
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

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

Portfolio Planning

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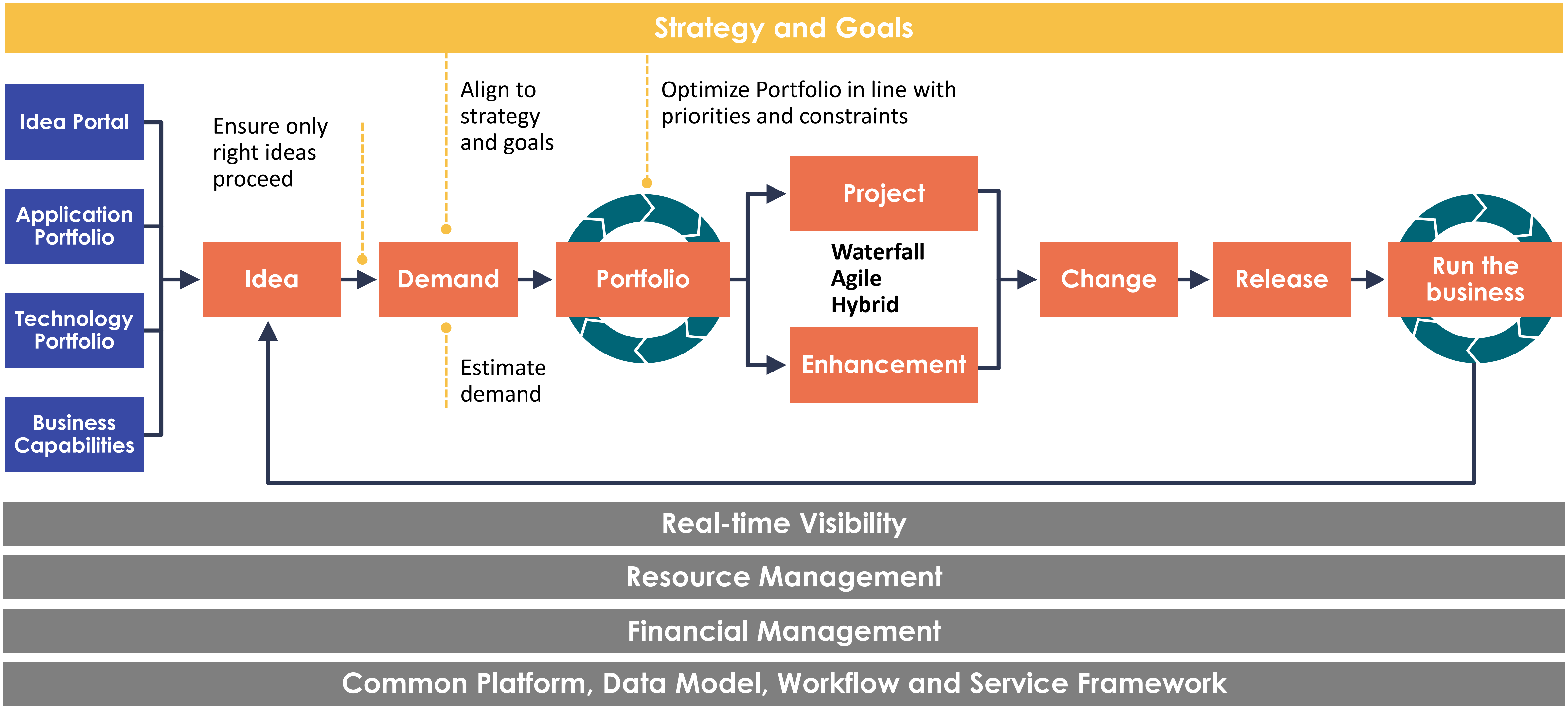
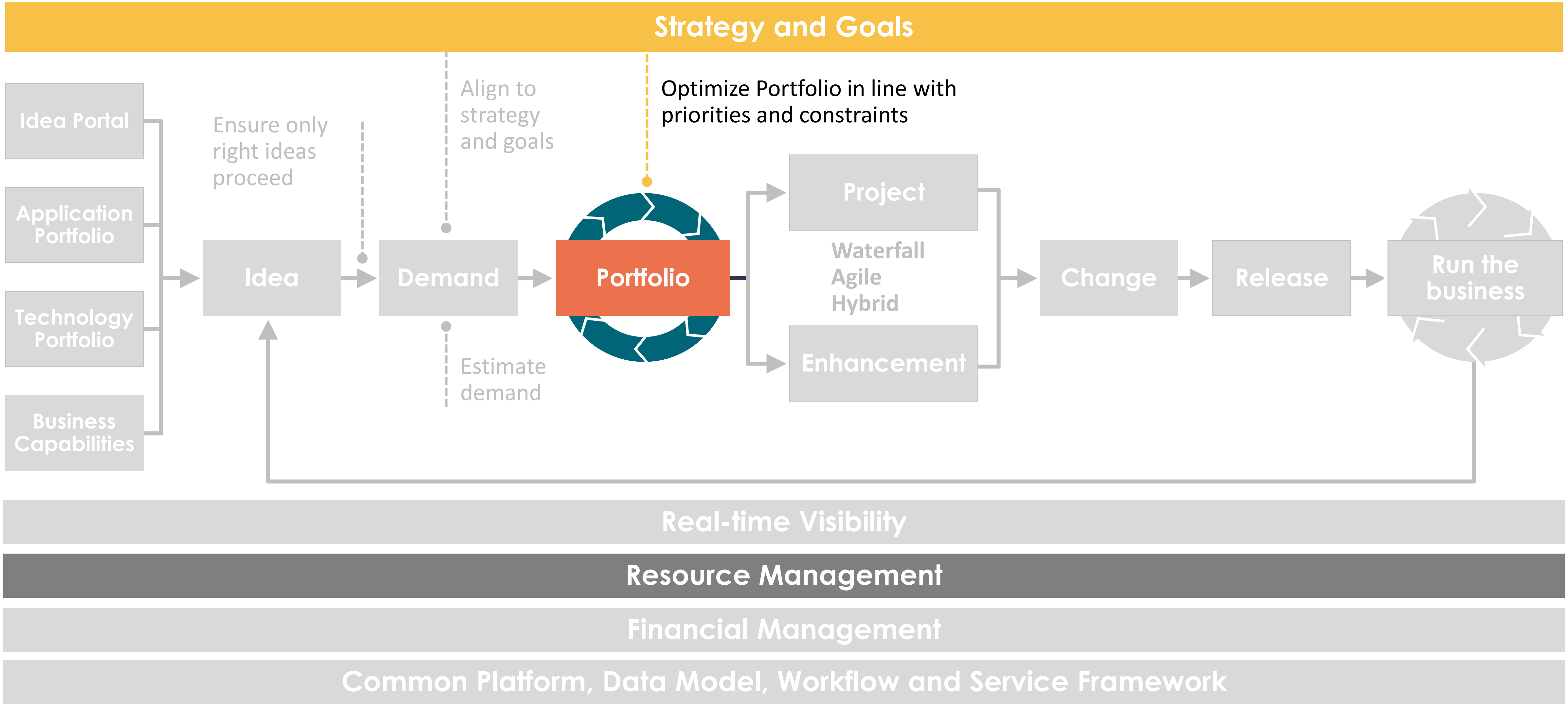
Let Rego be your guide.

ServiceNow PPM Flow



Today's Focus



What Is a Portfolio?

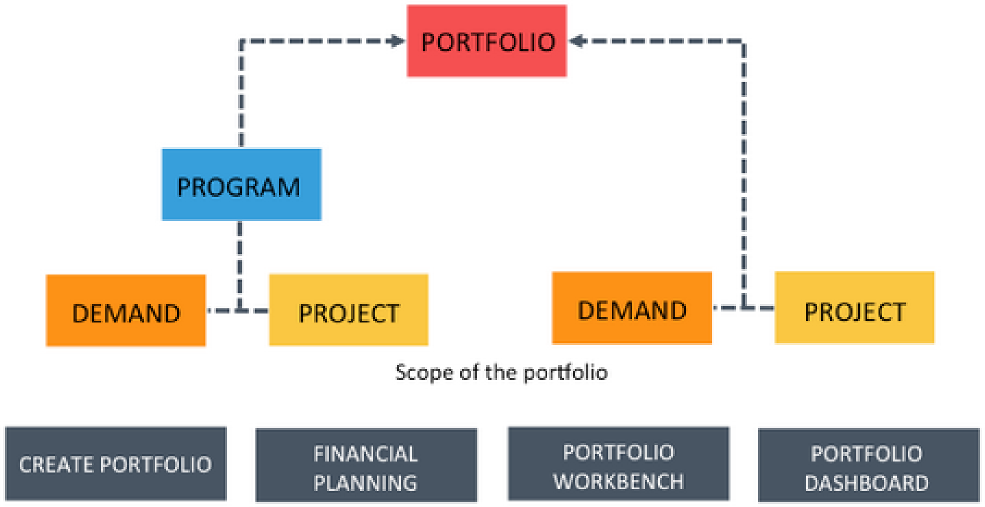
A collection of Demands and Projects aggregated for budgeting, approval, and performance tracking purposes. It exists to achieve one or more organizational strategies.

- 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.

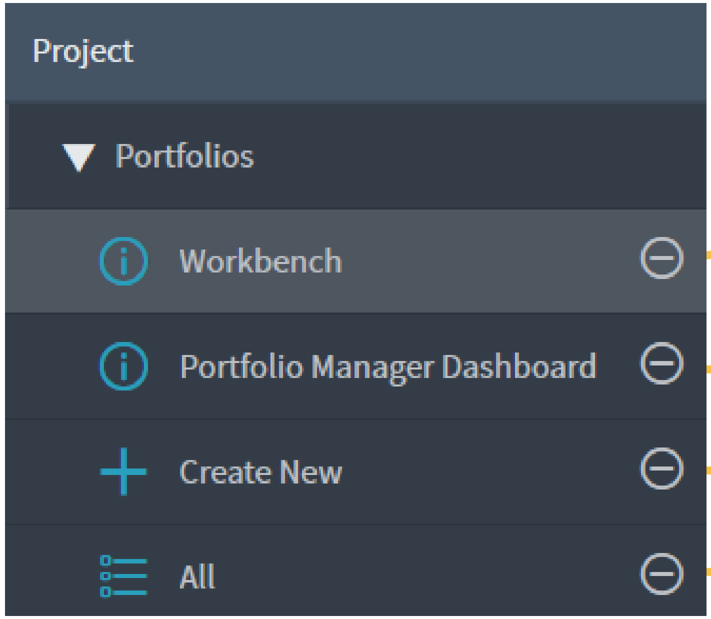
Overview of Portfolio Management

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

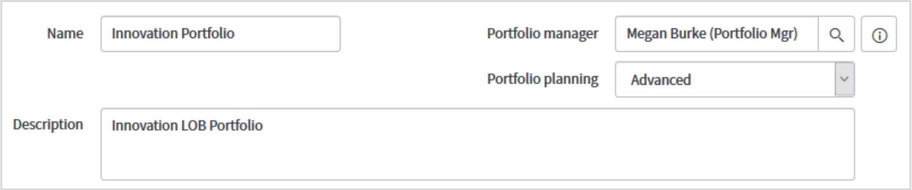
Central location to generate different graphical reports of Portfolios and financials for Portfolios **you** manage

Create a new Portfolio

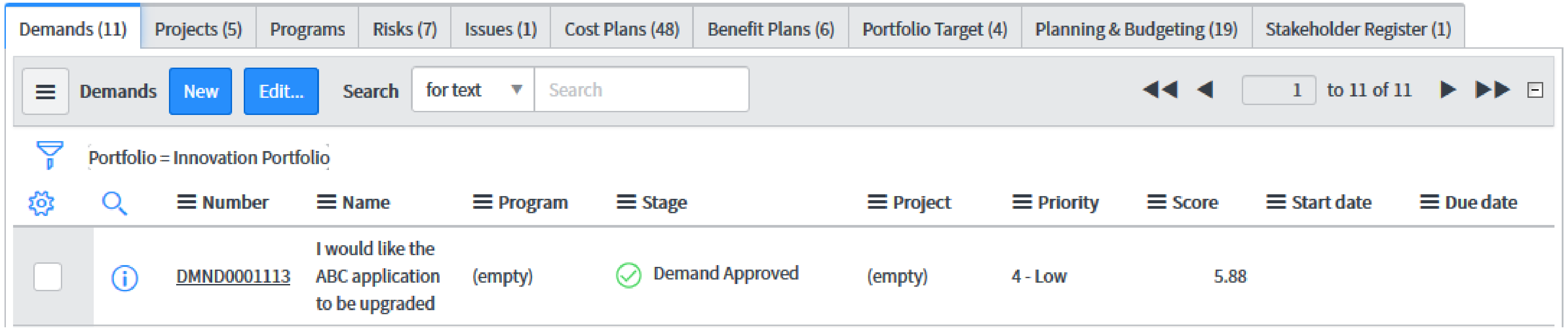
View all Portfolios in ServiceNow

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

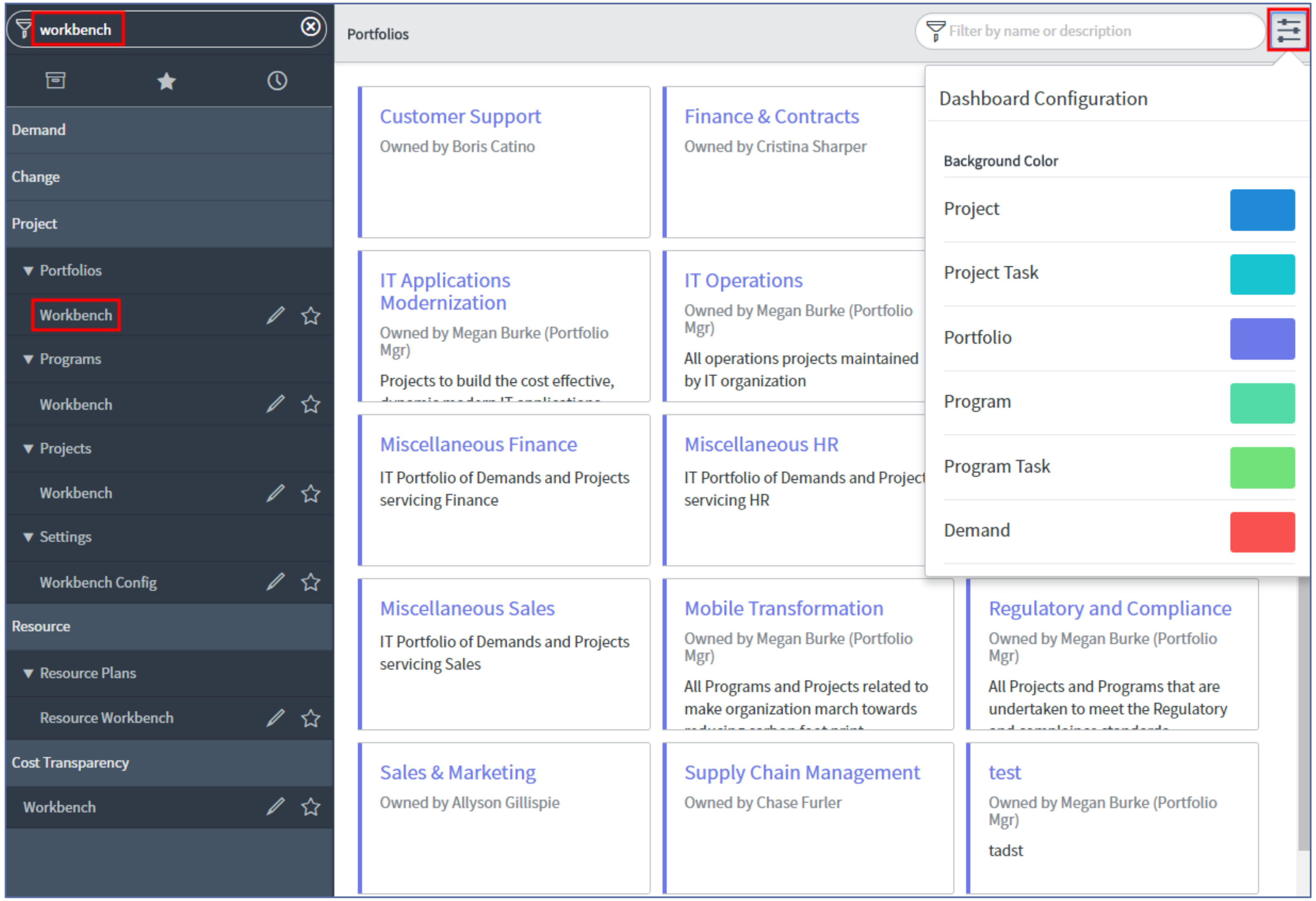


Portfolio Related Lists

- **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

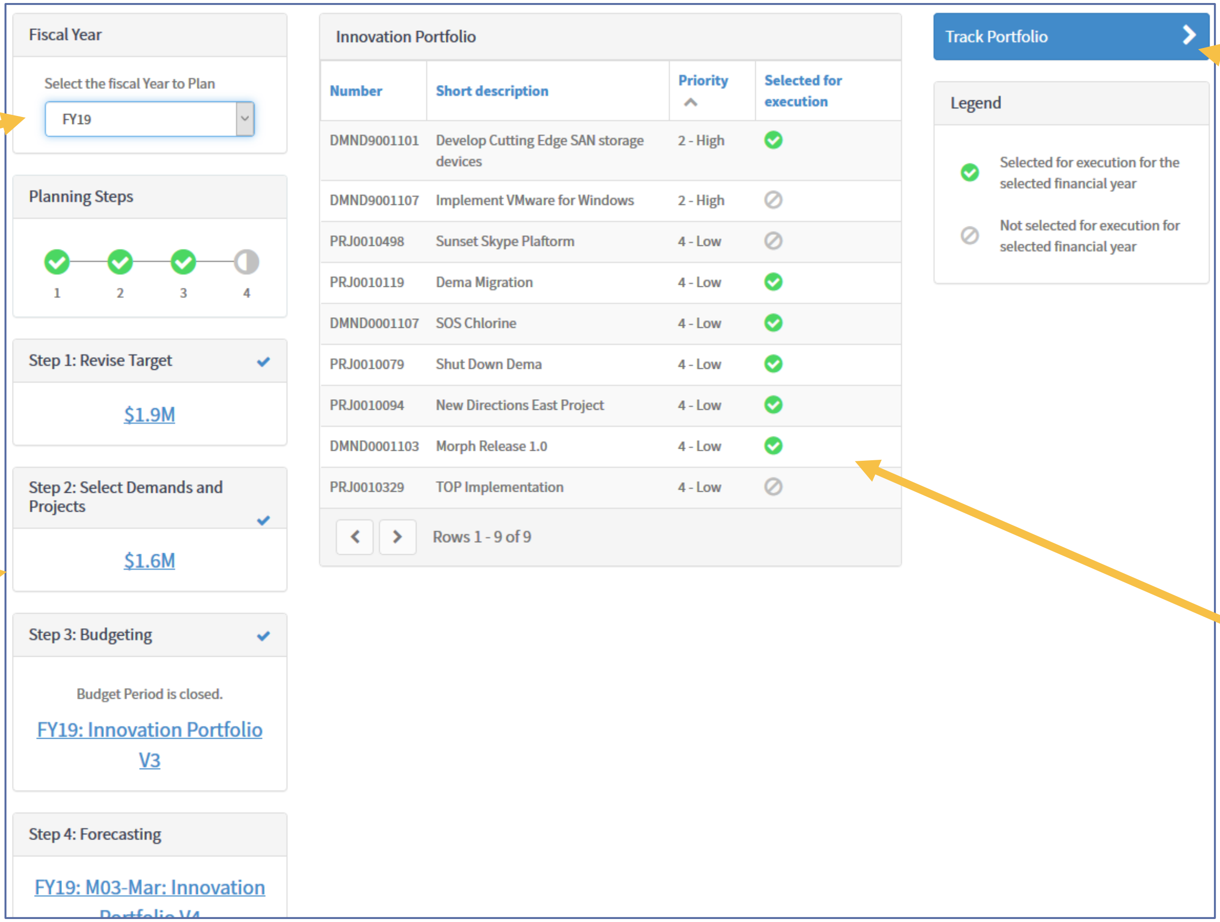
- In the Application navigator, enter "Workbench" and follow the path Project> Portfolio> to select **Portfolio Workbench**.
- You will see a card of all the available Portfolios to view.
- In the top right, click the configuration icon to select the colors for projects, tasks, Portfolios, and so on.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



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.



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

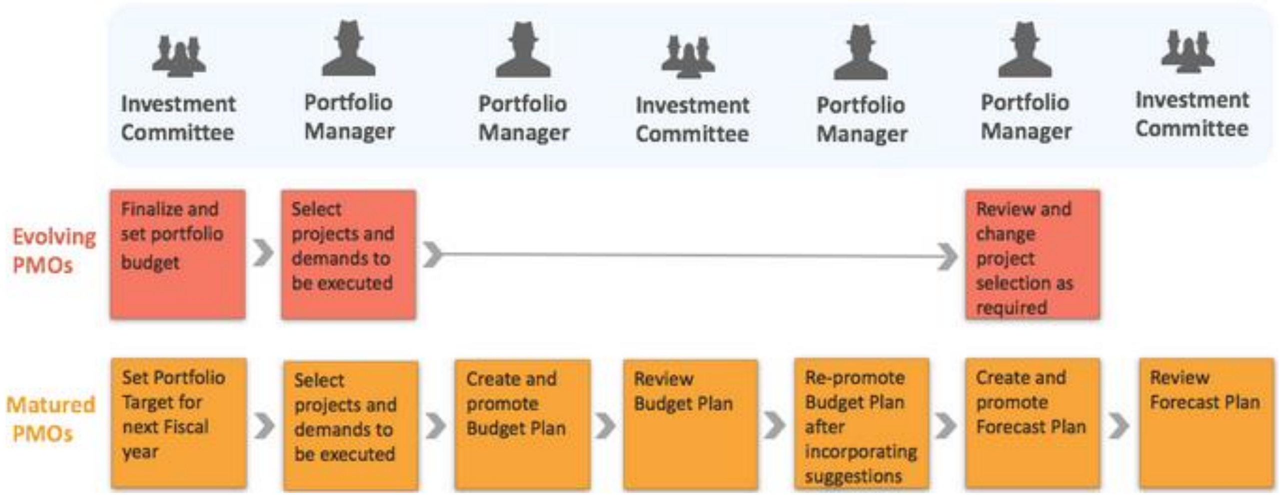
Portfolio Planning occurs in 2 or 4 steps within the Portfolio Workbench:

<u>Simple Planning:</u>

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

<u>Advanced Planning:</u>

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

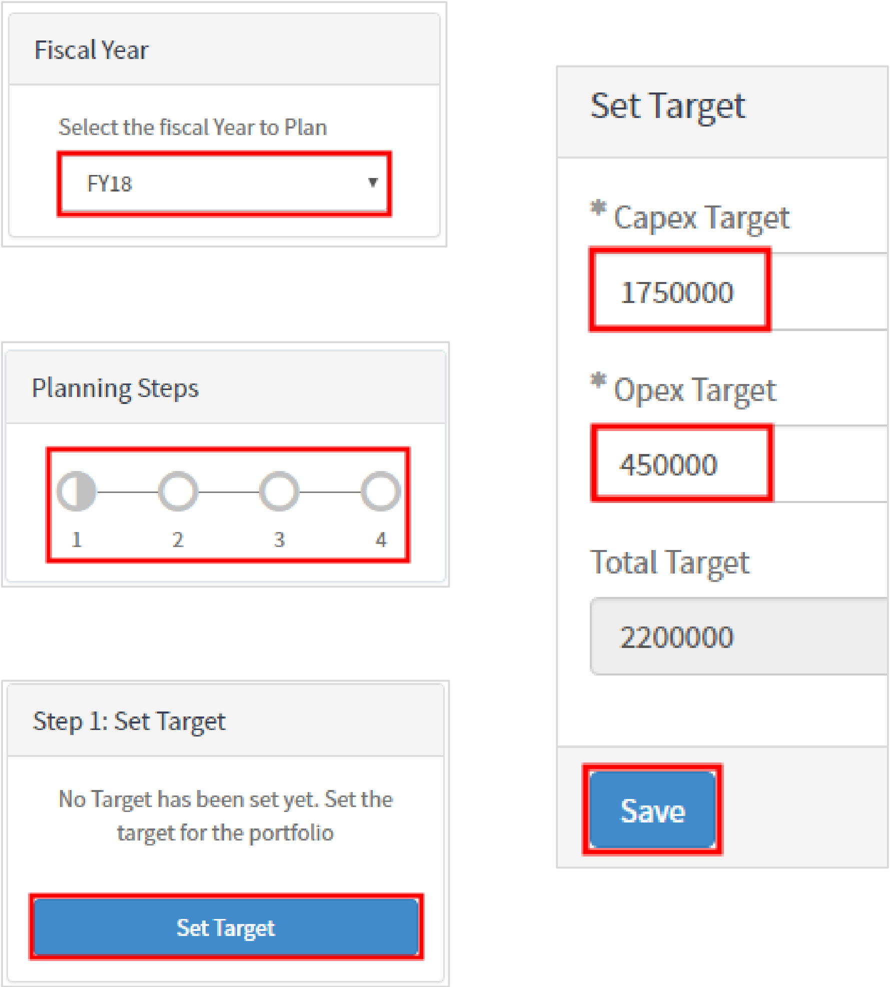


Step 1: Workflow

Prerequisites	Activities	Outcomes
• None	• Set the overall Capex and Opex targets for the Portfolio in the given FY	• Targets set within ServiceNow

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.



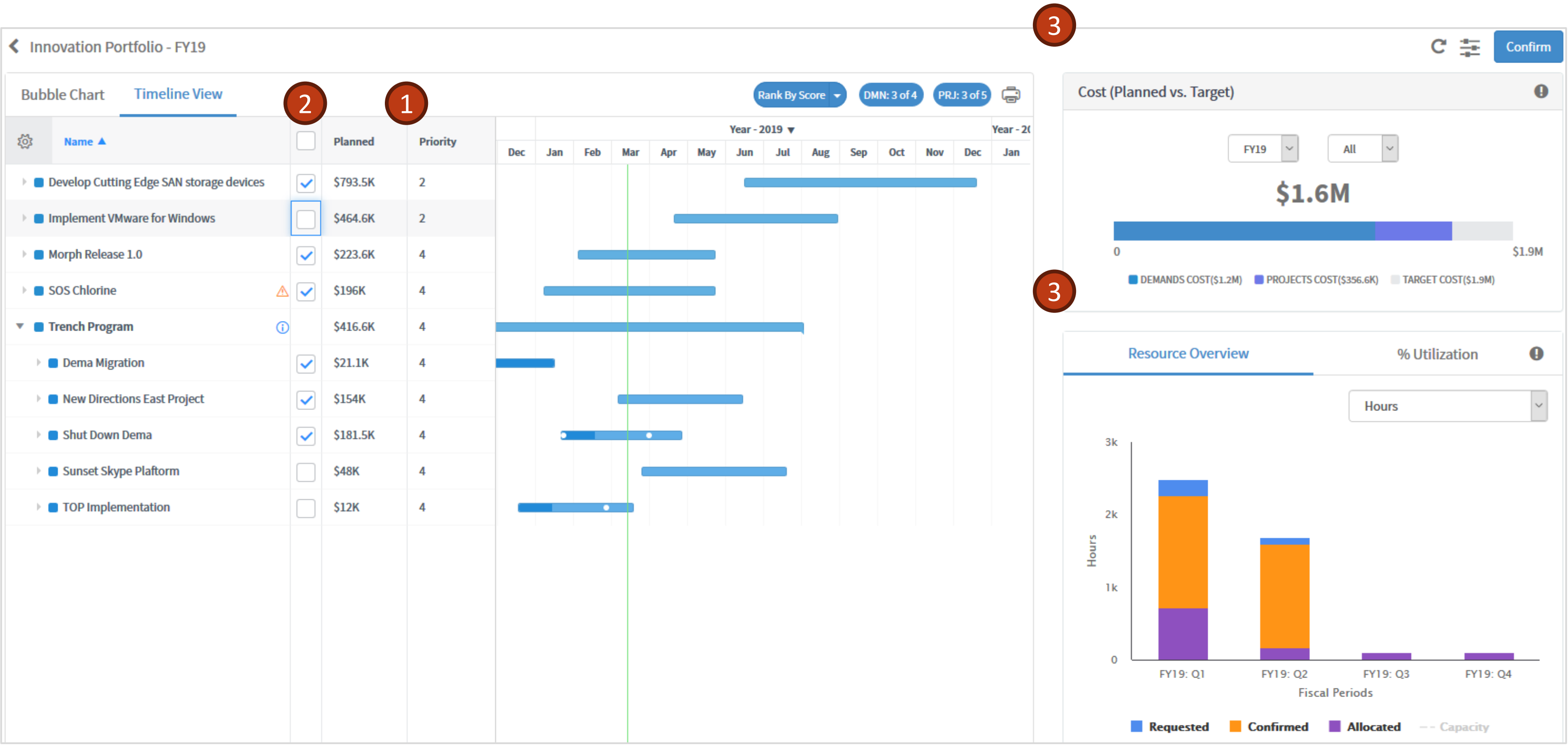
Step 2: Workflow

Prerequisites	Activities	Outcomes
• 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.

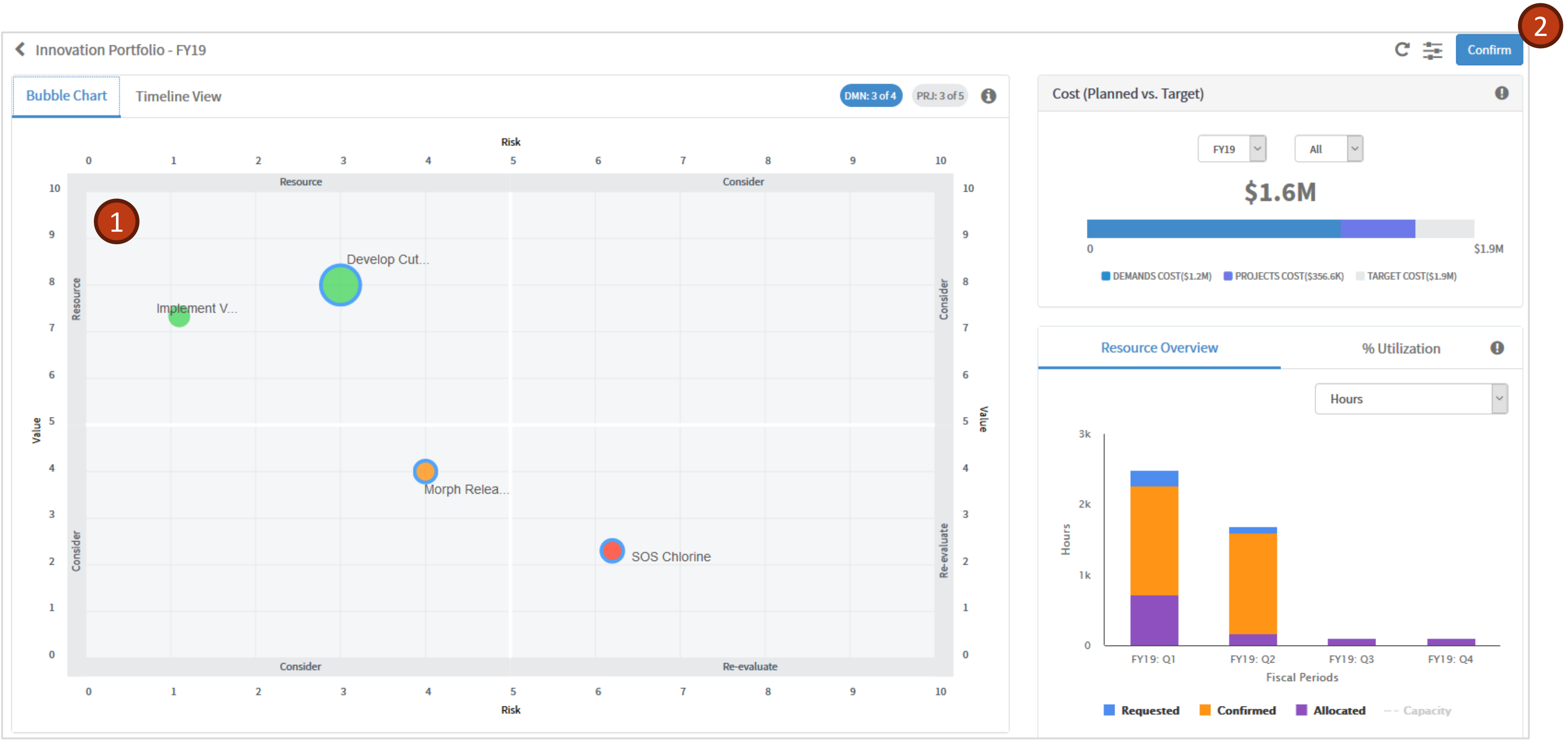
1. You can view the planned cost for each project or demand within the fiscal year, along with their priorities.
2. What-If analysis can be performed to determine the final selection of demands and projects for the Portfolio's fiscal budget.
3. As investments are selected/de-selected, Cost and Resource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

Prerequisites

- Steps 1 and 2 Complete
- Approved Demands/ Projects have accurate planned costs and budgets set
- Budget Period has been opened by Admin

Activities

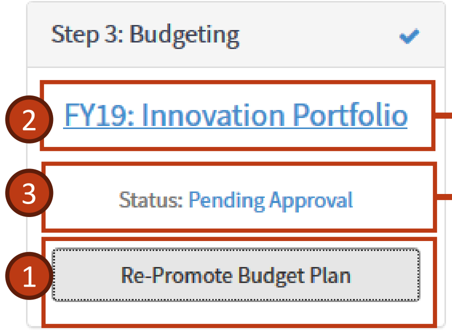
- Promote the Budget Plan which generates a Budget Plan
- Review the Budget Plan
- Adjust planned costs or budgets on the Demand/ Project records and re-promote the Budget Plan
- Approve or Reject the Budget Plan

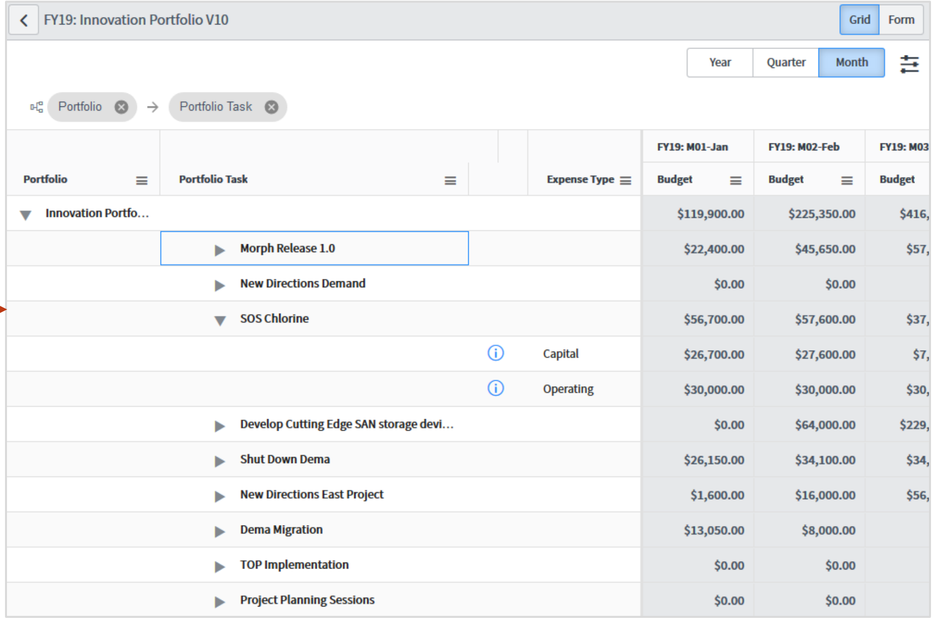
Outcomes

- Approved or Rejected Budget Plan
- Once all Portfolio budgets are approved, Admin will close Budget Period

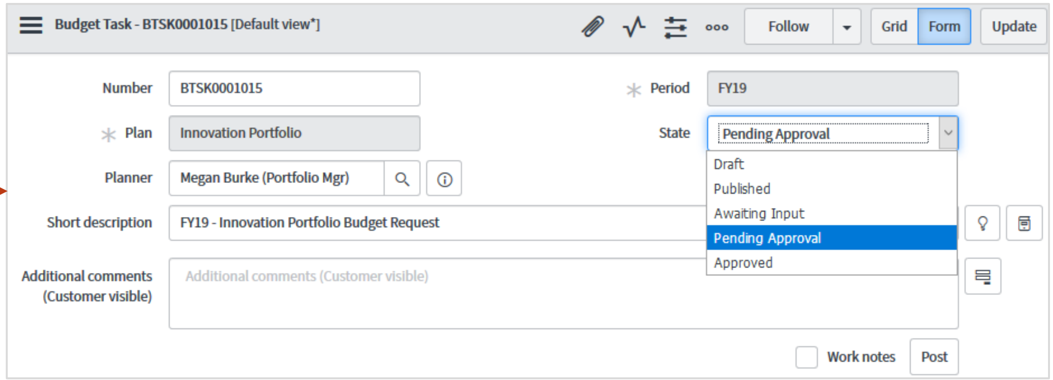
Step 3: Set and Approve Budgets

1. Promote the Budget Plan which takes the planned and budget costs from Step 2.
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.
3. Approve/ Reject the Budget Plan. One this happens, Budget cost fields on Demands/ Projects become read-only.





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	



Step 4: Workflow

Prerequisites

- Steps 1, 2, 3 complete
- Approved Demands/ Projects have updated planned costs and budgets set (from the Demand/Project records themselves)
- Forecast Period has been opened by Admin

Activities

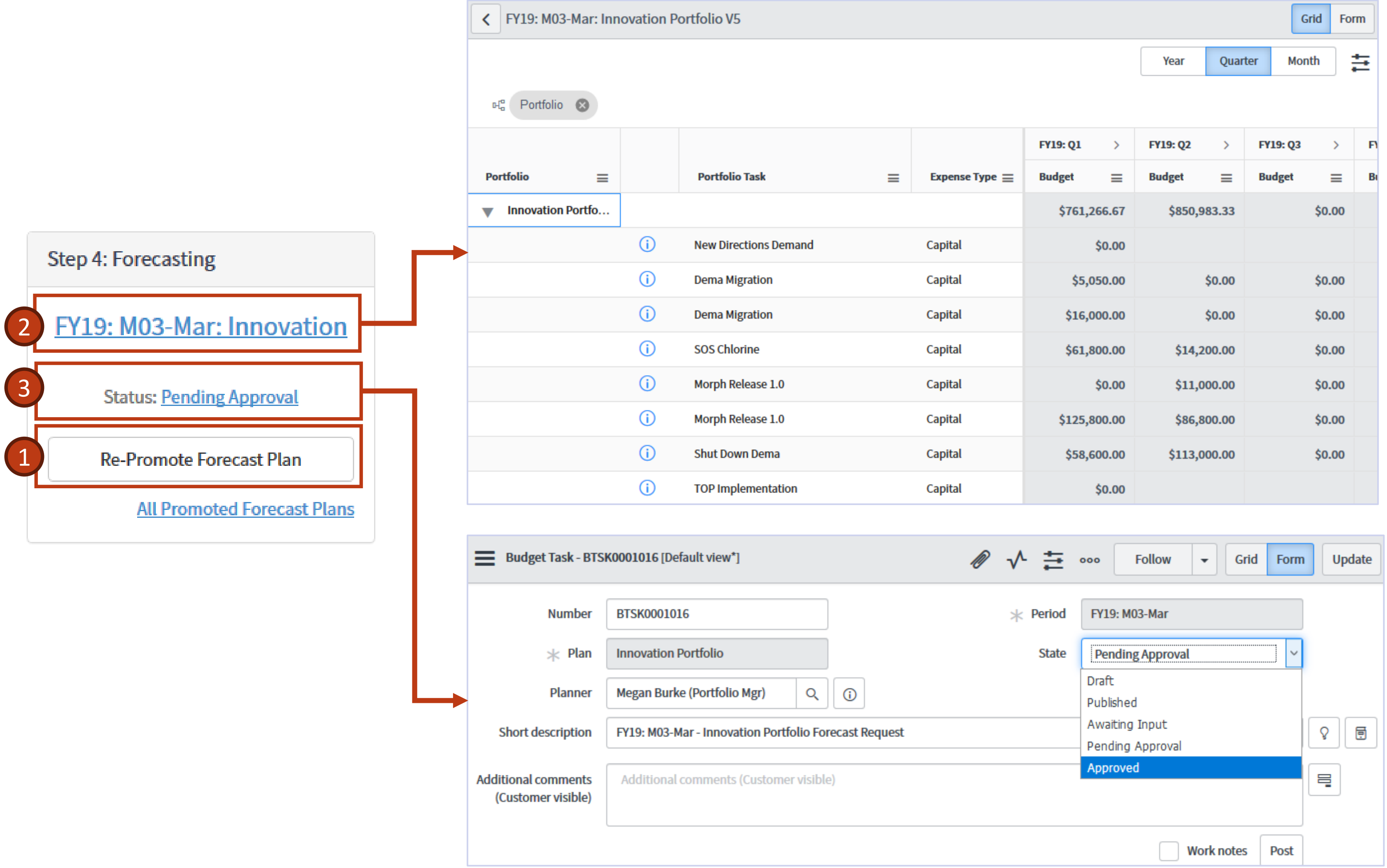
- Promote the Forecast Plan which generates a Forecast Plan
- Review the Forecast Plan
- Adjust planned costs or budgets on the Demand/ Project records and re-promote the Forecast Plan
- Approve or Reject the Forecast Plan

Outcomes

- Approved or Rejected Forecast Plan
- Once all Portfolio budgets are approved, Admin will close Forecast Period

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.



Resource Management

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

Planning

- Used for initial estimation
- Does not show up on RM dashboards

Requested

- Considered an official request for resourcing
- Not editable by PMs; Need to use “Request Change” to edit
- Appears on RMs dashboard for consideration and assignment

Confirmed

- Tentative commitment or “soft” booked
- RP can still be modified, but moves back to Requested
- Resource Allocation Breakdowns created

Rejected

- Denotes that the RM was unable to fulfill
- RP becomes editable by PMs

Allocated

- Firm commitment or “hard” booked
- RP can only have dates extended
- Creates or updates Resource Allocation Breakdowns

Completed

- Marks RP as Completed and locks all editing
- Completes with the dates/allocations as is

Cancelled

- Marks RP as Cancelled and locks all editing
- Updates end date of allocations to current date

Requesting and Booking Resources

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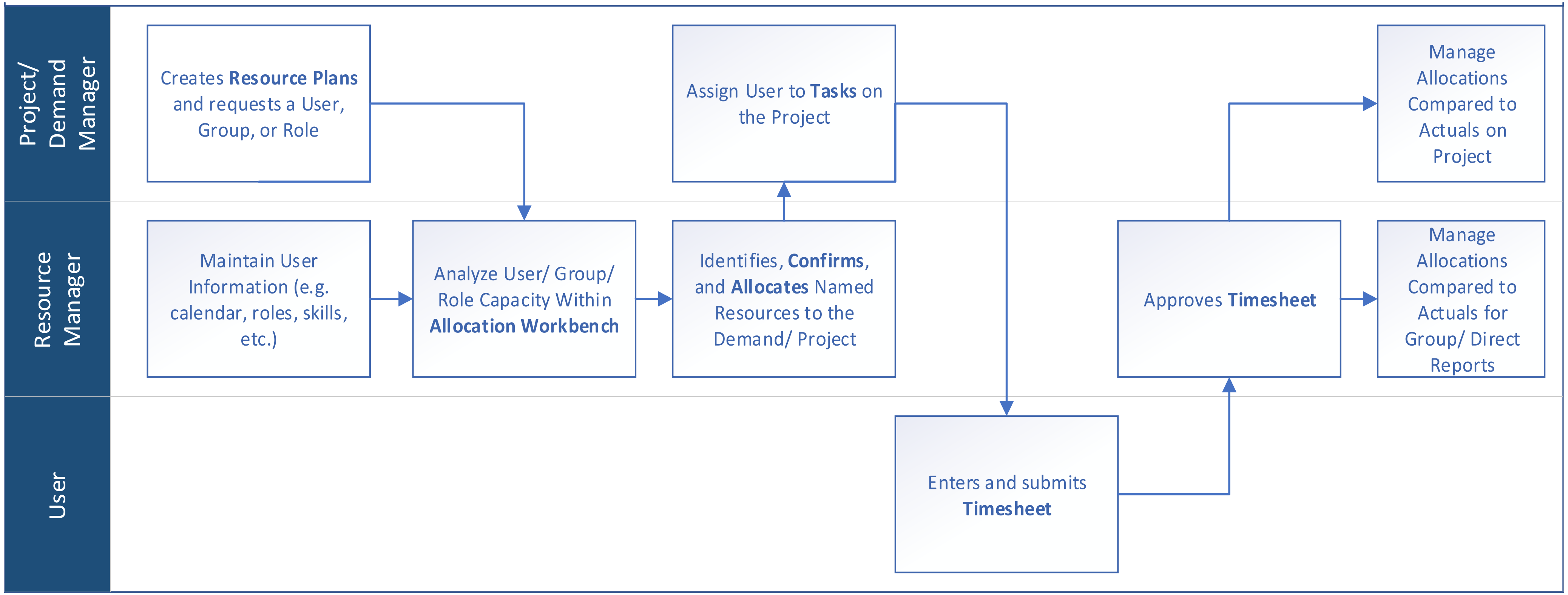
Typical Resource Planning Process (1)



Typical Resource Planning Process (2)

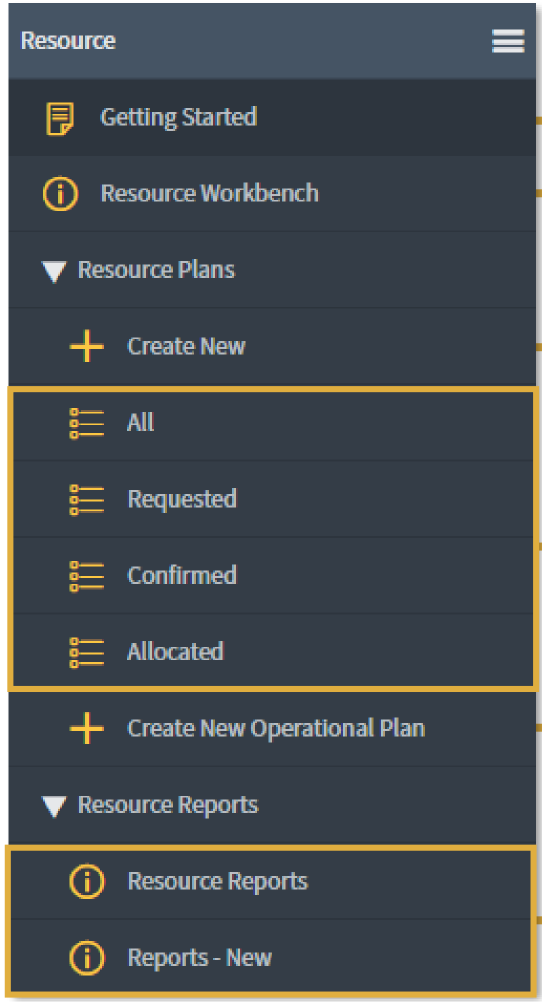
1. The Demand/ Project Manager requests resources by creating Resource Plans that ask for a specific group, user, or role to perform required tasks.
2. Once the Demand/ Project Manager is ready to request the resource, they change the **State** of the Resource Plans from **Planning** to **Requested.** 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

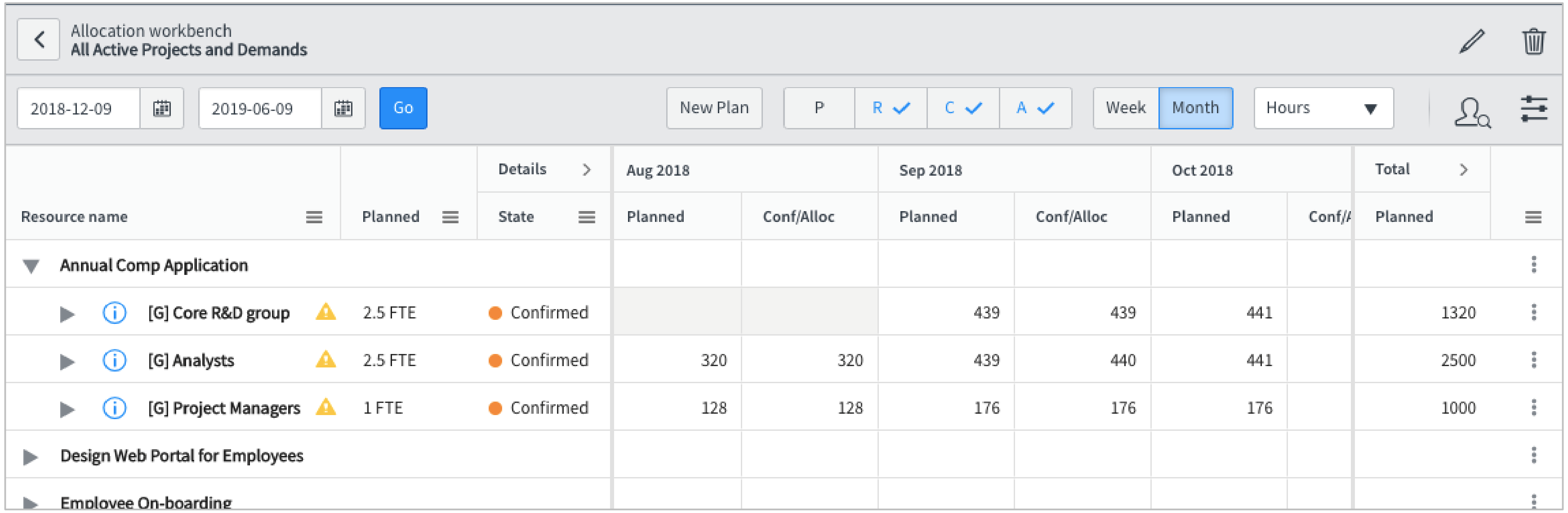
Lists of Resource Plans in different States

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



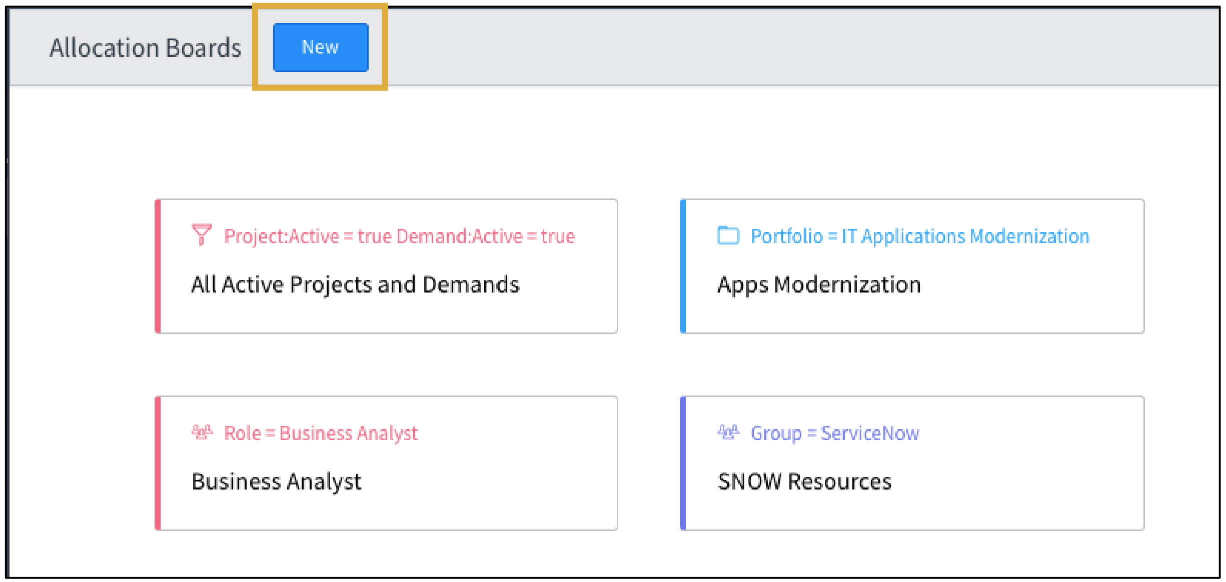
Resource Workbench Process

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

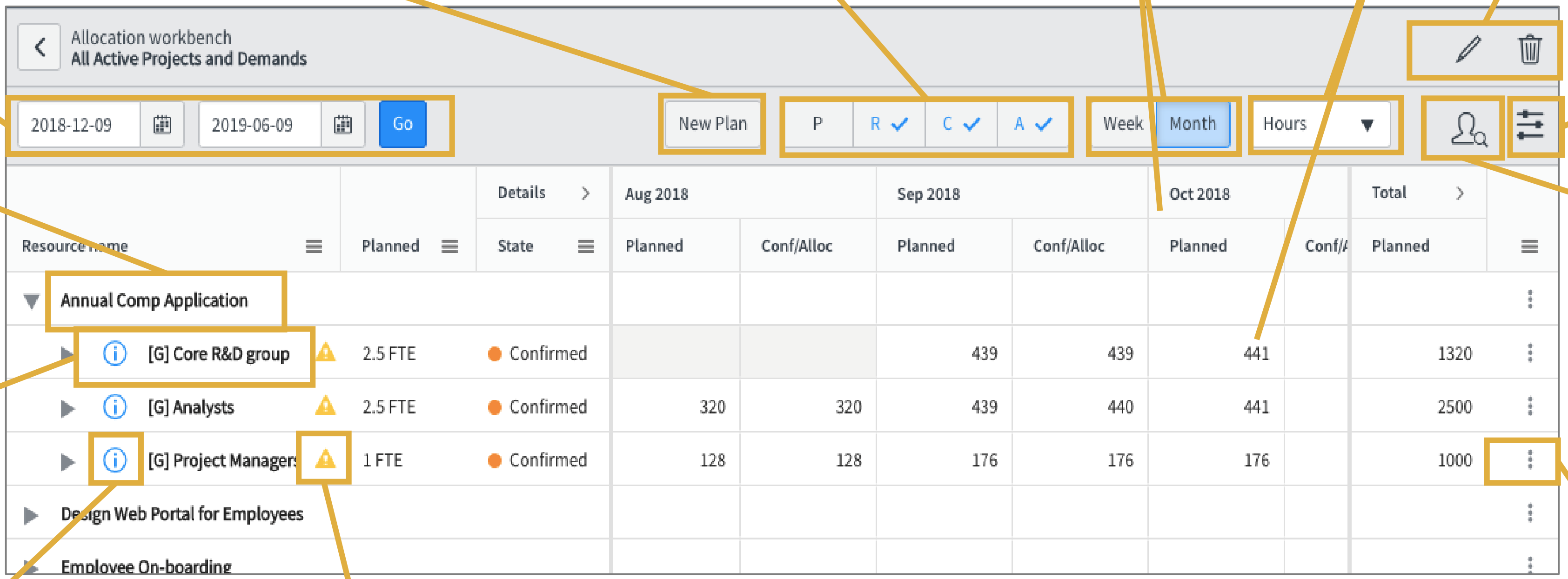
Edit or Delete the Allocation Board

Configure Columns Viewed

Project/ Demand Name

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

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



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

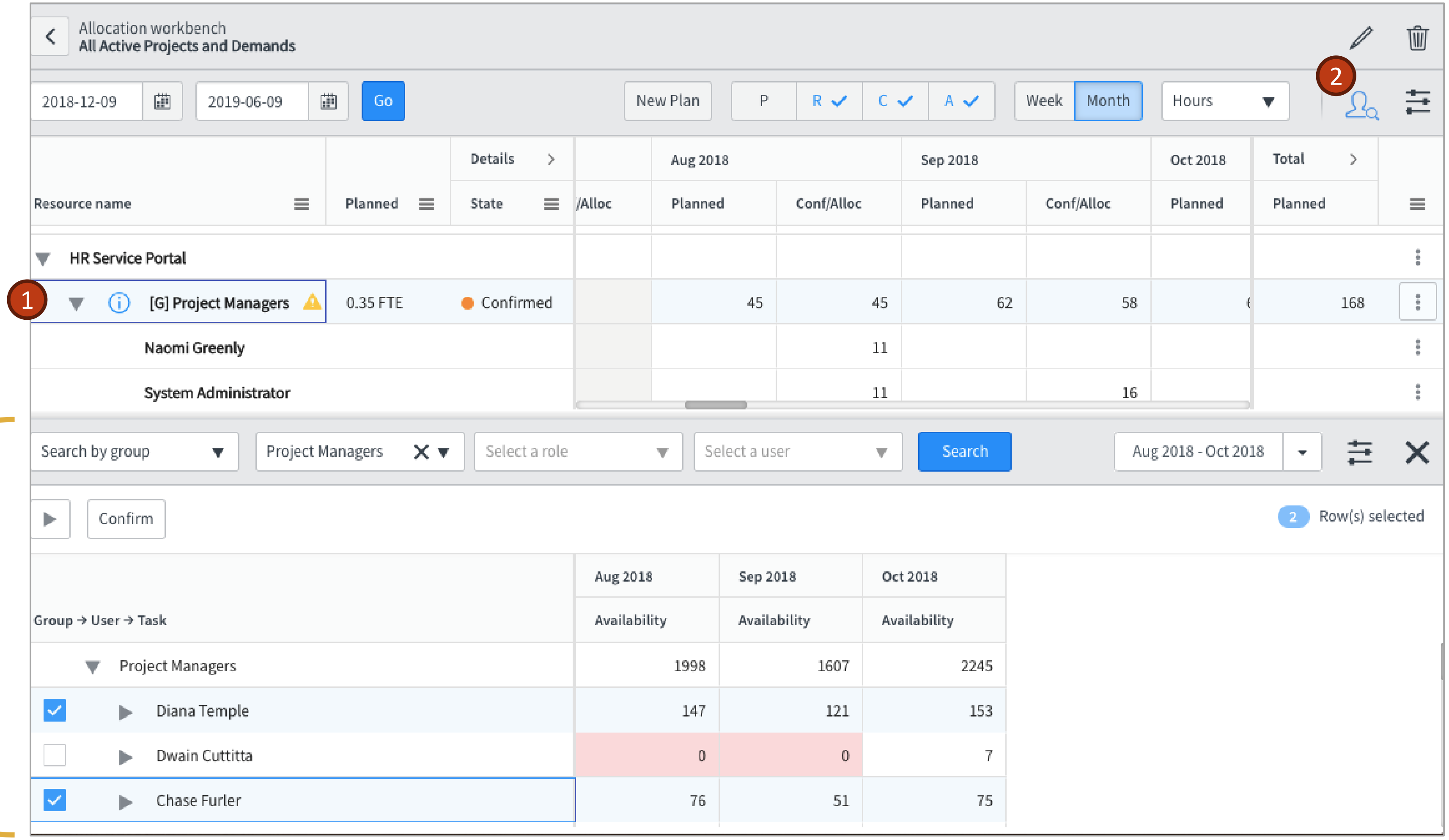
Click to **Edit** the Plan

Hover to see warning messages

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



Reports and Dashboards

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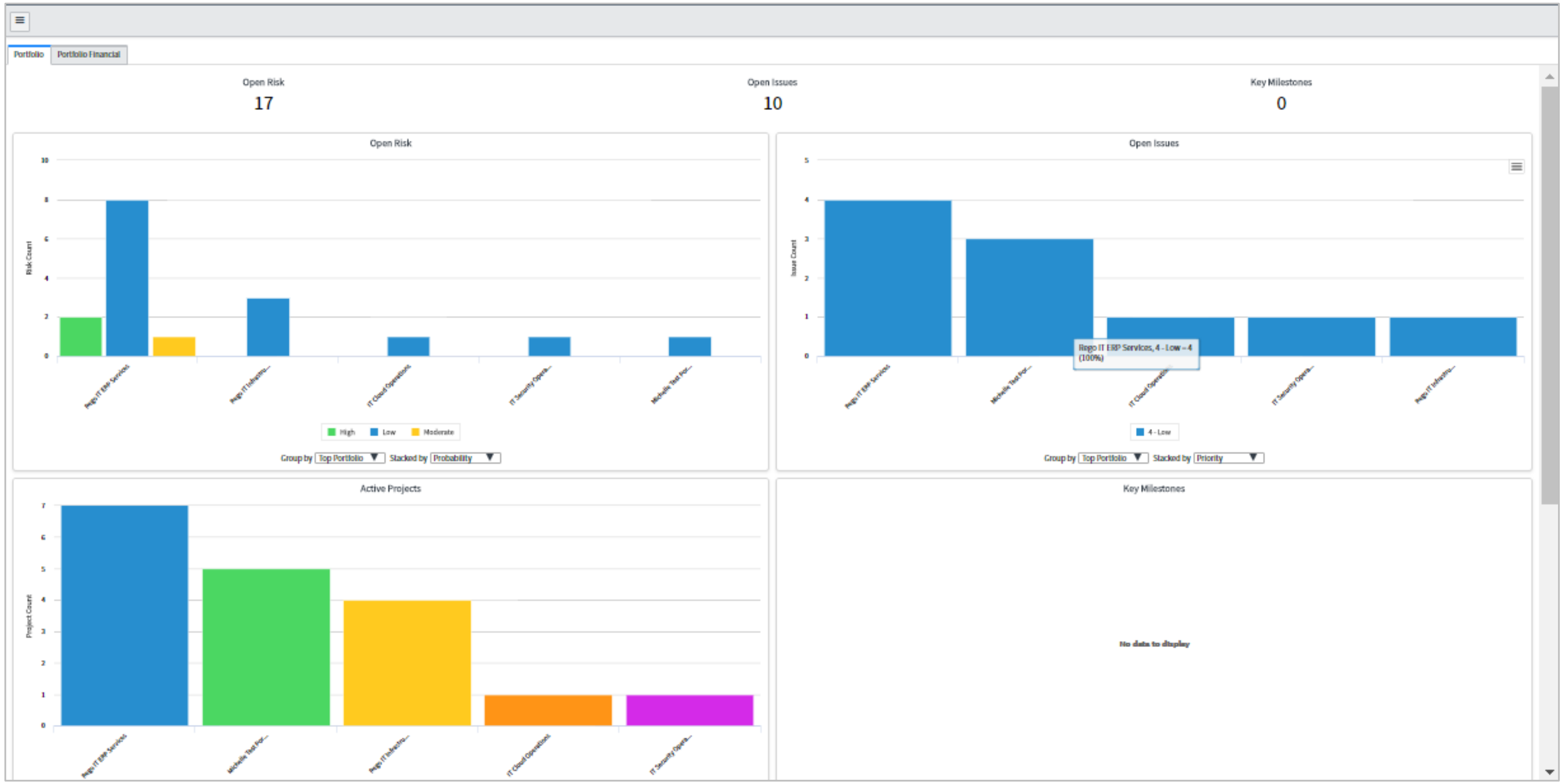
Portfolio Manager Dashboard

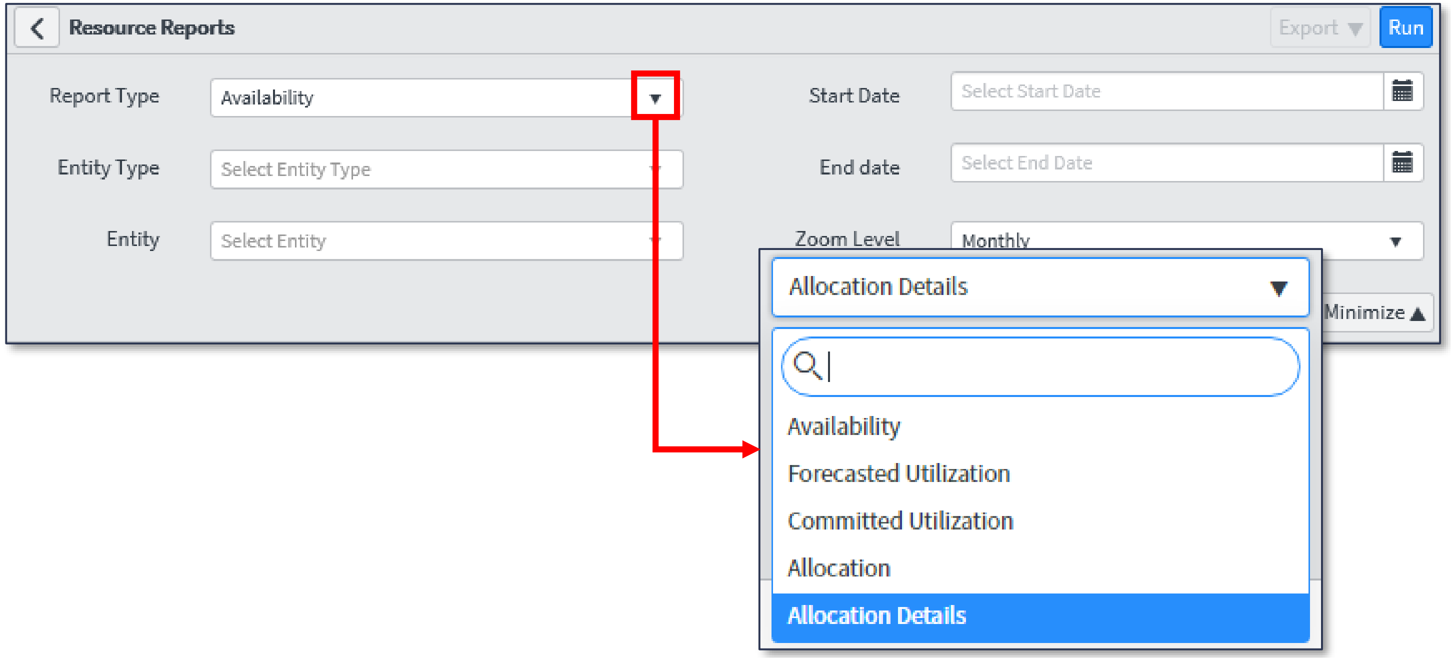
The Portfolio tab displays open risks, issues, active projects, key milestones, and demand pipeline.

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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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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