture type
- Track the applications that are hosted on the platform as the **Platform Application** architecture type
- You can monitor the performance of the platform through which all your applications operate instead of having to track the individual applications

Enhancements in Technology Portfolio Management timeline

- Use the By Software Model view view to see the list of business applications that run on a particular software model and the application services that the business applications support
- Retain your filter preferences that you've set to filter your business applications
- Your filter settings and preferences are retained anytime you log in again, provided you log in with the same credentials
- Display the life-cycle information of your external publisher data sources of software models in separate timelines instead of a single source that has the least sequence number

Application Portfolio Management continued …

Enhancements in capability-based planning (CBP) view

- Customize the Hierarchy ID field to use your own preferred hierarchy ID by setting the system property flag to true
- View the services that are related to a selected business capability
- Sort, search, and paginate the services that are linked to the business capability in both the Business Capability and Technology Risk views
- Navigate directly to the Business Capability form from the Technology Risk view of the Capability-based planning screen to edit the capability record details

Stakeholder role with read-only permission

- Restrict the level of access of your users with a read-only role that enables them only to view reports and APM PA dashboards and tables

Integration of assessments with business applications and capabilities

- Assess your business applications and business capabilities using assessment-based indicators in an effective custom UI

Exclusive application roadmap view for app owners

- View the demands and projects tied to the applications that you own

Test Management 2.0

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What's New – Test Management 2.0

Test data migration

- Introducing Test Management 2.0 with enhanced testing capabilities and features
- Migrate your existing test data from Test Management 1.0 to Test Management 2.0 by activating the Test Management 2.0 -Data Migration plugin (com.snc.test_migration_v1_v2)

Test Management 2.0 and Project Portfolio Management integration

- Project Portfolio Management no longer activates Test Management 1.0
- To carry out the testing activities on projects, activate both the Project Portfolio Management and Test Management 2.0 applications separately

Scaled Agile Framework (SAFe)

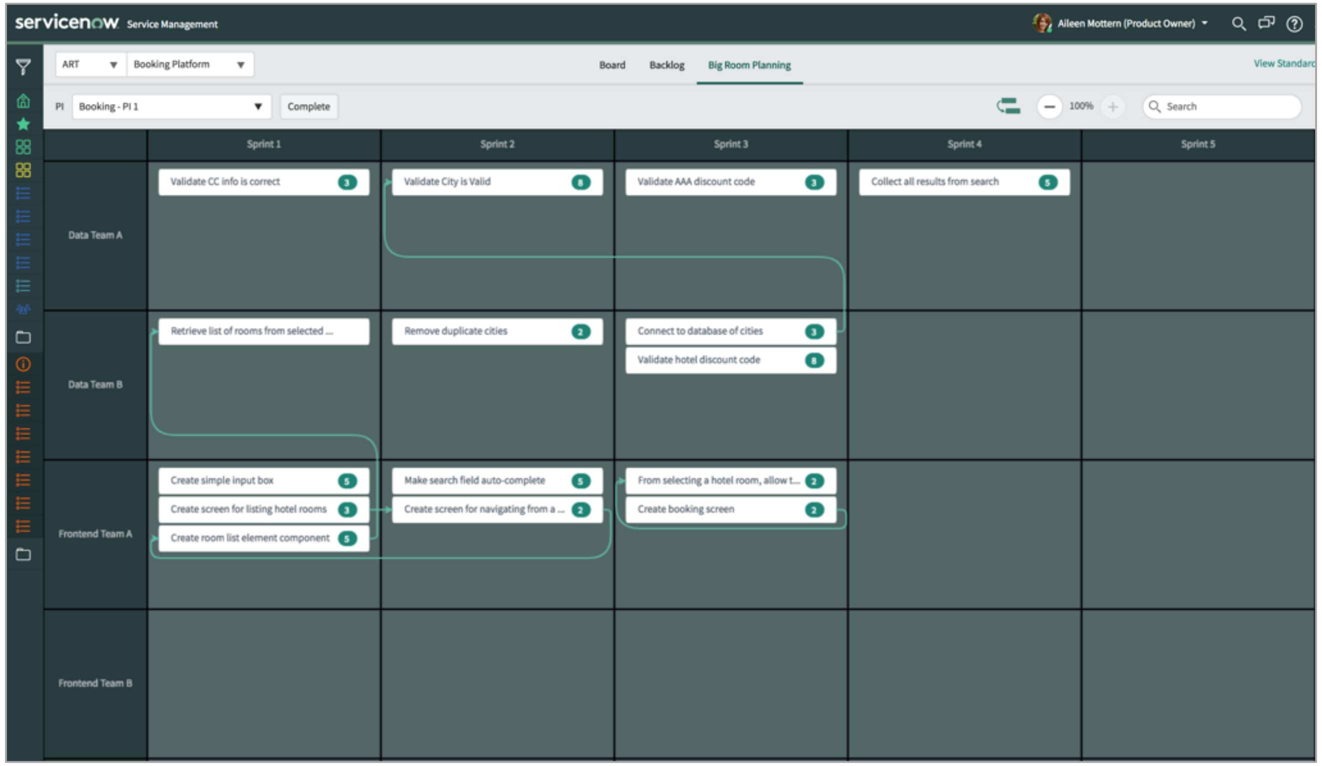
What’s New – Scaled Agile Framework (SAFe)

- Sprint Tracking views
  - Track the progress of your scrum tasks in horizontal lanes in the Task board view
  - Create, track, and complete the scrum tasks of your SAFe stories from the List view

- SAFe tests
  - By activating the Test Management 2.0 plugin (com.snc.test_management.2.0)
  - Verify and pass the acceptance criteria of your SAFe stories by creating and running tests in the SAFe Board
  - Perform the following testing activities from the SAFe Board
  - Create tests for stories within sprints
  - Find the tests to run for the sprint
  - Run tests and view test result
- Epic rollup
  - View rollups and completion percentages as you define and complete work on the larger work items, epic, and feature

Personalized columns
  - Personalize any list on the SAFe Board
  - Configure and view only the columns that are important to you using the personalize list icon

Scaled Agile Framework (SAFe) Continued



Scaled Agile Framework (SAFe) Program Board

Visualize the features of an Agile Release Train's (ART) Program Increment (PI) Plan

View SAFe Features planned for the PI and the dependencies between them

Scale agile across multiple teams

Access both a summary and detailed visualization

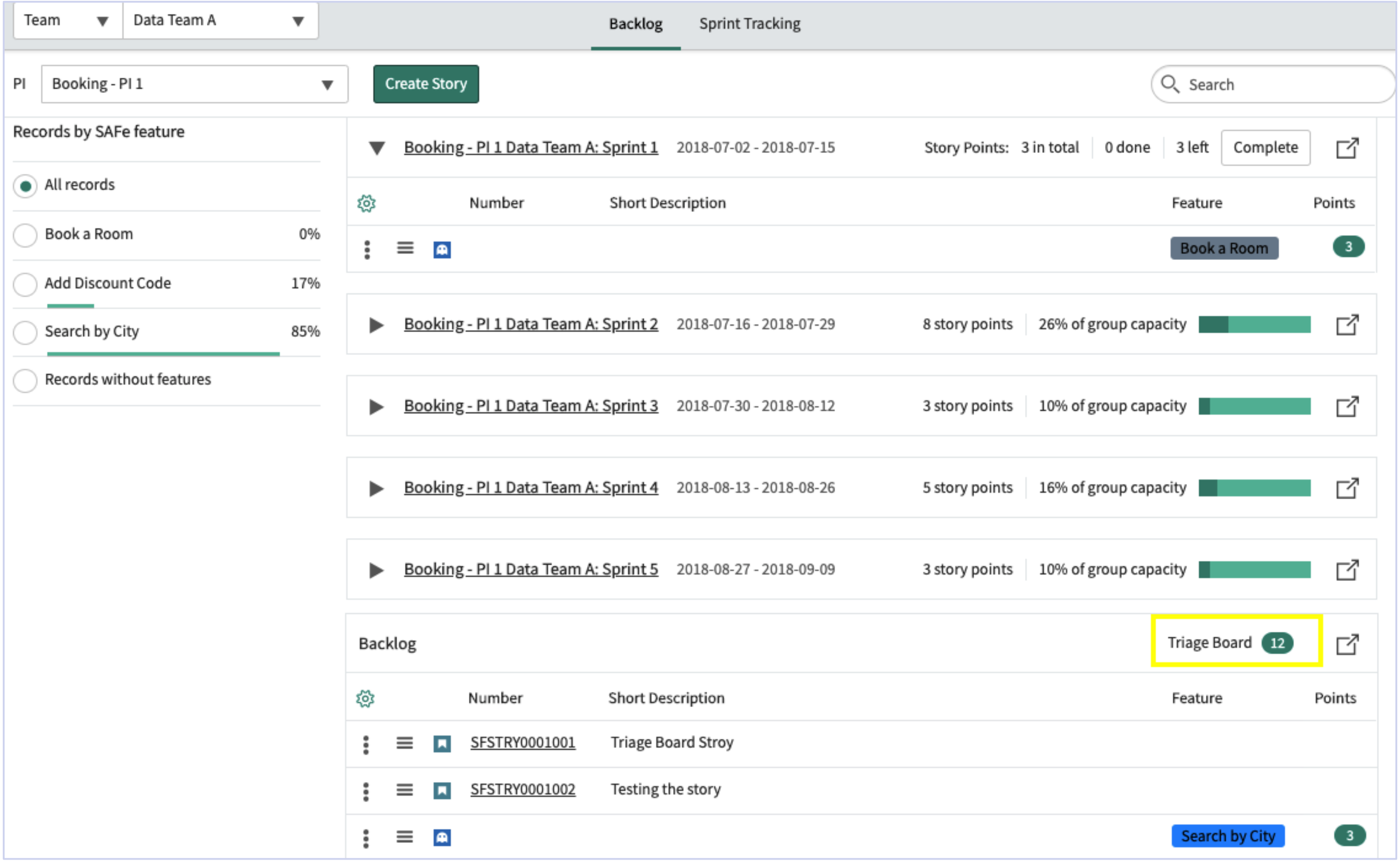
View the dependencies of the features across sprints and teams.

Scaled Agile Framework (SAFe) Continued..

Triage Board
Prioritize and sequence records of different task types, such as defects, incidents, and stories, in a single backlog by using the Triage Board link

Note: The Triage Board link is Available only if you've activated the Agile — Scaled Agile Framework — Unified Backlog plugin (com.snc.sdlc.safe.multi_task)

Accessible only if you have the SAFe scrum master role



Investment Funding

Investment Funding

Investment Funding is a new application in the New York release. Investment Funding enables you to efficiently plan and manage investments by:

- Allocating funds to an investment to meet a business requirement or strategic objective
- Requesting funds from one or more funding sources to achieve business goals

- **Investment Funding features**
  - **Top-down and bottom-up funding**
    - Allocate funds directly to investments based on organizational strategies (top-down)
    - Request funds from one or more funding sources based on your business needs (bottom-up)
- **Continuous funding**
  - Allocate funds to an investment at any time as needed, unlike annual budgeting
- **Integration with Project Portfolio Management (PPM)**
  - Create investments for portfolios, programs, projects, and demands and fund them
  - This integration with PPM enables you to keep the work activities and the funding of these investments separate
- **Domain separation**
  - Domain separation provides complete data isolation for domain-specific users
  - Investment Funding is domain separation compliant at the Data only level, meaning it supports the data security model of separating visibility of data from one domain to another
  - Since Investment Funding process is supported within a domain, request or allocate funds to the parent or child investments applies within the same domain

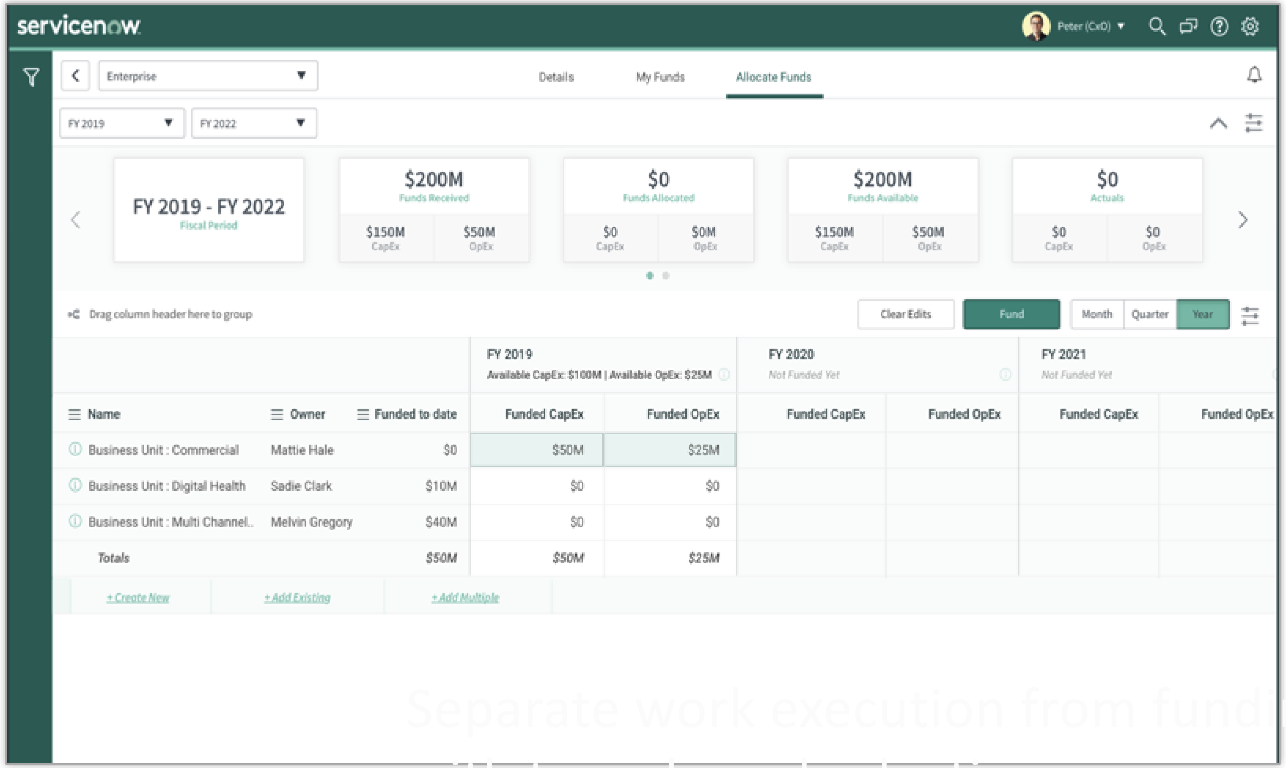
Investment Funding continued..

Investment Funding

Flexible funding approach for your investment dollars
Fund any type of work (e.g. portfolio, project, team)

Centralize investment planning

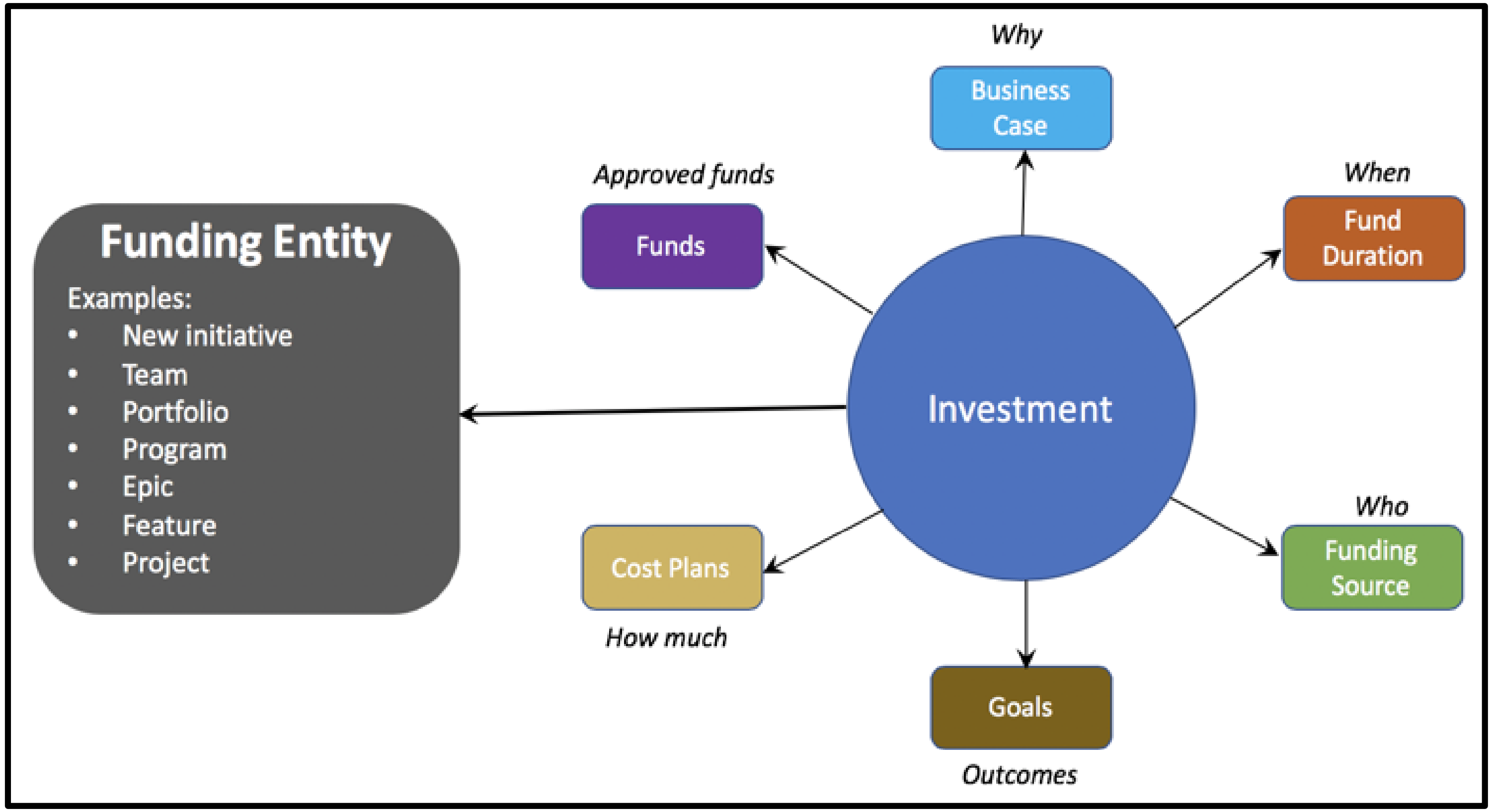
Separate work execution from funding with tops down budgeting



Investment Funding continued..

Funding entities and investments

- A funding entity is one of the transaction tables in the ServiceNow platform that is enabled for funding.
- An investment contains information about the funds, costs, business case, and goals
- An investment is associated to a funding entity
- Use investments to allocate or request funds to meet defined business goals
- Keeping the investment and funding entity separate provides the following advantages:
  - Your work activities are separate from the funding
  - You can fund the same entity for different periods until the goals are met



Key Contacts

Jerry Dolak
EVP jerry.dolak@regoconsulting.com
630-930-3938 (CT)

Doug Greer
ITFM Group Lead
doug.greer@regoconsulting.com
801-573-1303(MT)

Darren Greer
Senior APM Consultant
darren.greer@regoconsulting.com
904-826-5176(PT)

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!
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Email
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Website
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ITBM Plugins – New York Release

Plugin	Status	Description
Agile Development 1.0	Planned for deprecation in Paris.	This plugin has been replaced by Agile Development 2.0 for all new users. Existing users can continue to upgrade and use this plugin. Agile Development 2.0 provides enhanced functionality on top of Agile Development plugin. Please refer to documentation for details.
Agile Development Unified Backlog -[com.snc.sdlc.agile.multi_task]	New in New York.	Include any tasks into your agile workflow. Work with problems, incident tasks, enhancement requests and other ServiceNow tasks just like you do with stories.
Application Portfolio Management - [com.snc.pa.apm.problem]	New in New York.	Access performance analytics metrics of business applications associated with Problem management.
Financial Management For APM - [com.snc.financial_management_for_apm]	New in New York.	Enables integration Financial Management with Application Portfolio Management providing preconfigured Cost Models.Activation of this plugin on production instances may have licensing implications
Financial Management for SPM - [com.snc.financial_management_for_spm]	New in New York.	Enables integration of Financial Management with Service Portfolio Management providing preconfigured Cost Models. Activation of this plugin on production instances may have licensing implications.
Innovation Management - [com.snc.innovation_management]	New in New York.	Idea Management application enables idea managers to manage ideas at organization level.
Investment Planning - [com.snc.investment_planning]	New in New York.	Enables continuous and flexible investment planning for the funding entities based on their priorities and strategic objectives. It provides the options of top-down and bottom-up funding and defunding an entity.
Investment Planning for PPM - [com.snc.investment_planning_pmo]	New in New York.	Enables continuous and flexible investment planning for PPM funding entities based on their priorities and strategic objectives. It provides the options of top-down and bottom-up funding and defunding an entity.
Performance Analytics – Content Pack – Application Portfolio Management	New in New York.	Application Portfolio Management dashboards developed using Performance analytics premium.
Performance Analytics – Content Pack – Application Portfolio Management and Change Management	New in New York.	Provides integration of Application Portfolio Management with Change Management which enables to have performance analytics dashboards of business applications associated with Change requests.

ITBM Plugins – New York Release

Plugin	Status	Description
Portfolio Management - [com.snc.portfolio_management]	New in New York.	The Portfolio Management plugin.
PPM Mobile - [com.sn_ppm.mobile]	New in New York.	This plugin provides Project Portfolio Suite Mobile user experience. This provides access to project status and project status report in the agent mobile application. Project Portfolio Suite with Financials is required. But if it is not active, installing PPM Mobile also activates PPS with Financials plugin.
Project Portfolio Management - [com.snc.financial_planning_pmo]	New in New York.	Enables you to manage your demands, resources, portfolios and projects, and gives full visibility from idea to execution. Agile management and test management help you to improve productivity and service delivery.
Read only roles for Application Portfolio Management - [com.snc.apm_read_roles]	New in New York.	The plugin provides read only roles for Application Portfolio Management.
Read only roles for Project Portfolio Suite with Financials - [com.snc.pmo_read_roles]	New in New York.	Read only roles for Project Portfolio Suite with Financials.
Scaled Agile Framework - [com.snc.sdlc.safe]	New in New York.	Use SAFe to apply lean and agile principles to your organization.
Service Portfolio Management Core - [com.snc.service_portfolio_core]	New in New York.	This plugin contains core functionality for Service Portfolio Management available out of the box by default.
Service Portfolio Management Estimated Spend [com.snc.spm.spend]	New in New York.	Collects service offering cost and allows for selection between local model and Financial Management model.
Service Portfolio Management SLA Commitments - [com.snc.service_portfolio.sla_commitment]	New in New York.	Allows commitments to be defined by an SLA, so that staff can track how efficiently the service desk meets commitments for a service offering.
Test Management 2.0 - [com.snc.sdlc.test_management]	New in New York.	Write tests, run them and track the health of your sprints in one consolidated Sprint Tracking view. Create test suites, test plans and track their execution.
Test Migration V1 V2 - [com.snc.test_migration_v1_v2]	New in New York.	The Test Migration plugin provides functionality for migrating Test Case, Test and Test Suite to Test Management 2.0 Test version, Test Step and Test Set.
Timeline Visualization - [com.snc.timeline_visualization]	Changed in New York.	Timeline Visualization plugin enables graphical representation of activities over time. You can use this visualization to provide a high-level view of your organization's strategic and operational activities such as incidents, problems, changes, and projects.