



regoUniversity 2019

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Resource/Portfolio  
Management | OOTB  
Introduction

Your Guides: Kathleen Wittleder and Grant Zemont

# Introductions

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



# Agenda

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- Portfolio Planning
- Resource Management
  - Requesting and Booking Resources
- Reports and Dashboards

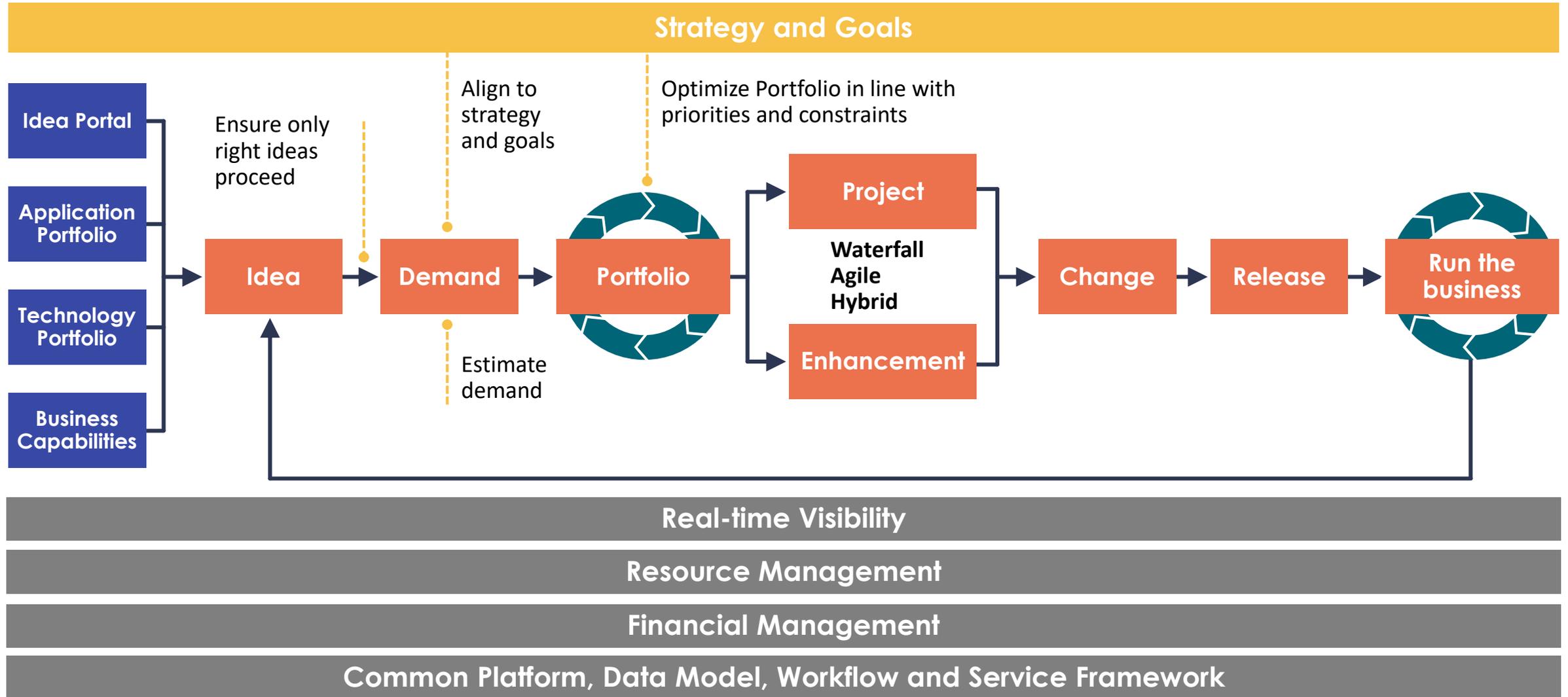
# Portfolio Planning

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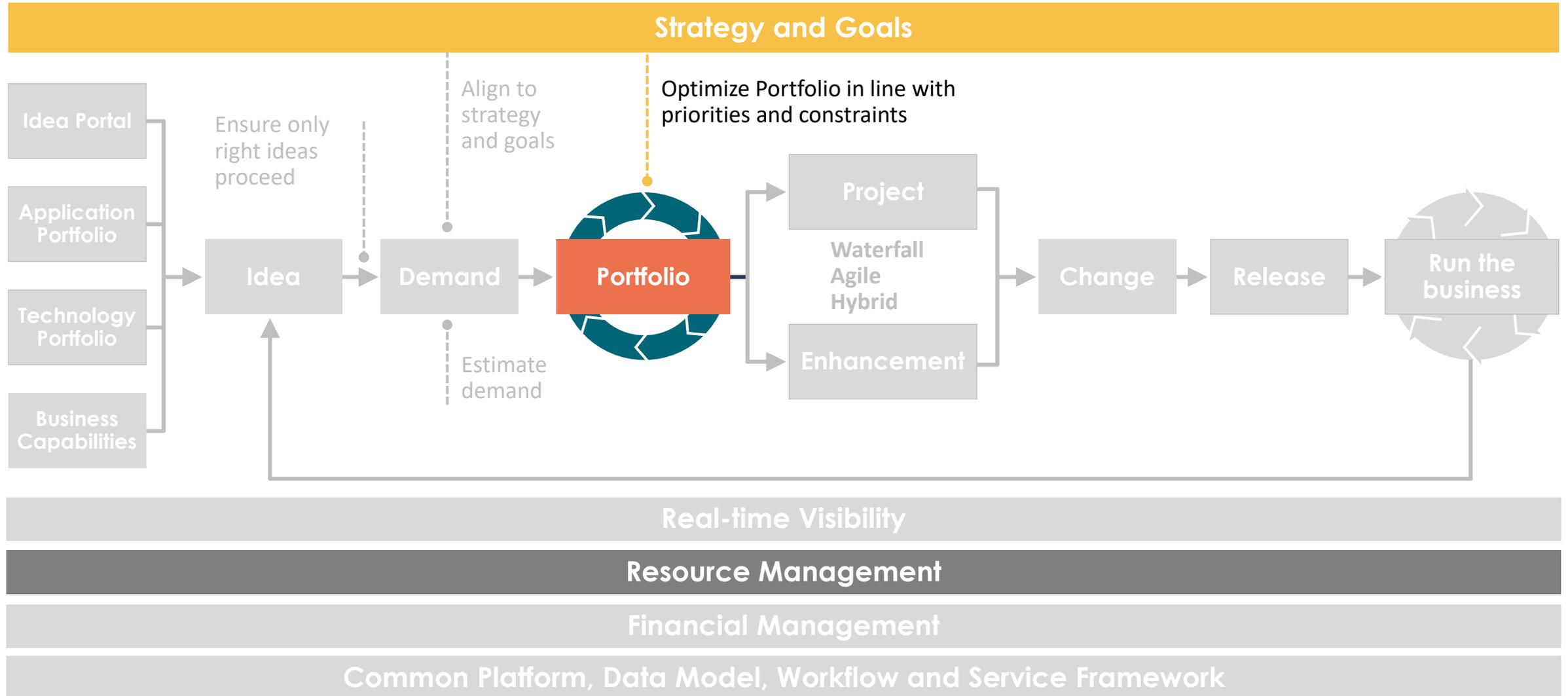
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# ServiceNow PPM Flow



# Today's Focus



# What Is a Portfolio?

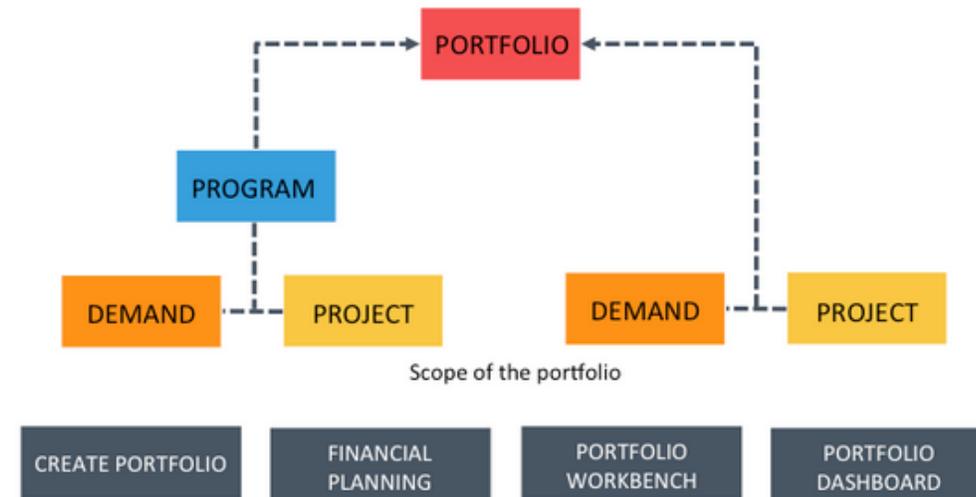
A collection of Demands and Projects aggregated for budgeting, approval, and performance tracking purposes. It exists to achieve one or more organizational strategies.

- May consist of past, current, and future investments.
- Gives visibility into all program and project work by Portfolio including costs, resources, and schedule.
- Continually evolving with investments rotating in and out of the Portfolio.
- An organization may have more than one Portfolio, each addressing unique organizational needs.
- A Demand or Project can only be assigned to one Portfolio.

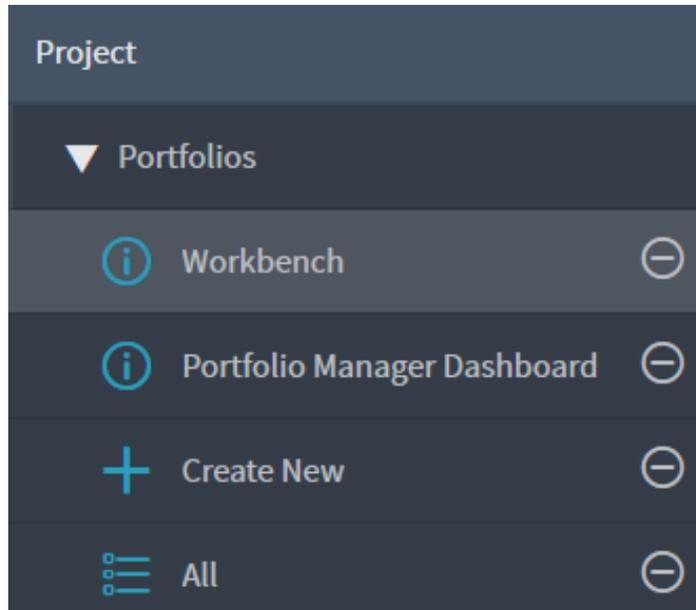
# Overview of Portfolio Management

The Portfolio Management application provides several capabilities to the Portfolio manager:

1. Create a Portfolio by adding related programs, projects, and demands.
2. Perform annual Portfolio planning by selecting demands, projects, and programs.
3. Track the progress and status of all the programs, projects, and demands that are part of the Portfolio. You can track the costs, resources, schedules, risks, and issues.



# The Portfolio Application



Central location to view and monitor the progress of the program, the projects, and demands that are part of each Portfolio

Central location to generate different graphical reports of Portfolios and financials for Portfolios **you** manage

Create a new Portfolio

View all Portfolios in ServiceNow

# Portfolio Properties

- The Portfolio properties are now displayed and can be updated by the Portfolio Manager. Note the **Portfolio planning** attribute:
  - **Simple** gives you Step 1 and 2 in the portfolio planning process.
  - **Advanced** gives you Steps 1-4 in the portfolio planning process.

The screenshot shows a form for managing portfolio properties. It includes the following fields:

- Name:** Innovation Portfolio
- Portfolio manager:** Megan Burke (Portfolio Mgr)
- Portfolio planning:** Advanced
- Description:** Innovation LOB Portfolio

- The Related Lists are rollups from Projects and Demands in the Portfolio – makes reporting easier.

The screenshot shows the 'Demands' related list for the 'Innovation Portfolio'. The list includes a search bar, a filter for 'Portfolio = Innovation Portfolio', and a table of demand records.

Number	Name	Program	Stage	Project	Priority	Score	Start date	Due date
<a href="#">DMND0001113</a>	I would like the ABC application to be upgraded	(empty)	<span style="color: green;">✔</span> Demand Approved	(empty)	4 - Low	5.88		

# Portfolio Related Lists

- **Demands** – Lists the Demands that are part of the Portfolio.
- **Projects** – Lists the Projects that are part of the Portfolio. Click Edit to add existing Projects to the Portfolio.
- **Programs** – Lists Programs that are part of the Portfolio.
- **Risks** – Lists the Risks that are part of the Portfolio. The Program, Project, and Demand Risks are also displayed in this list.
- **Issues** – Lists the Issues that are part of the Portfolio. The Portfolio, Program, Project, and Demand Issues are also included in this list.
- **Cost Plans** – Lists the cost plans of the Projects and Demands that are part of the Portfolio.
- **Benefit Plans** – Lists the benefits plans of the Projects and Demands that are part of the Portfolio.
- **Portfolio Target** – Lists the Portfolio Capital and Operational expense targets for different fiscal years.
- **Planning and Budgeting** – Breakdown of budgeted costs by Fiscal Year as set in Step 3 and 4 in the Portfolio Workbench.
- **Stakeholder Register** – List of Stakeholders associated with the Portfolio. Used for Demand Assessments.

# Accessing The Portfolio Workbench

- In the Application navigator, enter “Workbench” and follow the path Project > Portfolio > to select **Portfolio Workbench**.
- You will see a card of all the available Portfolios to view.
- In the top right, click the configuration icon to select the colors for projects, tasks, Portfolios, and so on. The workbench uses these colors to display the items in the Portfolio in the Gantt chart in timeline view.

The screenshot displays the Portfolio Workbench interface. On the left is a dark sidebar with a search bar containing 'workbench' and a list of categories: Demand, Change, Project, Portfolios, Programs, Projects, Settings, Resource, and Cost Transparency. The 'Workbench' item under 'Portfolios' is highlighted with a red box. The main area shows a grid of portfolio cards, each with a title, owner, and description. A configuration panel is open on the right, titled 'Dashboard Configuration', showing color selection options for Project (blue), Project Task (teal), Portfolio (purple), Program (green), Program Task (light green), and Demand (red). A red box highlights the configuration icon in the top right corner of the main area.

Portfolio Name	Owner	Description
Customer Support	Boris Catino	
Finance & Contracts	Cristina Sharper	
IT Applications Modernization	Megan Burke (Portfolio Mgr)	Projects to build the cost effective, modernized IT applications
IT Operations	Megan Burke (Portfolio Mgr)	All operations projects maintained by IT organization
Miscellaneous Finance		IT Portfolio of Demands and Projects servicing Finance
Miscellaneous HR		IT Portfolio of Demands and Projects servicing HR
Miscellaneous Sales		IT Portfolio of Demands and Projects servicing Sales
Mobile Transformation	Megan Burke (Portfolio Mgr)	All Programs and Projects related to make organization march towards digital transformation
Regulatory and Compliance	Megan Burke (Portfolio Mgr)	All Projects and Programs that are undertaken to meet the Regulatory and compliance standards
Sales & Marketing	Allyson Gillispie	
Supply Chain Management	Chase Furler	
test	Megan Burke (Portfolio Mgr)	tadst

# Using The Portfolio Workbench

Fiscal Year is identified for the Portfolio planning.

The four planning steps for the Portfolio and progress thus far. This is an advanced planning view. For simple planning steps 3 and 4 are not present.

The screenshot displays the Portfolio Workbench interface. On the left, the 'Fiscal Year' is set to 'FY19'. Below it, 'Planning Steps' are shown as a progress bar with four steps: 1 (green check), 2 (green check), 3 (green check), and 4 (grey circle). Step 1 is 'Revise Target' with a value of \$1.9M. Step 2 is 'Select Demands and Projects' with a value of \$1.6M. Step 3 is 'Budgeting' with a note 'Budget Period is closed.' and a link to 'FY19: Innovation Portfolio V3'. Step 4 is 'Forecasting' with a link to 'FY19: M03-Mar: Innovation Portfolio V4'. The main area shows an 'Innovation Portfolio' table with columns for Number, Short description, Priority, and Selected for execution. A 'Track Portfolio' button is visible in the top right. A legend indicates that a green check means 'Selected for execution for the selected financial year' and a grey circle means 'Not selected for execution for selected financial year'.

Number	Short description	Priority	Selected for execution
DMND9001101	Develop Cutting Edge SAN storage devices	2 - High	✓
DMND9001107	Implement VMware for Windows	2 - High	⊘
PRJ0010498	Sunset Skype Platform	4 - Low	⊘
PRJ0010119	Dema Migration	4 - Low	✓
DMND0001107	SOS Chlorine	4 - Low	✓
PRJ0010079	Shut Down Dema	4 - Low	✓
PRJ0010094	New Directions East Project	4 - Low	✓
DMND0001103	Morph Release 1.0	4 - Low	✓
PRJ0010329	TOP Implementation	4 - Low	⊘

Track a Portfolio that has been planned (Step 1-3 has been completed)

List of demands and projects included in the Portfolio for the fiscal year. Green check indicates those that have been selected execution for the fiscal year. **Expected start and due dates must be populated and demand must be approved or qualified.**

# Portfolio Planning Process Within ServiceNow

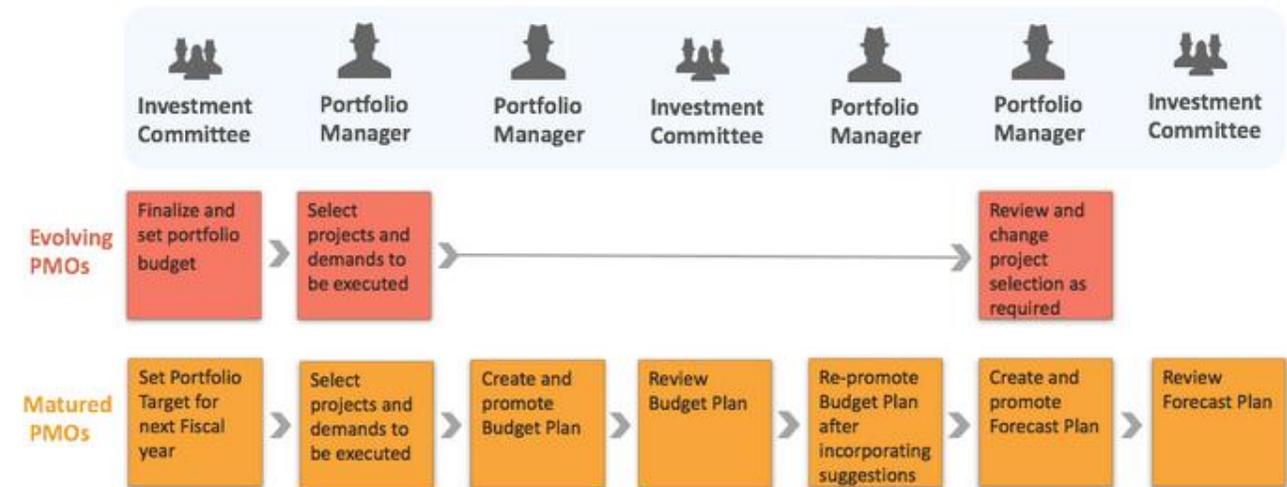
Portfolio Planning occurs in 2 or 4 steps within the Portfolio Workbench:

## Simple Planning:

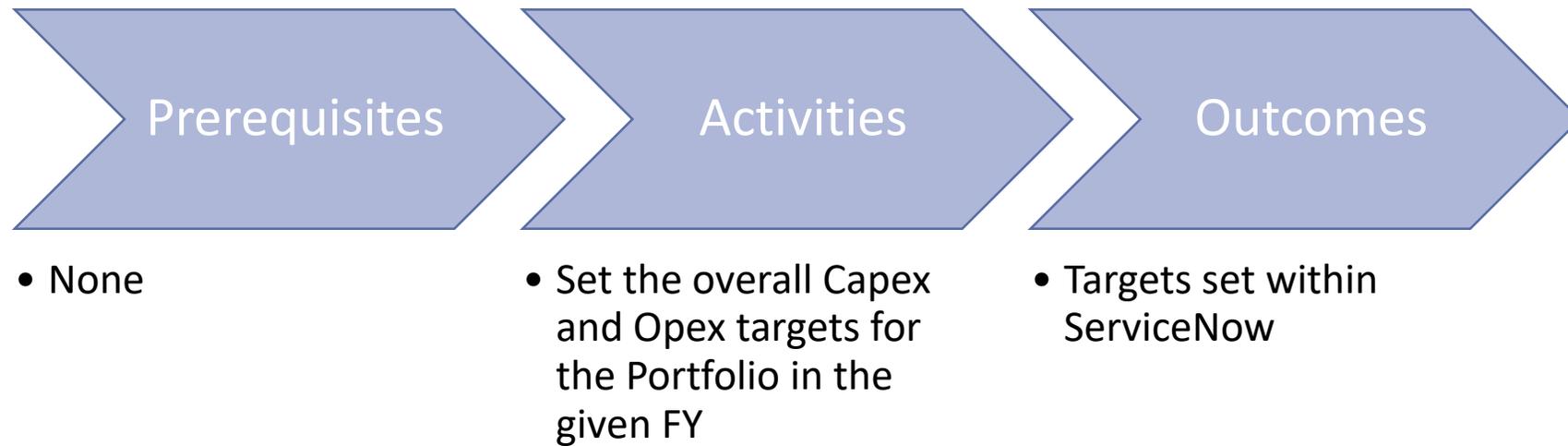
1. Set Portfolio Targets
2. Select Demands and Projects to approve and track within the Portfolio

## Advanced Planning:

1. Set Portfolio Targets
2. Select Demands and Projects to approve and track within the Portfolio
3. Set and approve budgets for selected Demands/ Projects
4. Set and approve (monthly, quarterly) re-forecasts if needed



# Step 1: Workflow



# Step 1: Set Targets

1. Drop down to choose the fiscal year for which you want to plan. If your fiscal year does not appear the fiscal year will need to be created.
2. The Planning Steps show which steps you are on and shows completed steps (checkmark).
3. Click the **Set Target** button to set CapEx and OpEx Portfolio Targets.
4. Click the **Save** button to save the CapEx and OpEx targets.

Fiscal Year

Select the fiscal Year to Plan

FY18

Planning Steps

1 2 3 4

Step 1: Set Target

No Target has been set yet. Set the target for the portfolio

Set Target

Set Target

\* Capex Target

1750000

\* Opex Target

450000

Total Target

2200000

Save

# Step 2: Workflow



- Step 1 Complete
- Demands/ Projects associated with the Portfolio
- Planned Costs on the Demands/ Projects
- Resource Plans on the Demands/ Projects in Requested, Confirmed, or Allocated state
- (optional) Budgets set on the Demands/ Projects

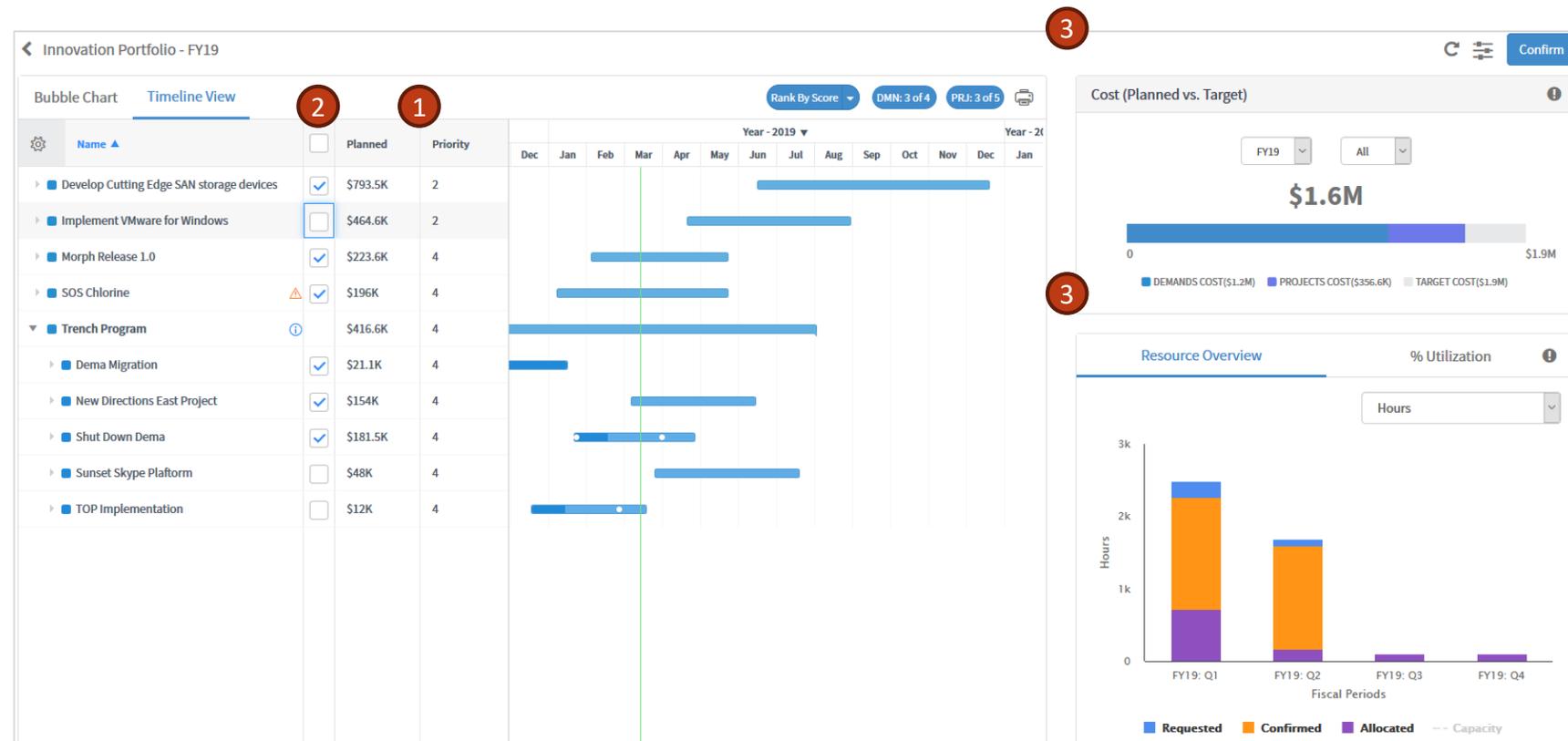
- Using the Timeline View and Bubble Chart, perform what-if analysis by selecting and deselecting Demands/ Projects from the Portfolio
- Adjust Capex and Opex budgets within Workbench or on Demand/Project records

- Set of selected Demands and Projects that fit within the Portfolio Target Parameters
- Selected Demands become Approved
- Confirmed Resource Plans on selected Demands/ Projects become Confirmed

# Step 2: Select Demands and Projects

In this step, select the demands and projects that are to be included in this fiscal year's Portfolio budget.

1. You can view the planned cost for each project or demand within the fiscal year, along with their priorities.
2. What-If analysis can be performed to determine the final selection of demands and projects for the Portfolio's fiscal budget.
3. As investments are selected/de-selected, Cost and Resource graphs update to aid in what-if analysis.



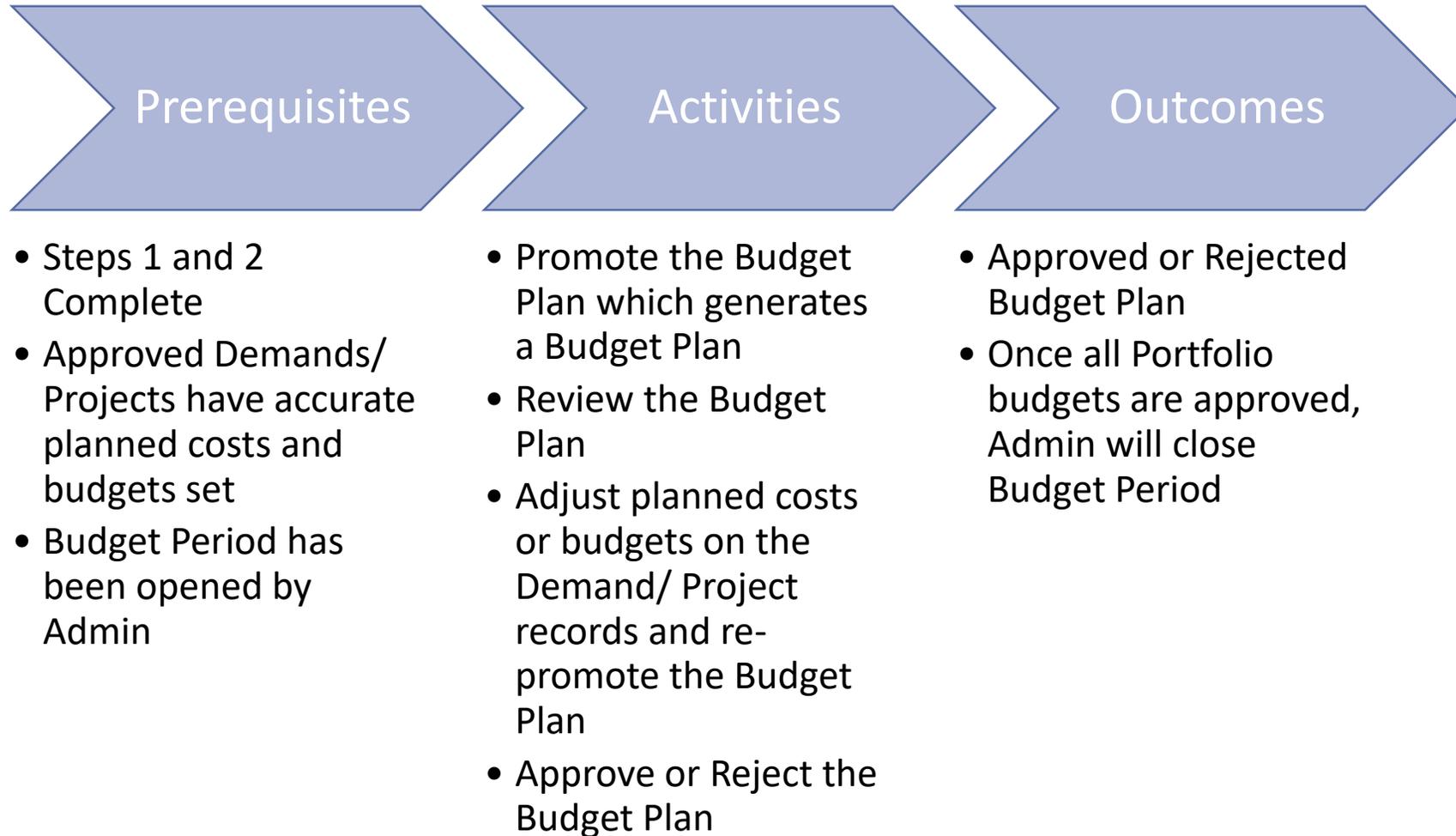
# Step 2: Compare Demands and Confirm Portfolio

As you perform what-if analysis, compare the Demands against each other in terms of Risk and Value, then confirm the Portfolio Plan.

1. Demands are plotted via Demand Assessments completed by Portfolio Stakeholders. Bubbles with blue outlines has been selected for execution on the Timeline View tab.
2. Once the right blend of Demands has been agreed upon, click **Confirm** to approve the portfolio plan. You can also approve all Demands at this stage, as well as confirm all resource plans in Requested state on approved Demands.

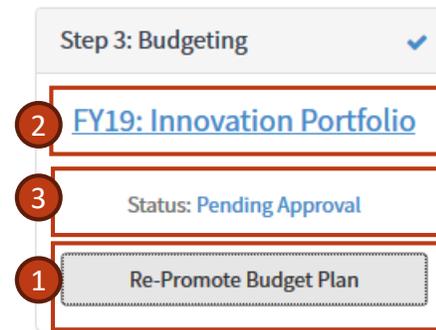


# Step 3: Workflow



# Step 3: Set and Approve Budgets

- Promote the Budget Plan which takes the planned and budget costs from Step 2.
- Review the budget numbers the Demands/ Projects within the Portfolio. If changes need to be made, update on the Demand/ Project record or within Step2, then re-promote the Budget Plan.
- Approve/ Reject the Budget Plan. Once this happens, Budget cost fields on Demands/ Projects become read-only.



FY19: Innovation Portfolio V10

Grid Form

Year Quarter Month

Portfolio → Portfolio Task

Portfolio	Portfolio Task	Expense Type	FY19: M01-Jan Budget	FY19: M02-Feb Budget	FY19: M03 Budget
▼ Innovation Portfo...			\$119,900.00	\$225,350.00	\$416,
	▶ Morph Release 1.0		\$22,400.00	\$45,650.00	\$57,
	▶ New Directions Demand		\$0.00	\$0.00	
	▼ SOS Chlorine		\$56,700.00	\$57,600.00	\$37,
		Capital	\$26,700.00	\$27,600.00	\$7,
		Operating	\$30,000.00	\$30,000.00	\$30,
	▶ Develop Cutting Edge SAN storage devi...		\$0.00	\$64,000.00	\$229,
	▶ Shut Down Dema		\$26,150.00	\$34,100.00	\$34,
	▶ New Directions East Project		\$1,600.00	\$16,000.00	\$56,
	▶ Dema Migration		\$13,050.00	\$8,000.00	
	▶ TOP Implementation		\$0.00	\$0.00	
	▶ Project Planning Sessions		\$0.00	\$0.00	

Budget Task - BTK0001015 [Default view\*]

Follow Grid Form Update

Number: BTK0001015 \* Period: FY19

\* Plan: Innovation Portfolio State: Pending Approval

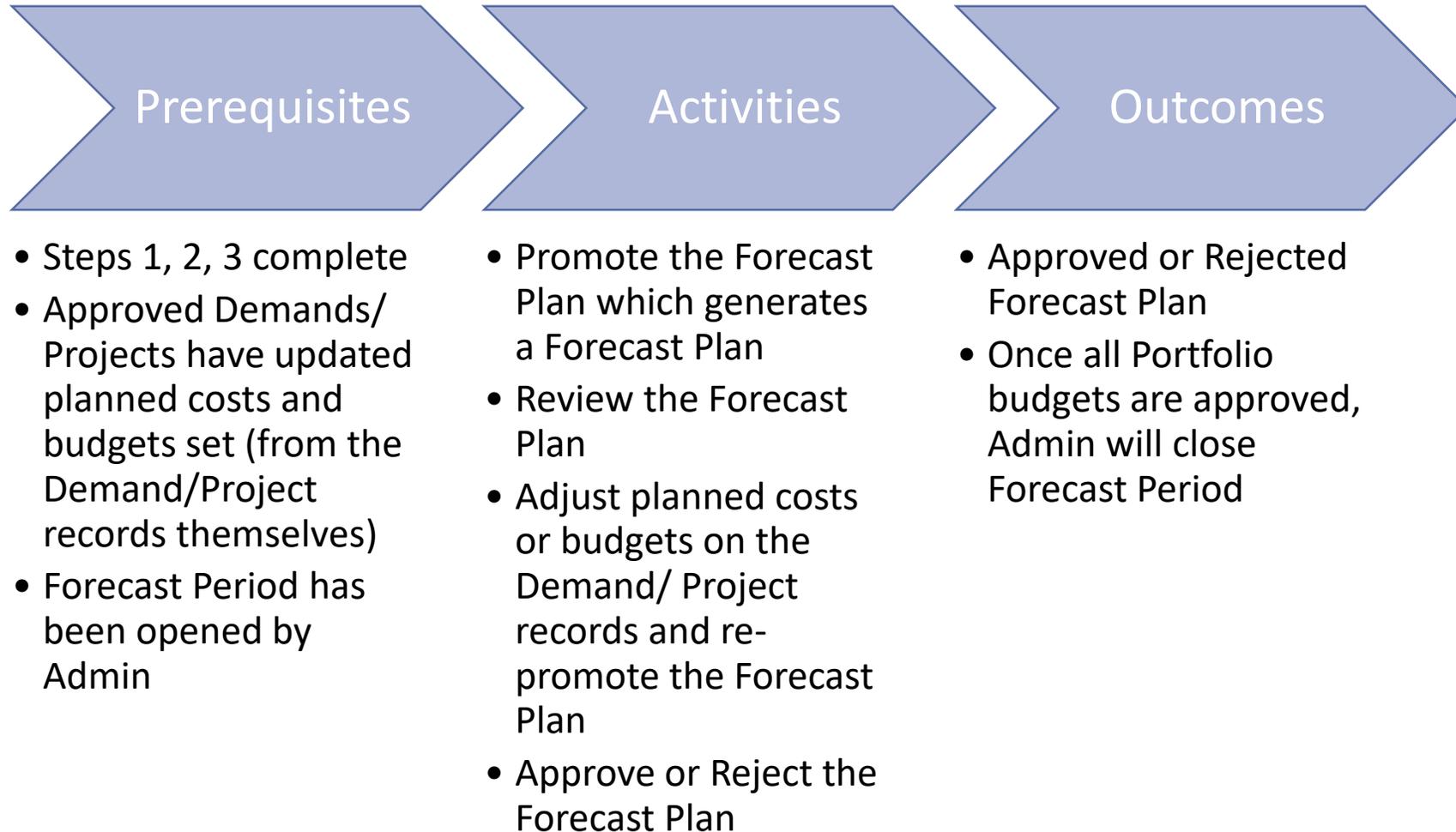
Planner: Megan Burke (Portfolio Mgr)

Short description: FY19 - Innovation Portfolio Budget Request

Additional comments (Customer visible): Additional comments (Customer visible)

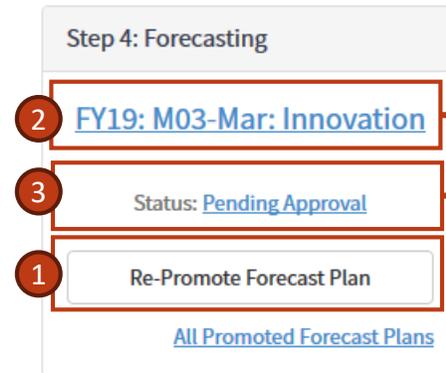
Work notes Post

# Step 4: Workflow



# Step 4: Re-Forecasted Budgets

1. Promote the Forecast Plan which takes the planned and budget costs from Step 2.
2. Review the forecast numbers the Demands/ Projects within the Portfolio. If changes need to be made, update on the Demand/ Project record or within Step2, then re-promote the Forecast Plan.
3. Approve/ Reject the Forecast Plan.



FY19: M03-Mar: Innovation Portfolio V5

Grid Form

Year Quarter Month

Portfolio

Portfolio	Portfolio Task	Expense Type	FY19: Q1 Budget	FY19: Q2 Budget	FY19: Q3 Budget
Innovation Portfo...			\$761,266.67	\$850,983.33	\$0.00
	New Directions Demand	Capital	\$0.00		
	Dema Migration	Capital	\$5,050.00	\$0.00	\$0.00
	Dema Migration	Capital	\$16,000.00	\$0.00	\$0.00
	SOS Chlorine	Capital	\$61,800.00	\$14,200.00	\$0.00
	Morph Release 1.0	Capital	\$0.00	\$11,000.00	\$0.00
	Morph Release 1.0	Capital	\$125,800.00	\$86,800.00	\$0.00
	Shut Down Dema	Capital	\$58,600.00	\$113,000.00	\$0.00
	TOP Implementation	Capital	\$0.00		

Budget Task - BTK0001016 [Default view\*]

Follow Grid Form Update

Number: BTK0001016 \* Period: FY19: M03-Mar

\* Plan: Innovation Portfolio State: Pending Approval

Planner: Megan Burke (Portfolio Mgr)

Short description: FY19: M03-Mar - Innovation Portfolio Forecast Request

Additional comments (Customer visible): Additional comments (Customer visible)

Work notes Post

# Resource Management

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# Overview of Resource Management

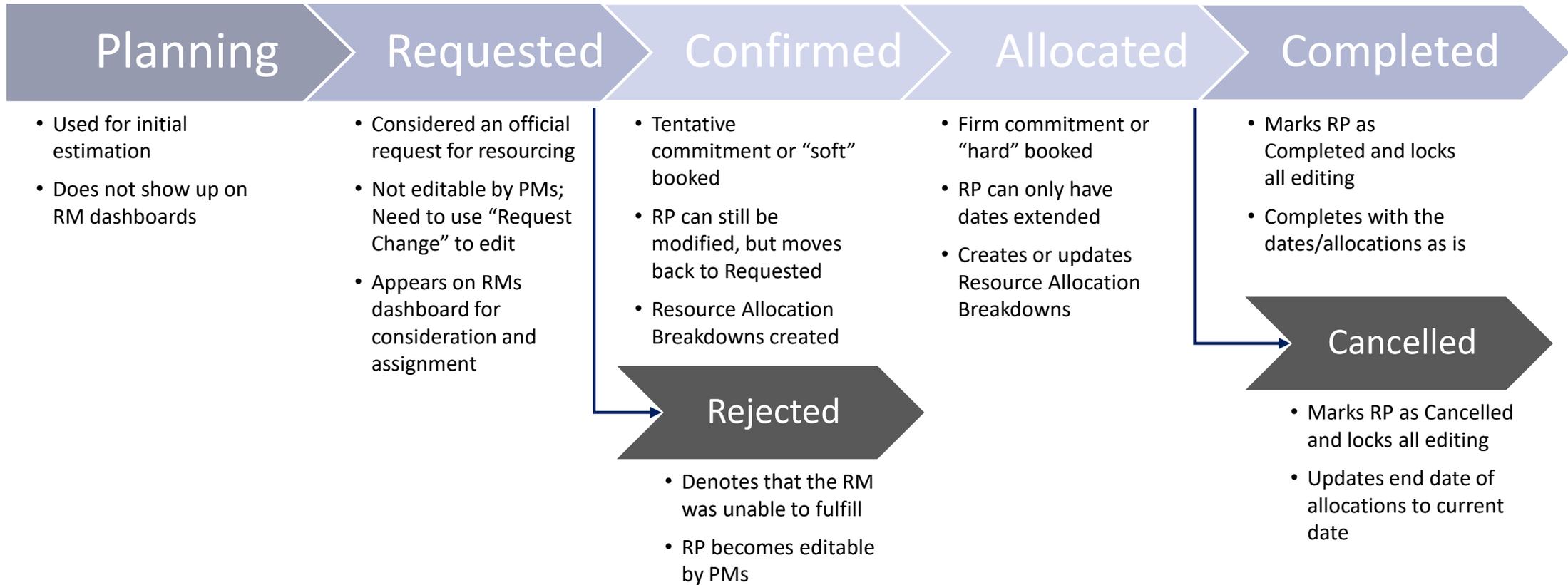
## Resource Management

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

## Roles

- **Resource Requestor** (Demand Manager/Project Manager) – Requests Groups/Resources by creating resource plans.
- **Resource Manager** – Analyzes the impact of Resource Plans on resource utilization and availability. From that, commits resources to work.

# Resource Planning Process Overview



# Requesting and Booking Resources

# Overview of Resource Management

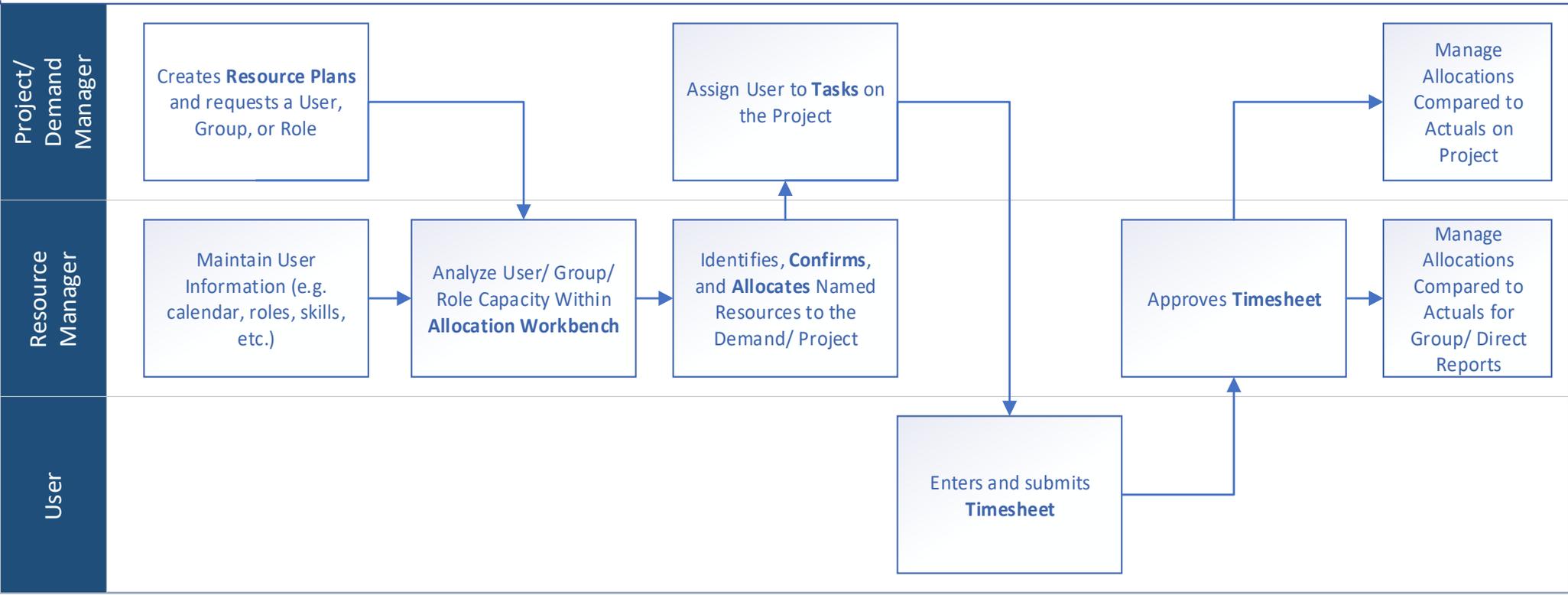
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# Typical Resource Planning Process (1)



# Typical Resource Planning Process (2)

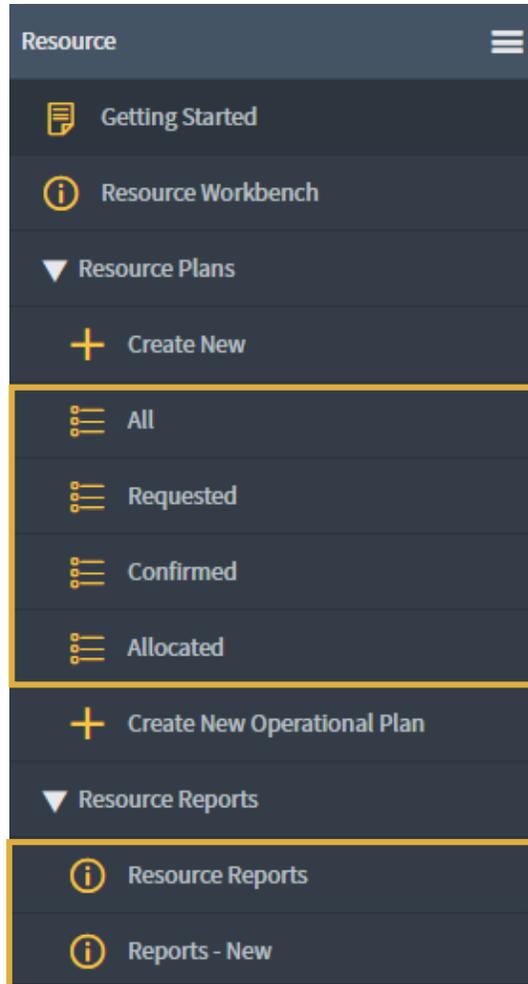
1. The Demand/ Project Manager requests resources by creating Resource Plans that ask for a specific group, user, or role to perform required tasks.
2. Once the Demand/ Project Manager is ready to request the resource, they change the **State** of the Resource Plans from **Planning** to **Requested**. Depending on the process, this can occur on a Demand or a Project.
3. Resource Managers review requests made of their team within the **Allocation Workbench**, and using the Resource Finder, determine who
4. Using the Resource Finder, Resource Managers identify the appropriate skill set for the request, review existing allocations and utilization of their team, and **Confirm** specific users to Projects and Demands. This creates a *soft booking*.

# Typical Resource Plan Process (2)

5. As the project moves closer to the actual start date, the Resource Manager can **Allocate** resources to work within the **Allocation Workbench**. There should be a high level of confidence in the specific resource, the hours, and the dates. This creates a *hard booking*.

Note: If a Demand is Approved and converted to a Project, Resource Plans from the Demand will move to the Project.

# Resource Application



ServiceNow Online documentation

View, Model, Confirm, and Allocate Resource Plans

Create a new Resource Plan

Lists of Resource Plans in different States

Create an Operational Resource Plan

Availability, Allocation, and forecasting reports

# Resource Workbench

- The Resource Workbench gives Resource Managers a comprehensive view of Resource Plans, allocations, utilization and availability for a specific Groups, Resources, Projects/Demands, Portfolios, Group Manager, Roles, Programs, User Manager in order to Confirm and/or Allocate resources.
- Go to Resource Plans> Resource Workbench> Allocation Workbench

Allocation workbench  
All Active Projects and Demands

2018-12-09 2019-06-09 Go New Plan P R ✓ C ✓ A ✓ Week Month Hours

Resource name	Planned	State	Aug 2018		Sep 2018		Oct 2018		Total
			Planned	Conf/Alloc	Planned	Conf/Alloc	Planned	Conf/Alloc	Planned
▼ Annual Comp Application									
▶ [G] Core R&D group	2.5 FTE	Confirmed			439	439	441		1320
▶ [G] Analysts	2.5 FTE	Confirmed	320	320	439	440	441		2500
▶ [G] Project Managers	1 FTE	Confirmed	128	128	176	176	176		1000
▶ Design Web Portal for Employees									
▶ Employee On-boarding									

# Resource Workbench Process

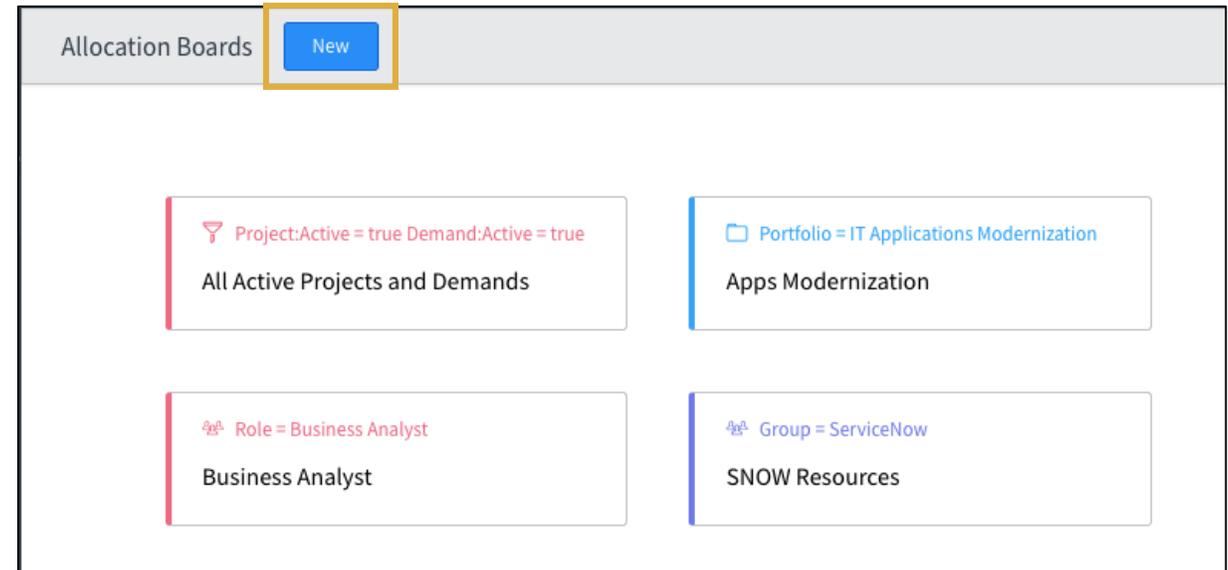
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1. Configure an Allocation Board
2. Find named resources to fit the requests (State = Requested)
3. Confirm and/or Allocate Resource Plans
4. Level allocations

# Step 1: Create Allocation Boards

Allocation Boards are “cards” that filter for specific resource plans that you want to review or manage.

- To manage Resource Plans in an existing Allocation Board, simply click on the board card containing the selection criteria of the resource plans you want to manage
  - The bottom of the card provides the user-defined Title of the Allocation Board
  - The top of the card provides the selection criteria used by the Allocation Board
- Select **New** to create a new Allocation Board card



# Allocation Workbench Overview

Allows you to change the date range to review after clicking **Go**

Create a new resource Plan directly from the Workbench

Resource Plan Types:  
Planned, Requested, Confirmed, Allocated

Timeline:  
Weekly, Monthly

View by:  
Hours, FTE, Person Days

Edit or Delete the Allocation Board

Project/  
Demand  
Name

Resource Plan  
type:  
**[G]roup,**  
**[R]ole,**  
**[U]ser,**  
**[S]kill**

Click to **Edit**  
the Plan

Hover to see warning messages

The screenshot shows the Allocation Workbench interface. At the top, there's a header with a back arrow, the title "Allocation workbench", and a subtitle "All Active Projects and Demands". Below the header is a toolbar with a date range selector (2018-12-09 to 2019-06-09), a "Go" button, a "New Plan" button, and buttons for Resource Plan Types (P, R, C, A). There are also buttons for Timeline (Week, Month) and View by (Hours, FTE, Person Days). On the right side of the toolbar, there are icons for Edit/Delete and Find a named resource. The main area is a table with columns for Resource name, Planned, State, and monthly breakdowns (Aug 2018, Sep 2018, Oct 2018, Total). The table lists several resource plans, including "Annual Comp Application", "[G] Core R&D group", "[G] Analysts", and "[G] Project Managers".

Resource name	Planned	State	Aug 2018		Sep 2018		Oct 2018		Total
			Planned	Conf/Alloc	Planned	Conf/Alloc	Planned	Conf/Alloc	Planned
Annual Comp Application									
[G] Core R&D group	2.5 FTE	Confirmed			439	439	441		1320
[G] Analysts	2.5 FTE	Confirmed	320	320	439	440	441		2500
[G] Project Managers	1 FTE	Confirmed	128	128	176	176	176		1000
Design Web Portal for Employees									
Employee On-boarding									

Configure  
Columns  
Viewed

Find a named  
resource –  
***see next slide***

Actions available:  
Request, Confirm,  
Allocate, Reject,  
Delete

# Step 2: Find and Confirm/ Allocate Resources

The **Resource Manager** can...

1. Choose a Resource Plan
2. Find matching Users with the Resource Finder
3. View Availability, perform user searches and **confirm** or **allocate** specific individuals to the selected Resource Plan

The screenshot displays the 'Allocation workbench' for 'All Active Projects and Demands'. It shows a resource plan for 'Project Managers' with a state of 'Confirmed' and 0.35 FTE. The plan is broken down by month (Aug 2018, Sep 2018, Oct 2018) and total planned hours. A search for 'Project Managers' is active, showing a list of users with their availability for the selected months. The 'Confirm' button is visible, and 2 rows are selected in the availability table.

Resource name	Planned	State	/Alloc	Aug 2018		Sep 2018		Oct 2018	Total
				Planned	Conf/Alloc	Planned	Conf/Alloc	Planned	Planned
[G] Project Managers	0.35 FTE	Confirmed		45	45	62	58		168
Naomi Greenly					11				
System Administrator					11		16		

Group → User → Task	Aug 2018	Sep 2018	Oct 2018
	Availability	Availability	Availability
Project Managers	1998	1607	2245
<input checked="" type="checkbox"/> Diana Temple	147	121	153
<input type="checkbox"/> Dwain Cuttitta	0	0	7
<input checked="" type="checkbox"/> Chase Furler	76	51	75

# Reports and Dashboards

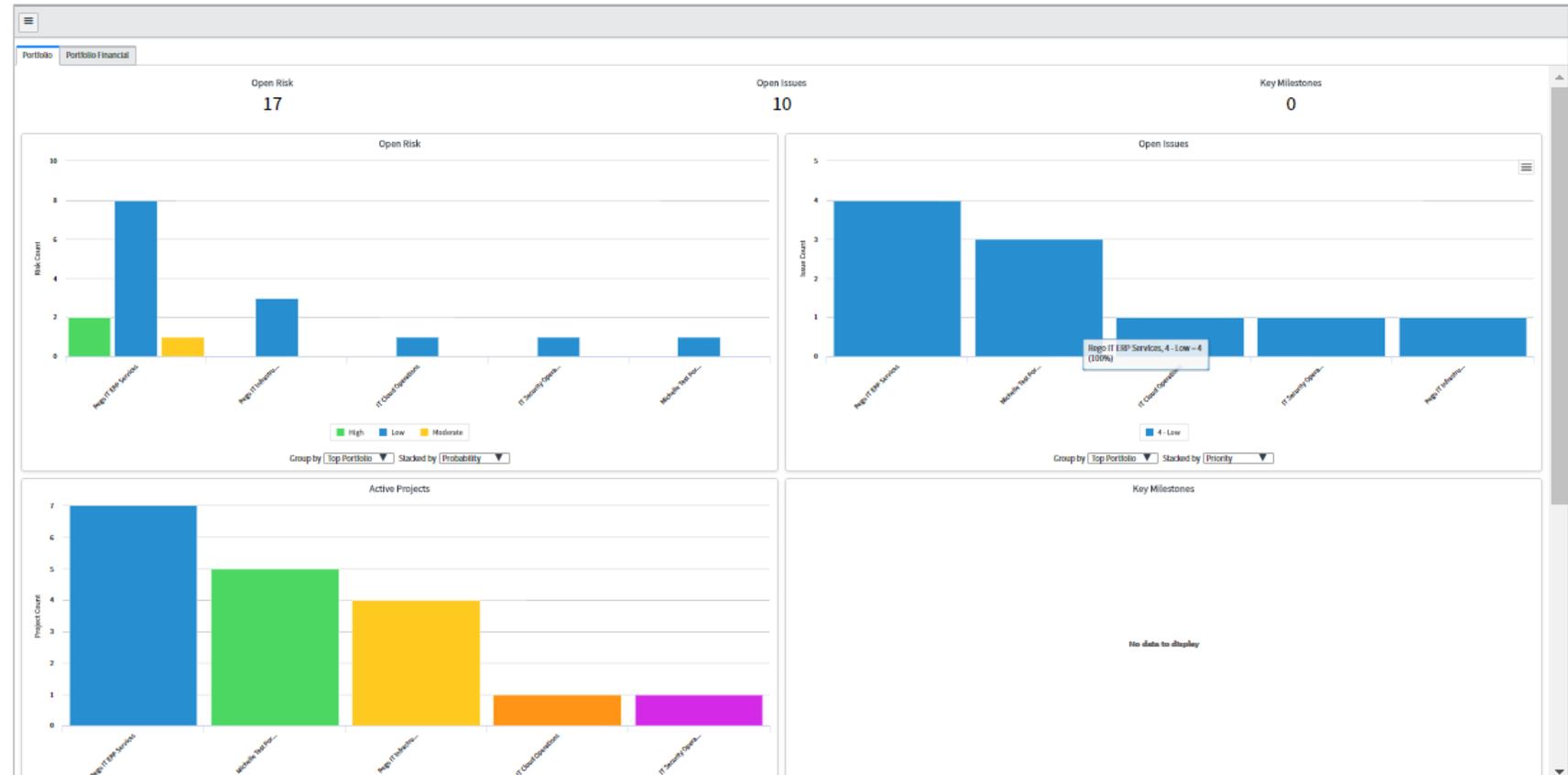
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# Portfolio Manager Dashboard

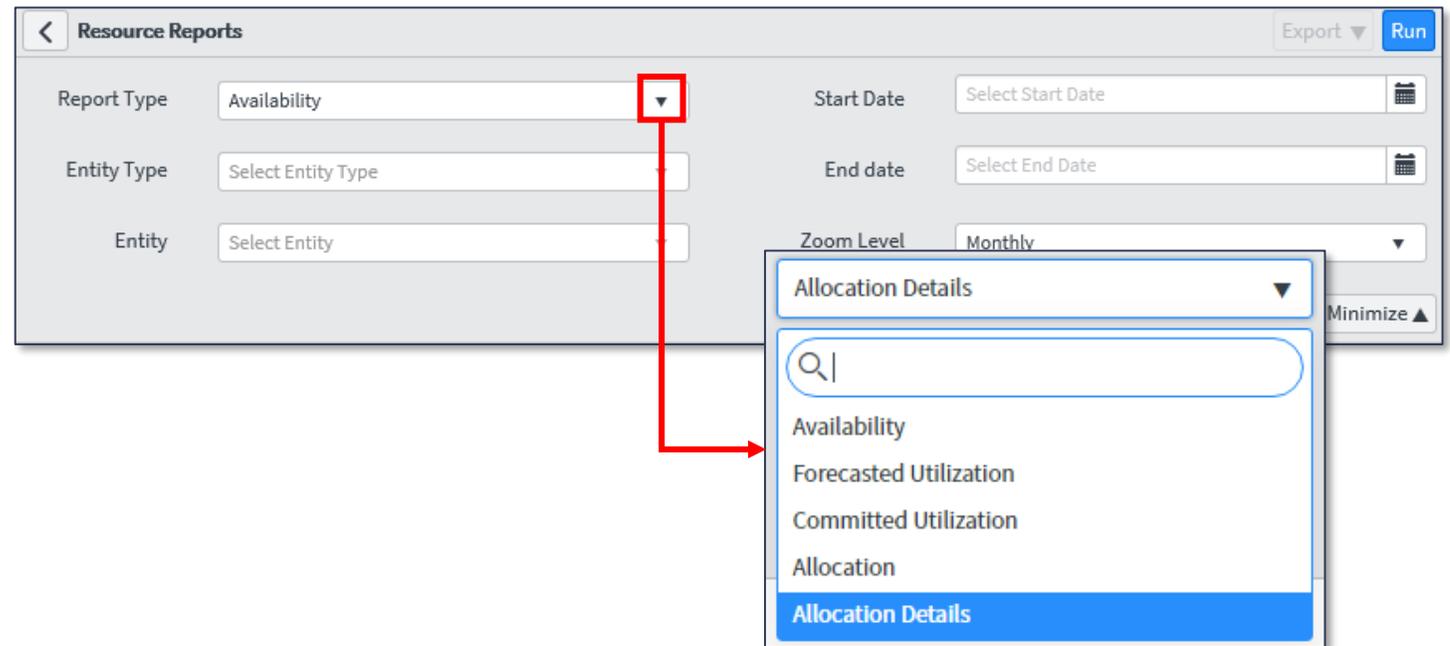
The Portfolio tab displays open risks, issues, active projects, key milestones, and demand pipeline.

Individual reports can be viewed by grouping and stacking based on the corresponding data sets.



# 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



# Resource Reports – New

- These resource reports are “stubs” of reports you can use as a starting point to develop your own resource reports.
- Navigate to **Resource > Resource Reports > Reports – New**.
- Reports can be published, shared, scheduled, added to a dashboard, printed or exported to PDF.

# Questions?



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# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at [pmi.org](http://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](mailto:info@regouniversity.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)