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# Lab Guide

## PPM 101

## Managing Waterfall and Agile Methodologies with Project Workbench

Vani Duddilla & Bradly Anderson

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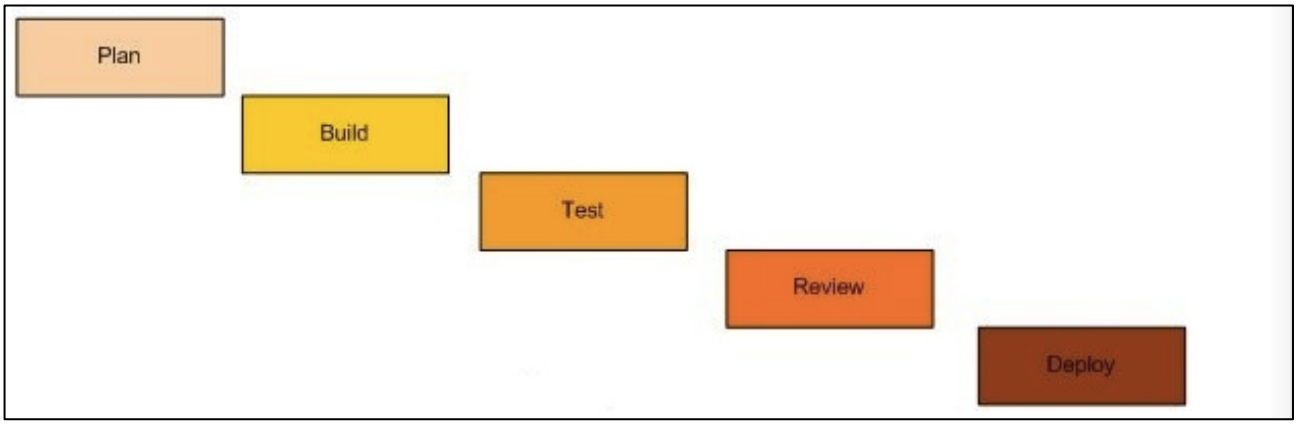
# Lab Goal

This lab explains how Project Workbench helps you create collaborative space for project team members to engage and work in a powerfully simple screen. Explore how to manage hybrid projects through Water-SCRUM-Fall.

**Lab 1.0 Overview**

This section explains

- Concepts of Waterfall, Scrum and Water-SCRUM-Fall Methodology
- Waterfall Methodology: Waterfall Development is another name for the more traditional approach to software development. It is called **waterfall,** as one Phase needs to be completed before moving to another Phase.

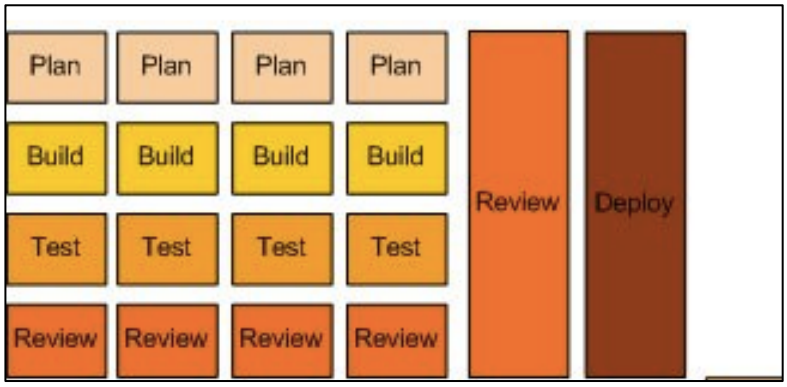



## Agile (SCRUM) Methodology

Scrum is an iterative and incremental agile software development framework for managing product development. It defines "a flexible, holistic product development strategy where a development team works as a unit to reach a common goal," challenges assumptions of the "traditional, sequential approach" to product development, and enables teams to self-organize by encouraging physical co-location or close online collaboration of all team members, as well as daily face-to-face communication among all team members and disciplines in the project.

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The Scrum process is suited for projects with rapidly changing or highly emergent requirements. Scrum software development progresses via a series of iterations called sprints, which last from one to four weeks.

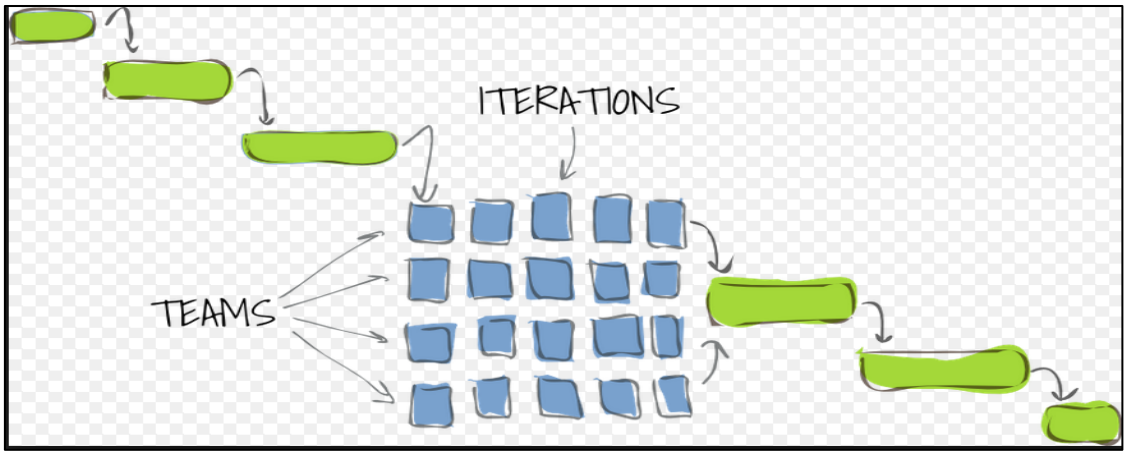



Also, what is really important – Scrum recognizes the fact that during a project the customers can change their requirements (or the way how the problem is seen can be changed, because actual development unveils some additional, previously unknown facts).

## Water-Scrum-Fall

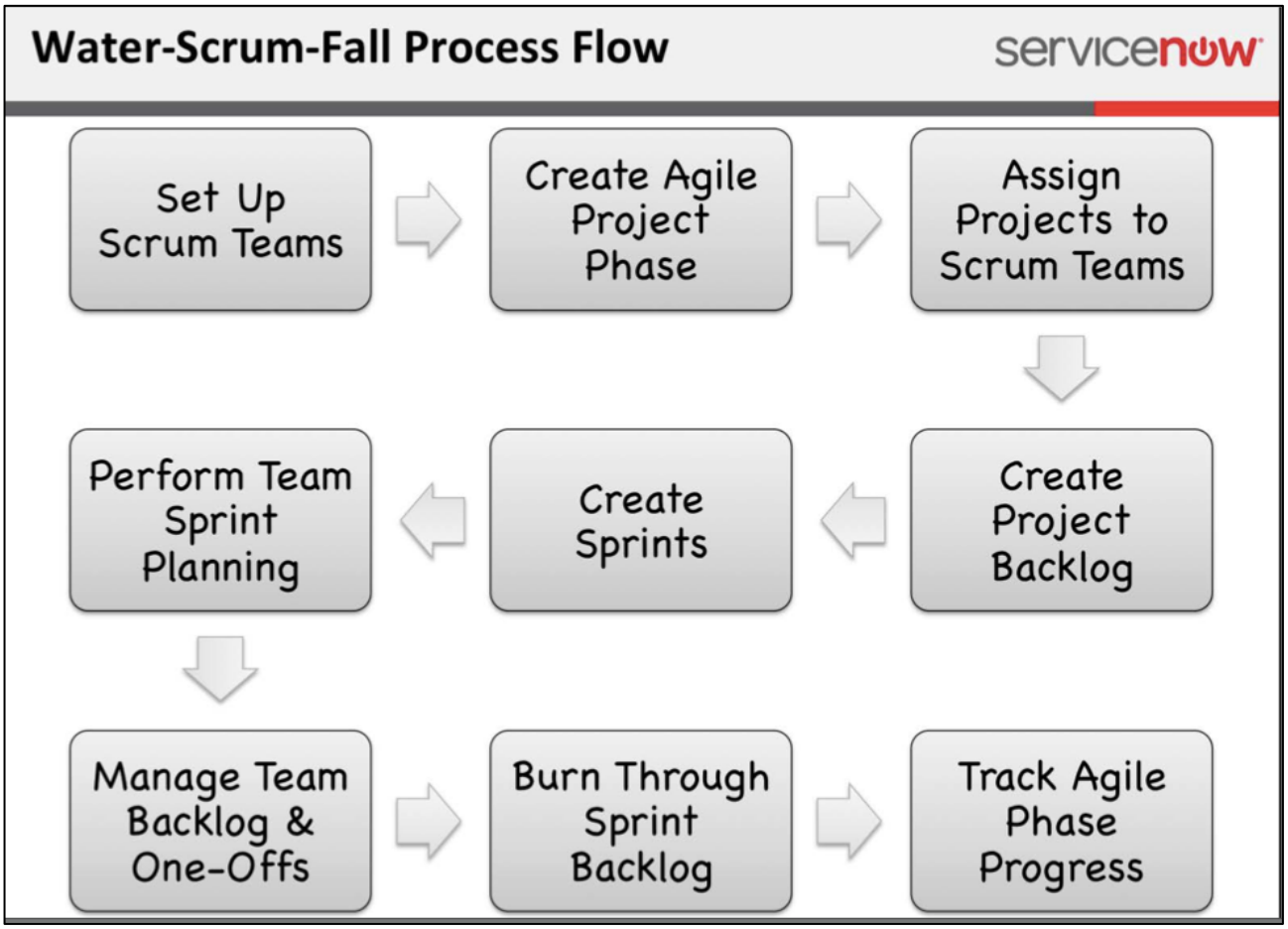
A flexible approach that embraces both traditional and Agile development principles allows development teams to use whatever practices and techniques best meet the needs of the problem being solved. Many organizations use Agile principles and Scrum communication techniques in their day-to-day product development but employ traditional waterfall methodologies for planning, budgeting or documenting the project's progress.

The need for flexibility has also given rise to a movement called DevOps, an approach that blends the tasks performed by a company's development and systems operations team.




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## Water-SCRUM-Fall in Servicenow




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# Lab Goal

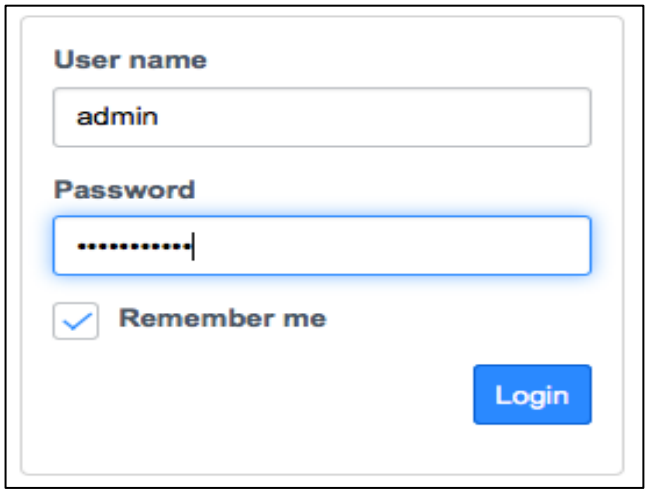
This lab explains how to create and manage from Project Workbench.

- Lab 2.1: Create a Project from Workbench
- Lab 2.2: Copy Template to create Work Breakdown Structure
- Lab 2.3: Manage Tasks Start and End dates

**Lab 2.0 Create and Manage Project in Workbench**

## Log on to Your Training Instance

1. Navigate to the unique instance URL provided to you.
2. Log on with provided credentials.



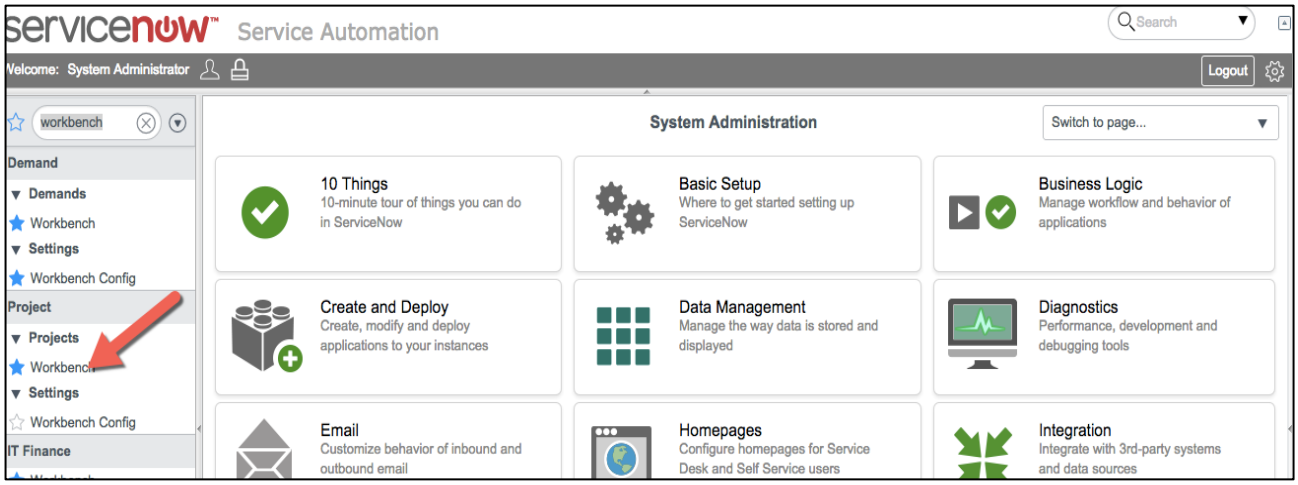

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## Lab 2.1 Create Project From Workbench

This lab explains how to create the new project from workbench.

1. While logged into your lab instance, enter **workbench** in the **navigator** to locate the **Workbench Application** under Project.

2. Click the **Workbench** module to open it.

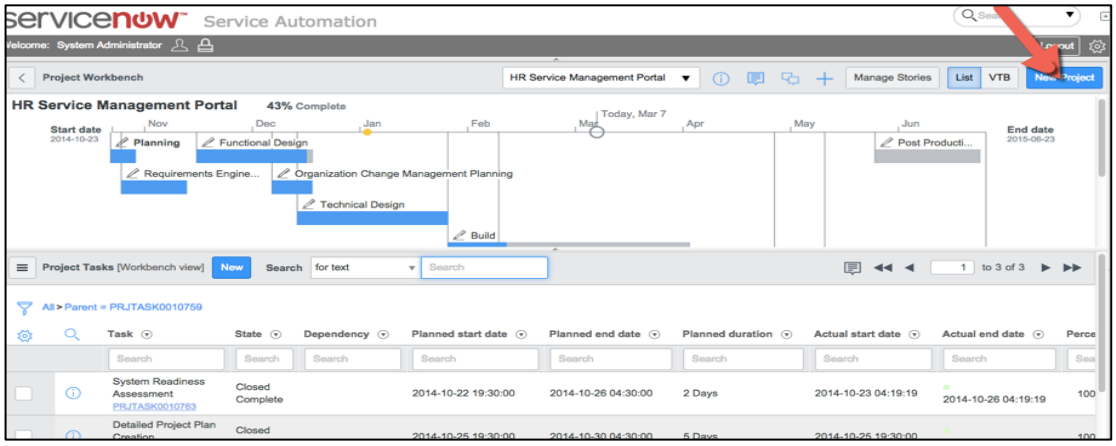


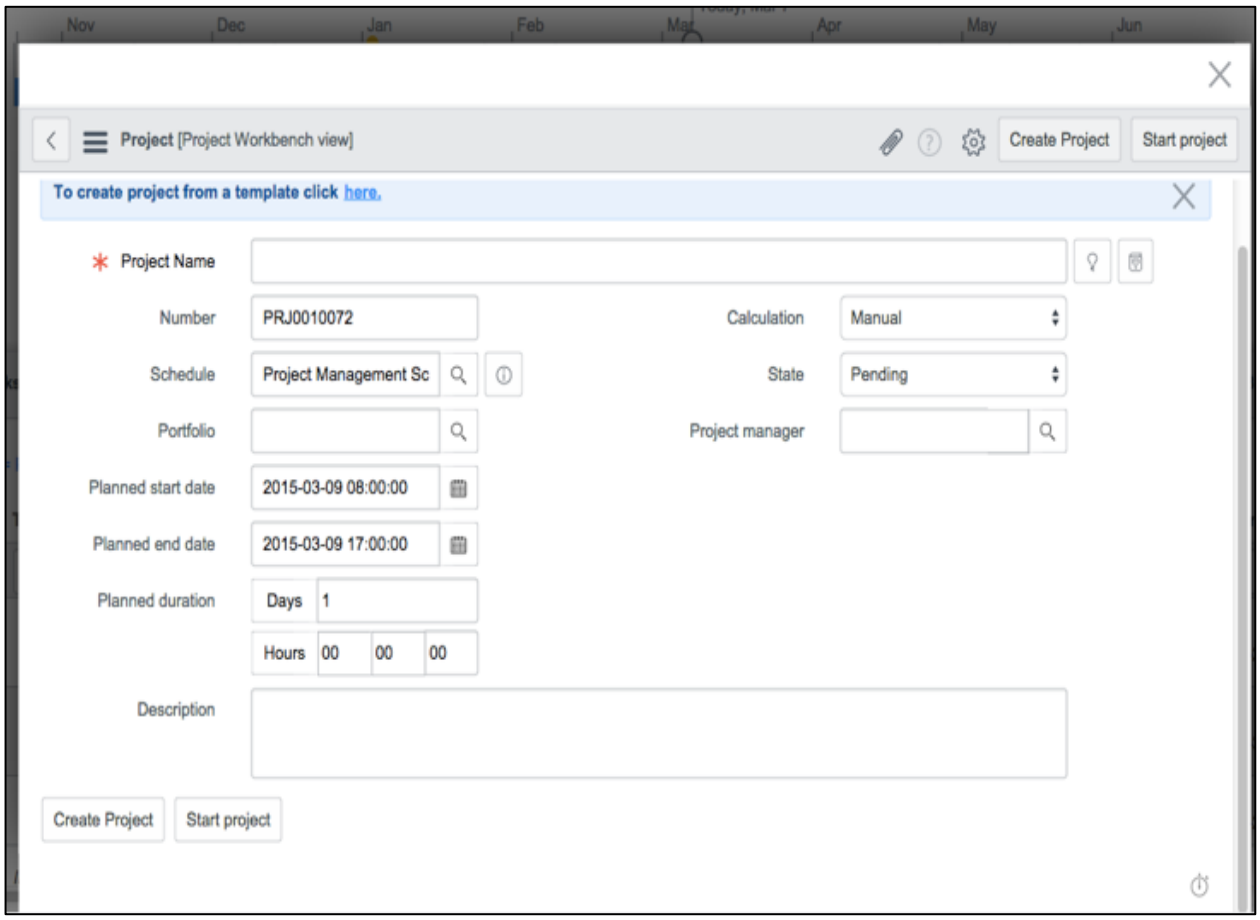

**Note**: Going forward, navigation steps will be abbreviated to "**Application > Menu > Module"**.

**Example**: "Navigate to **Project > Projects > Workbench"**.

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3. Click **New Project**. A new project screen will appear.



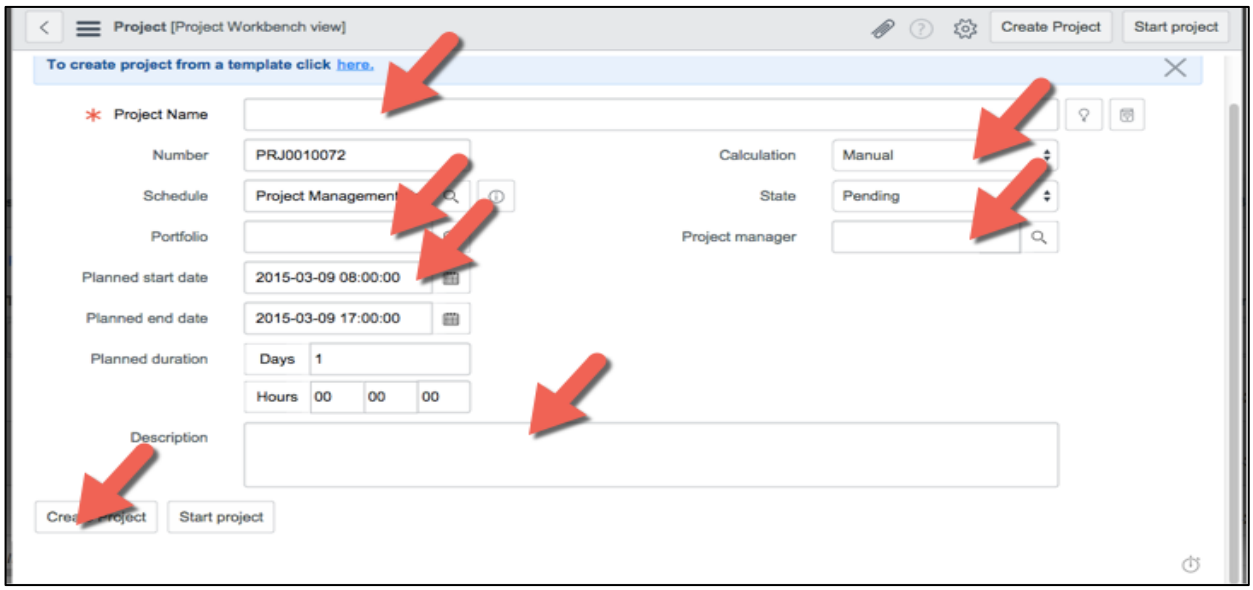




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4. Complete the following fields with data of your choosing, and then click **Create Project**.

   **Tip**: Prefix your Project name with your name. It will be easy to remember.

   Project Name
   Portfolio
   Planned start date
   Calculation: **Manual**
   State: **Pending**
   Project manager
   Description



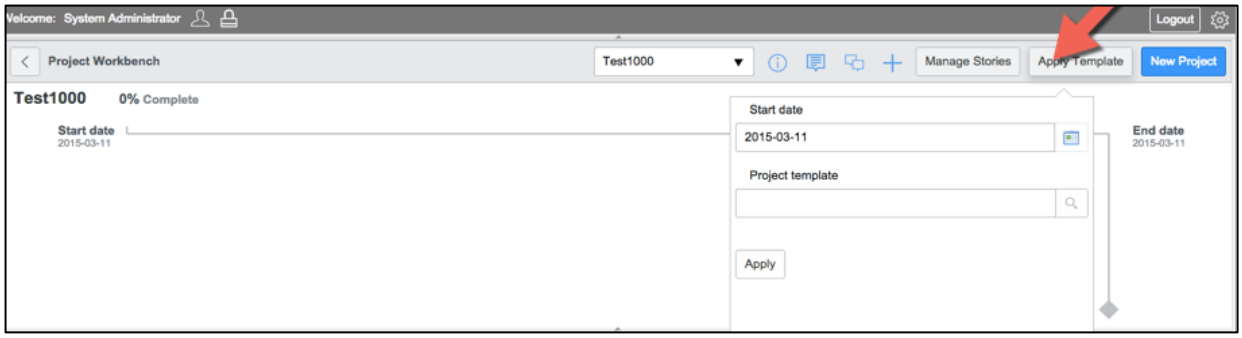

**Note**: Planned End date will be populated from the project schedule.

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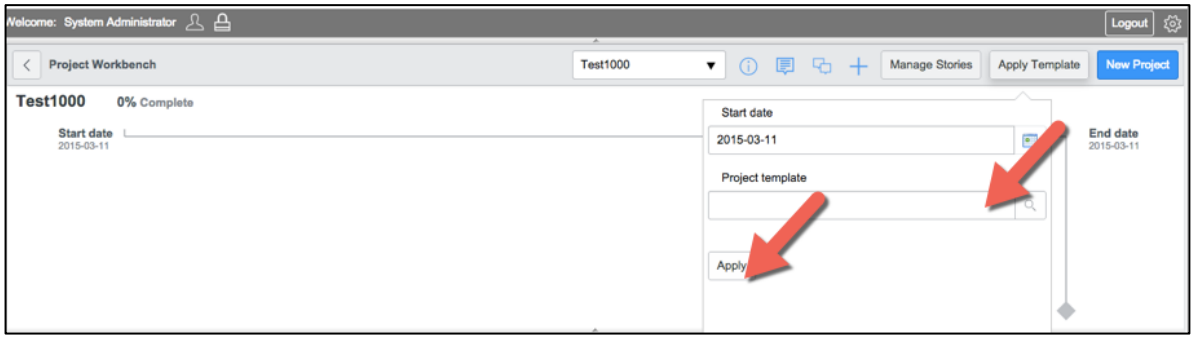
## Lab 2.2 Apply Template

This lab explains how to apply a predefined project Template to the newly created project. This adds Work breakdown structure (also referred as project schedule).

1. Click **Apply Template**.




2. Select a **Project Template**, and then click **Apply**.

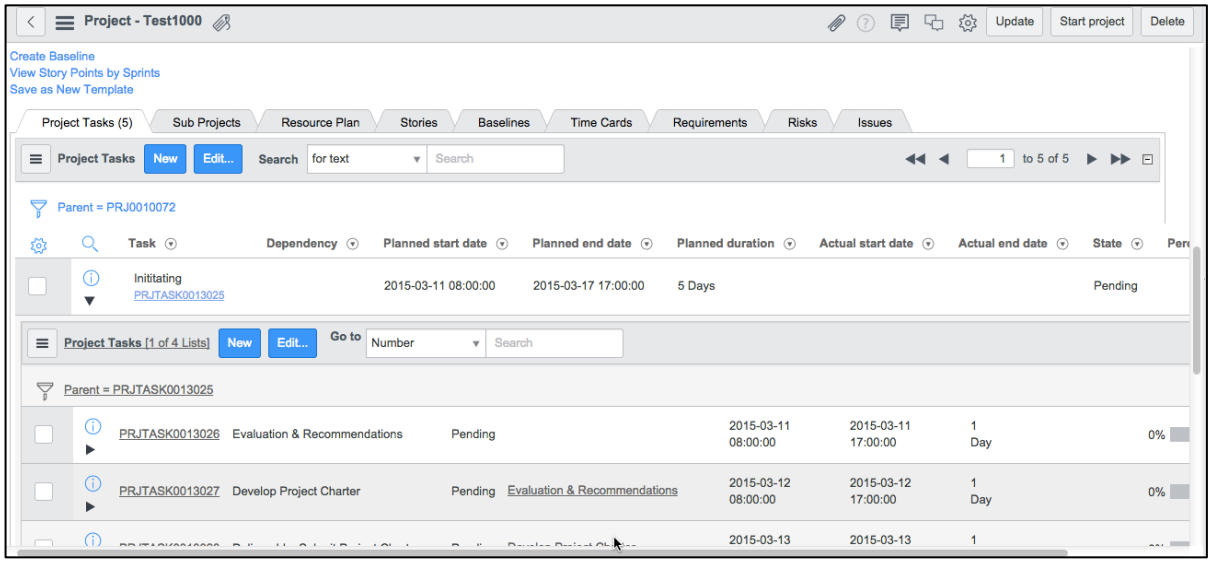



**Note**: You can configure different templates for different types of project.

**Note**: Make sure you set up appropriate templates before applying the template; you can also use a Microsoft project schedule to upload a template schedule.

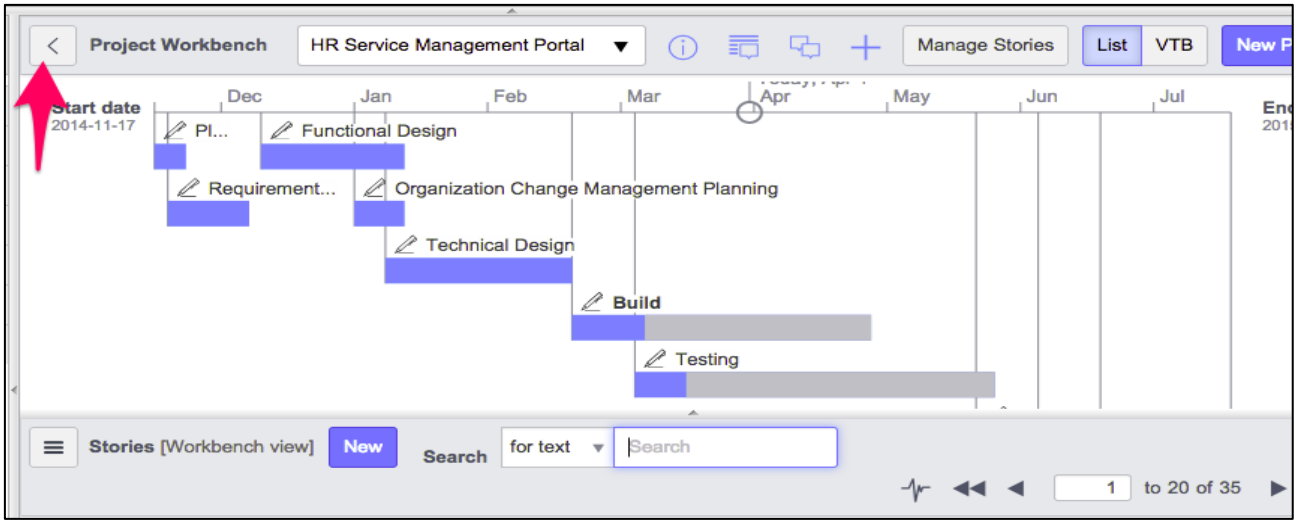
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3. The **Project Tasks** tab is populated with the Tasks from the applied Template.



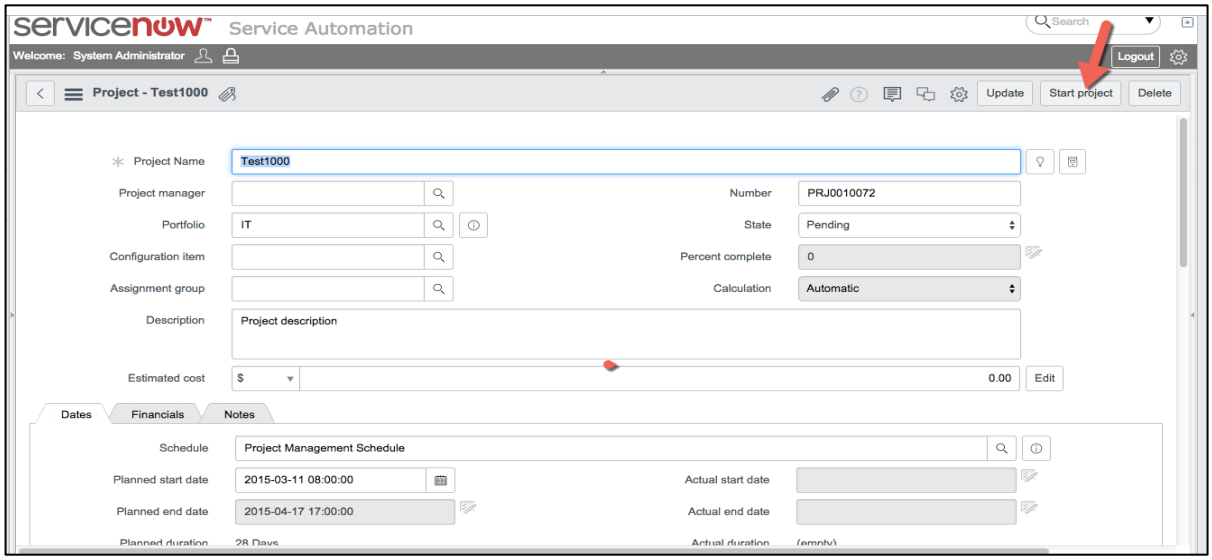

**Note**: Planned End date is populated based on the duration in the Template Project.

4. Select the **back button** to see the project details.




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5. To start the project, click **Start project**.

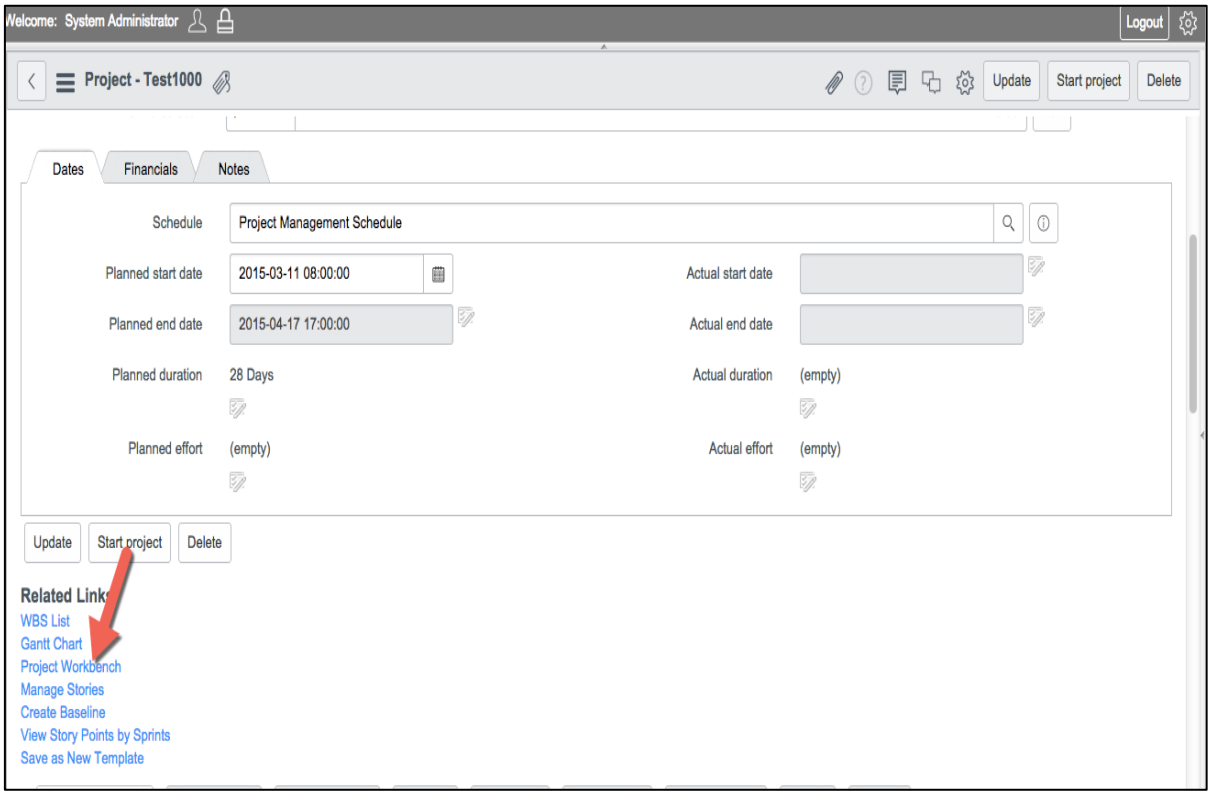



**Note**: Start Project Populates 'Actual Start Date' of the Project. Actual End date will be populated when the last task of the project is 100% Complete.

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## Lab 2.3 Manage Project Schedule in Project Workbench

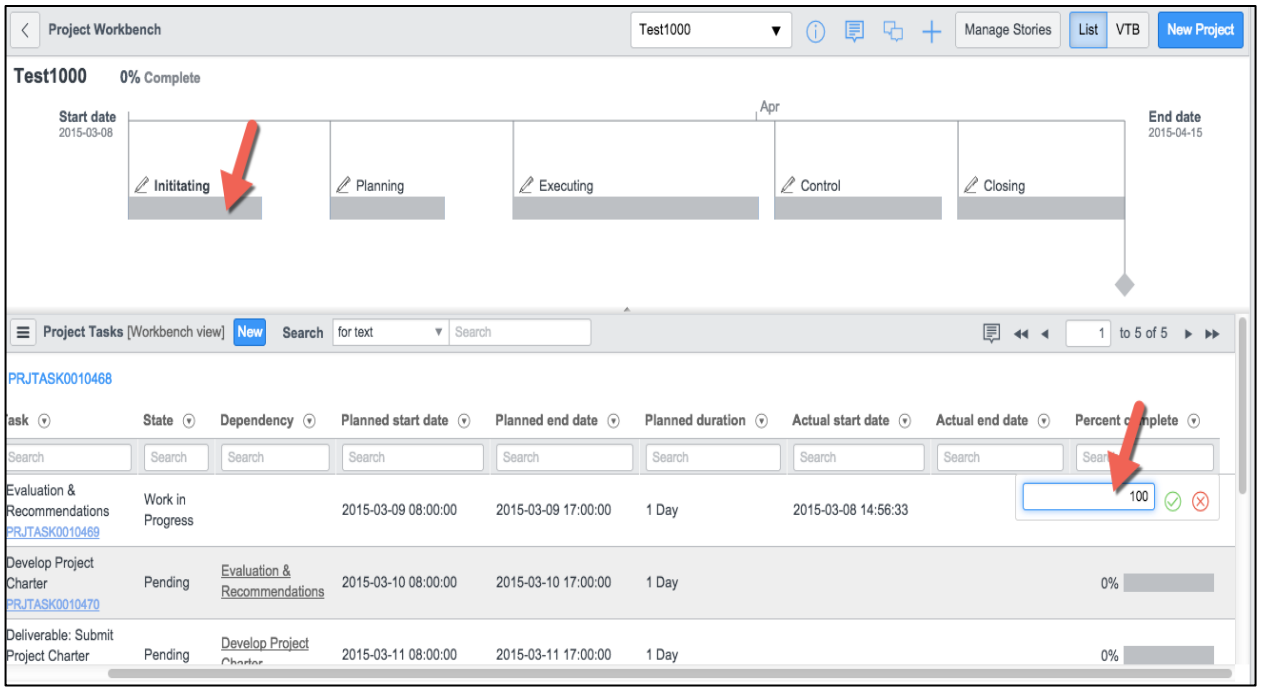
1. Under the **Related Links** in your Project record, click **Project Workbench**.




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2. Project Workbench links to the Workbench area of the Project.

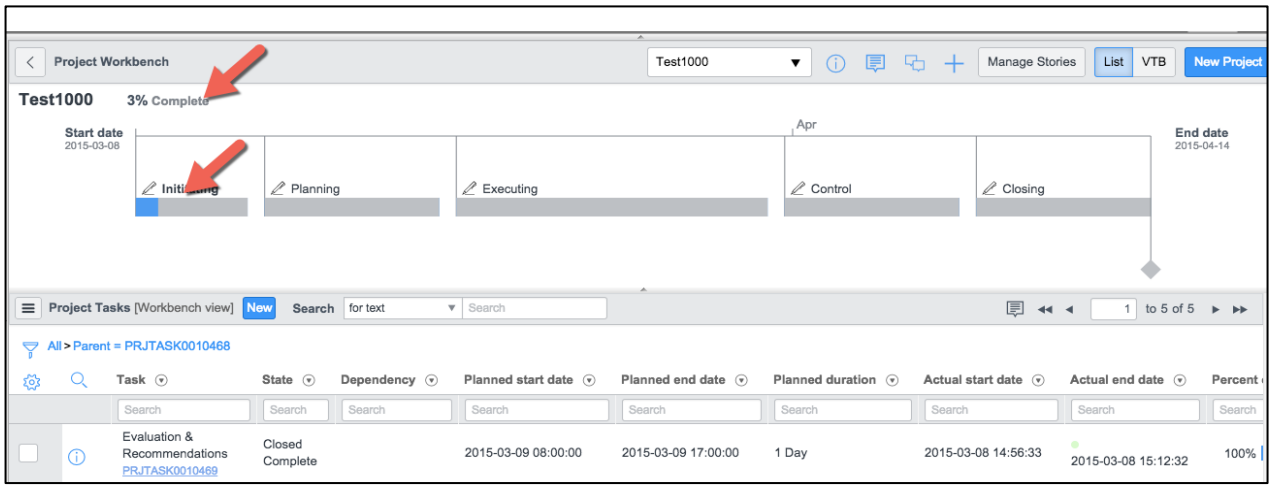
   Click **Initiating** to get the Task list of that Phase below.
   Edit **Percent Complete** of the first Task to **100%**.



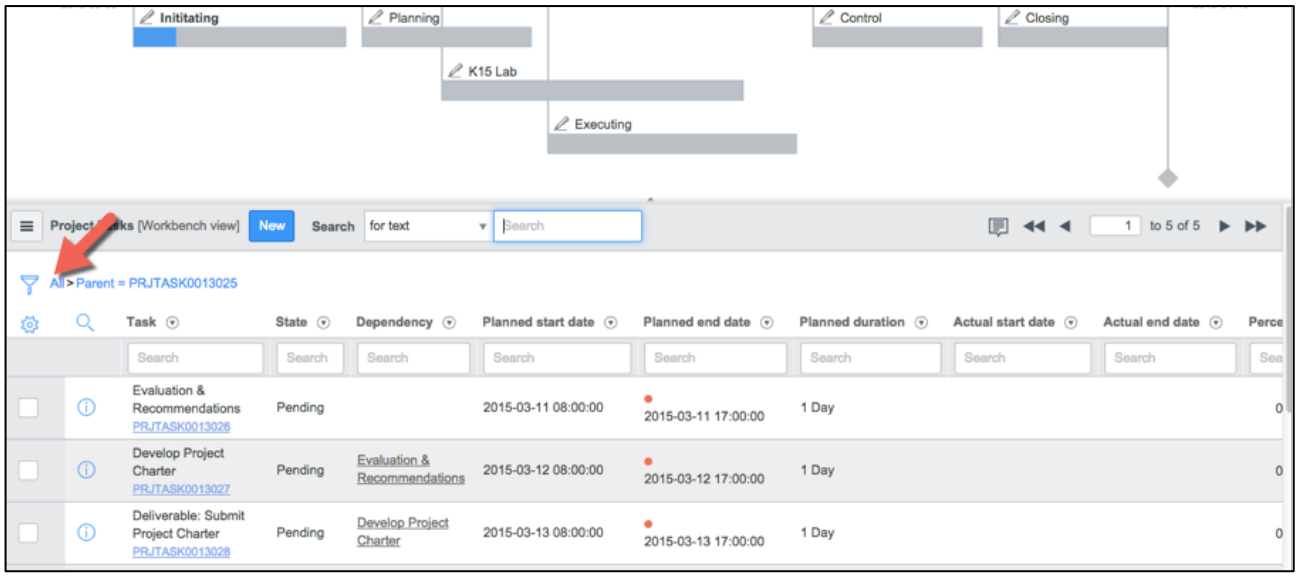

**Note**: From Workbench View you can modify Tasks, Planned Start Dates, Planned End Dates, % complete, and Add New Tasks.

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3. Editing the Task percent complete updates **Project complete percentage** and **Phase Complete percentage**.

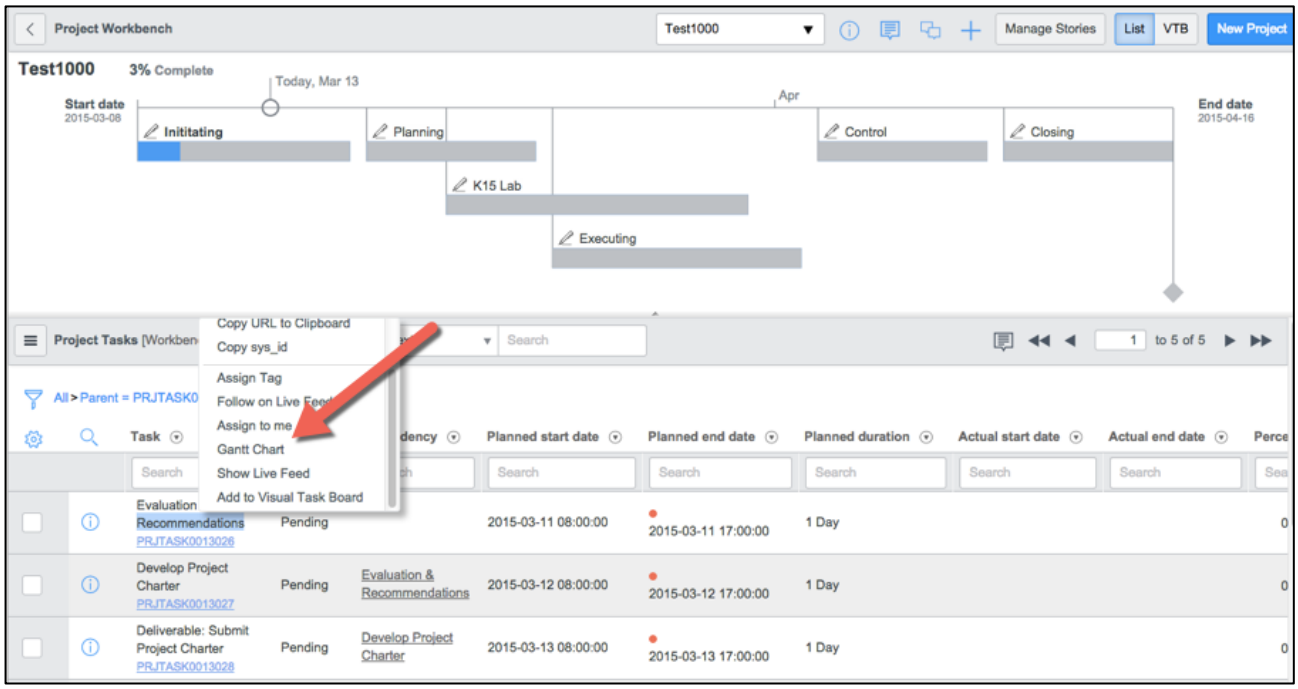



4. You can get list of all Project Tasks, not just that particular Phase, by using the filter in the list view and clicking **All**. This allows you to edit any task of that project.

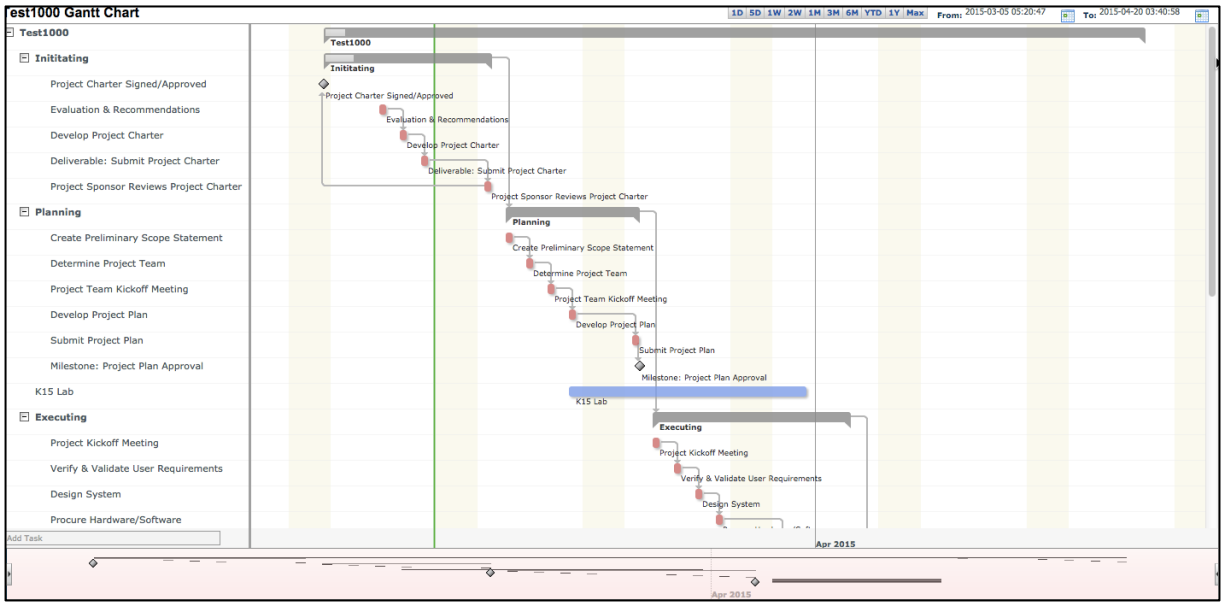



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5. You can also get traditional **Gantt** view from Workbench list. Choose a task in the list view, right-click on the **Task** and choose **Gantt Chart**. You may have to scroll to find the menu item.

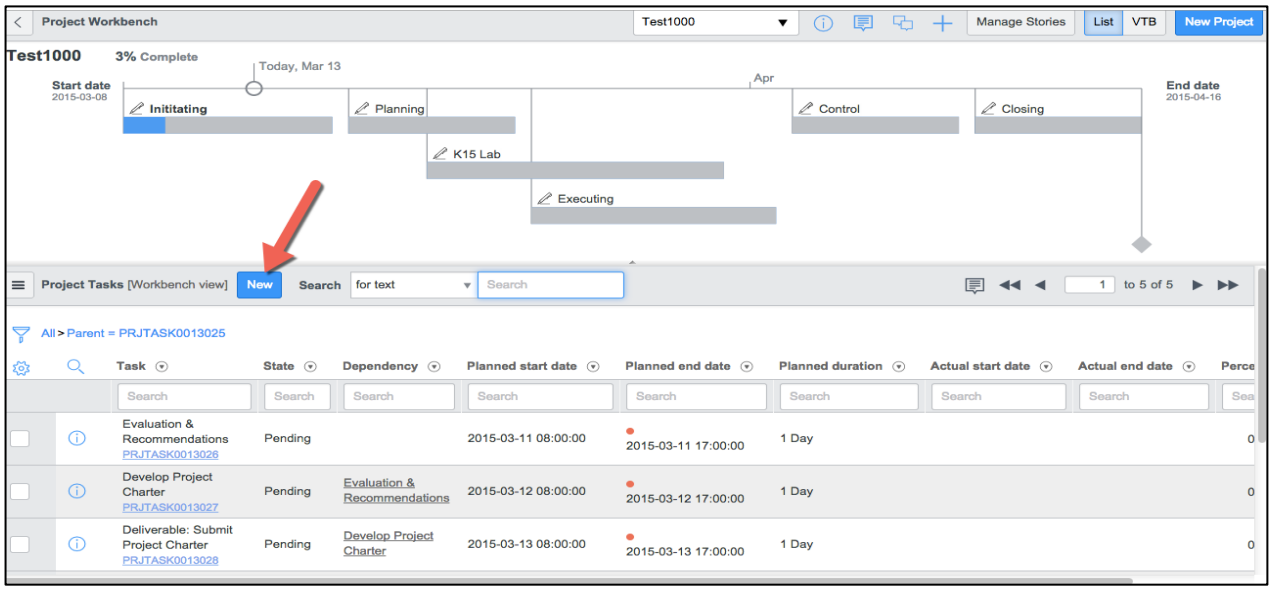



A **Gantt Chart** opens in another window.

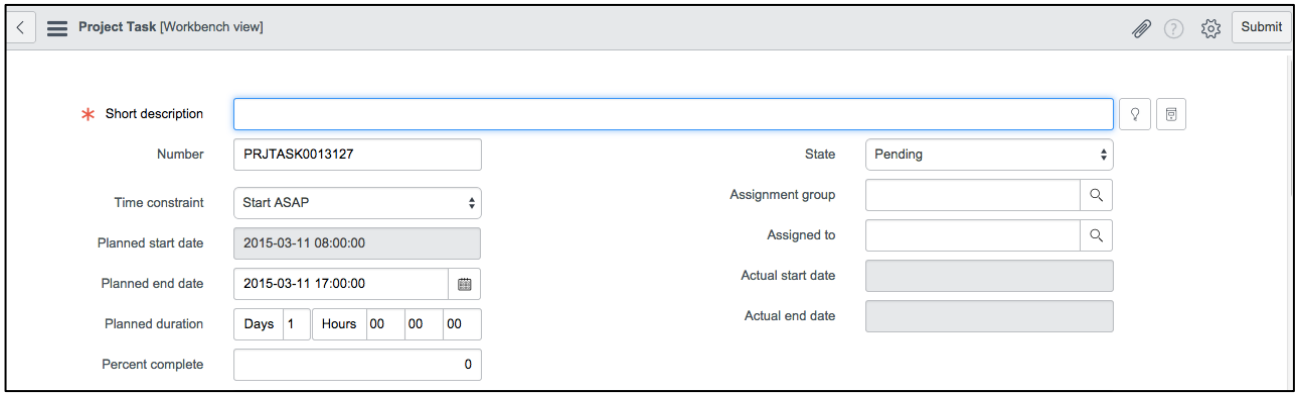



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6. You can also add additional Tasks from **Workbench** View. From the Project Tasks list, click **New** to create additional tasks.

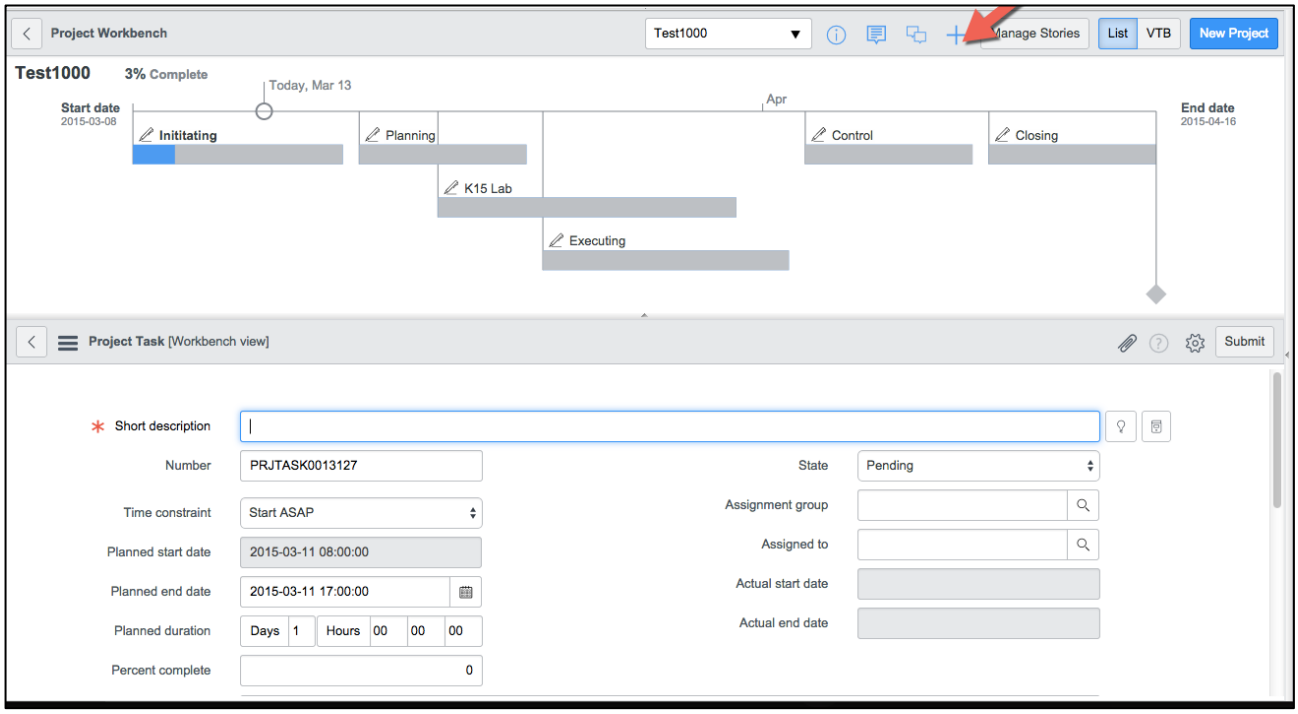



7. Fill in the **Task** details. This updates to the schedule in **Workbench** view and **Gantt Chart** view.



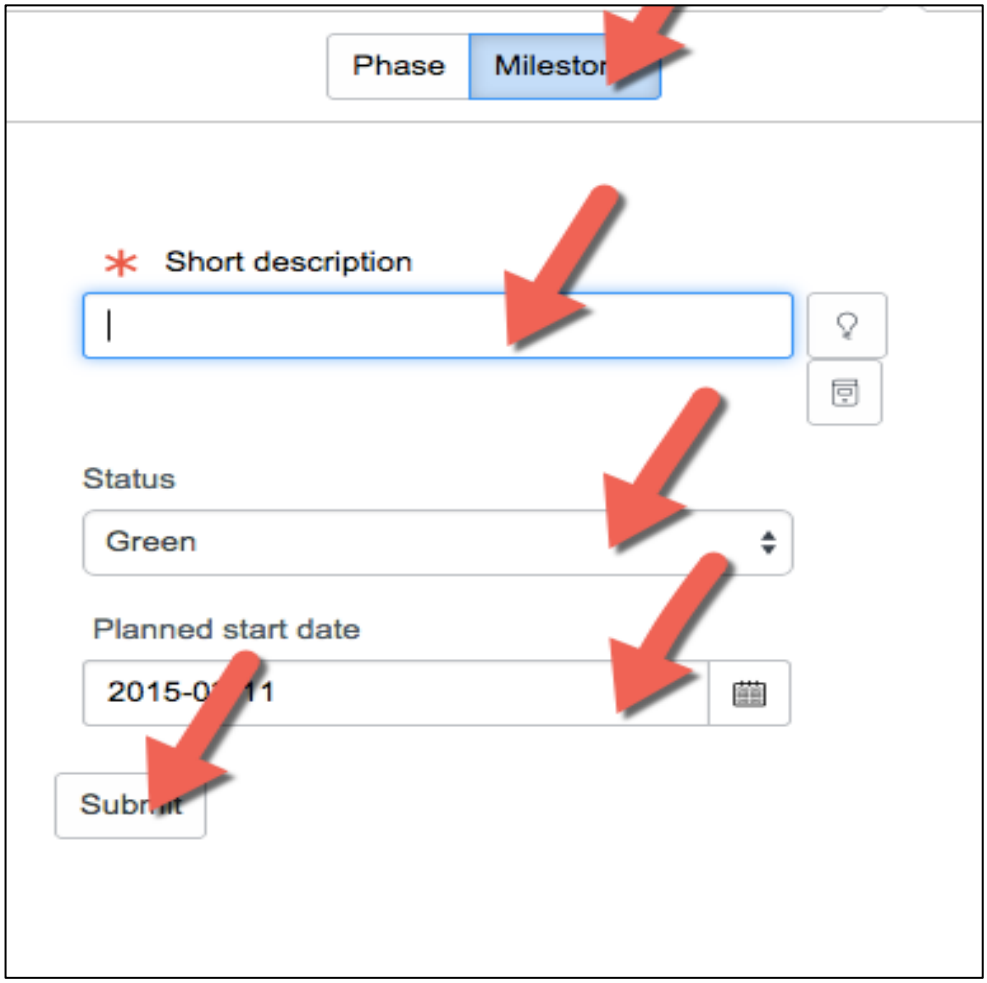

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8. Milestones in Project Workbench and Gantt are different. Milestones in **Workbench** view are for Status tracking only. Milestones in **Project** plan or **Gantt** view require approval. To create a Milestone in Project Workbench, click the **+** (Add Phase) icon.



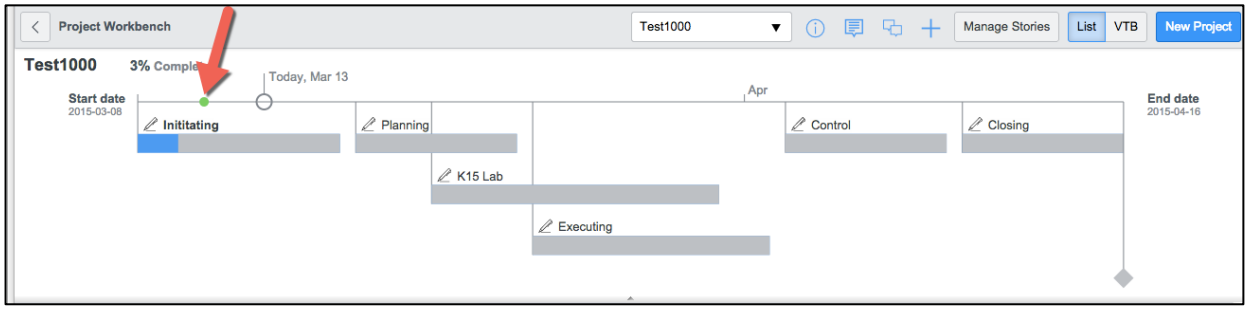

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9. Click **Milestone.** Provide a **Short description**, **Status**, and **Planned start date.** Click **Submit**.




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10. Workbench is updated with the newly created '**Milestone'** in the previous exercise.




**Note**: The Milestone color is based on the Milestone status.

## Congratulations!

You have completed the creation of a Project from Workbench. You have learned how to:

- Create a Project
- Apply a Template
- Manage Project Schedule in Project Workbench

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# Lab Goal

This lab explains how to create and manage Agile Phases in Project workbench space.

**Lab 3.0 Create and Manage Agile activities**

## Lab 3.1 Understand and Create an Agile Phase

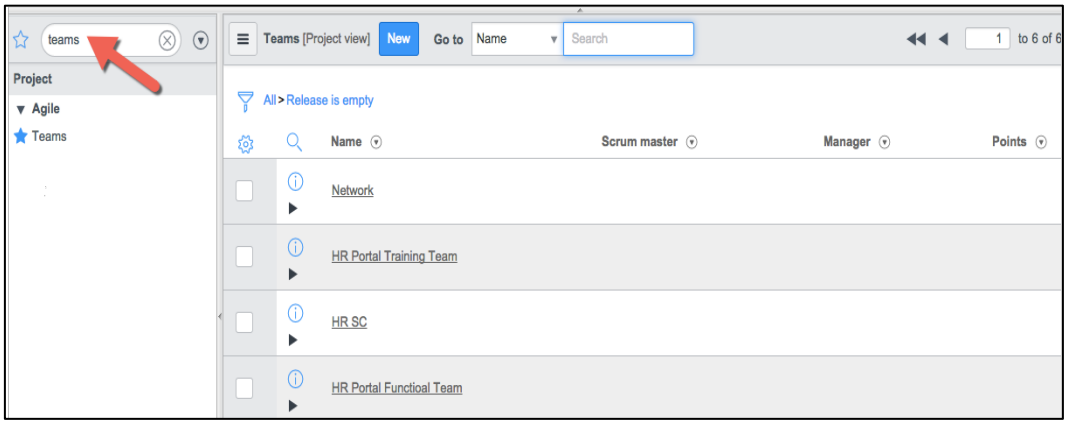
- Agile methodology would approach a project as a series of very small projects called sprints.
- Working software is released periodically in an iterative manner until the entire software product is complete.
- Requirements are formulated into Stories. Stories are completed over a fixed period of time called Sprint.
- A product owner and a scrum master engage in Sprint Planning where stories are prioritized and it is decided which story will be worked in which Sprint.
- The water-scrum-fall methodology allows for Sprints to be assigned Stories belonging to different Projects so that an Agile team can work on multiple projects in the same Sprint.

When planning Agile and Non-agile tasks, you need to follow below steps:

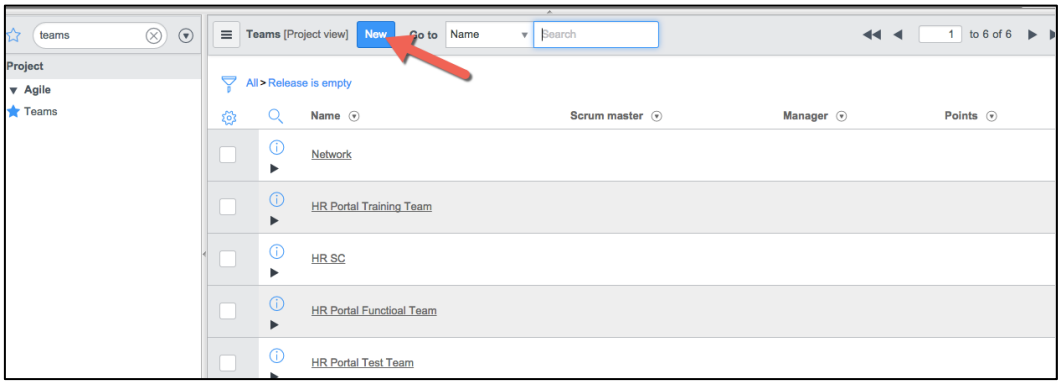
- Create Scrum teams – Assign Manager, Scrum Master and Team with roles
- Add an Agile Phase (One Agile Phase per project)
- Assign Project's Agile Phase to a Team
- Begin Populating Stories and Create Project Backlog
- Report and Track story progress up to the project

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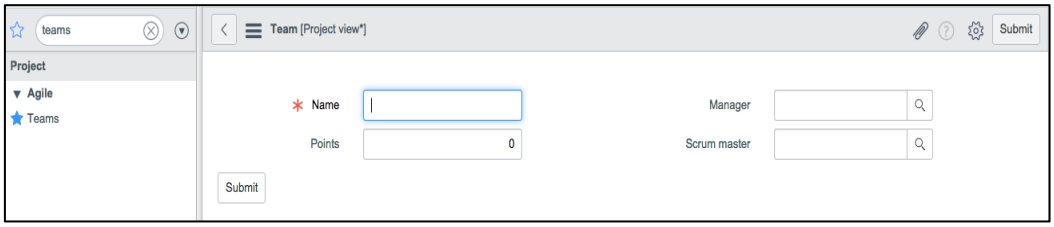
1. Navigate to **Project > Agile > Teams**.




2. Click **New** to create a New Agile Team.



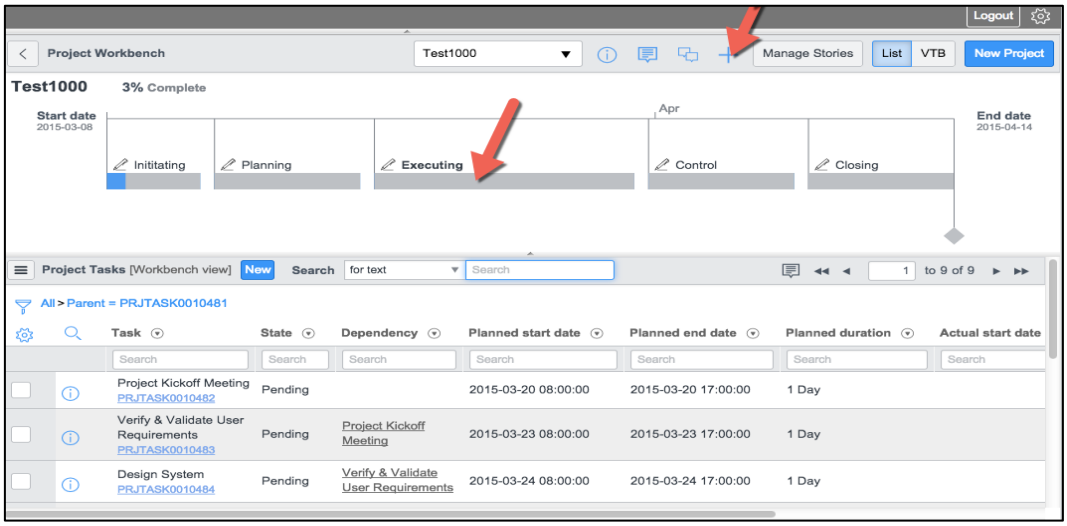

3. Fill in the **Name**, **Manager**, **Scrum Master** and **Team points**. Click **Submit**.




**Note**: Points are the estimated effort of the team.

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4. Go back to the project you created in Lab 2. Click the **Executing** phase and click the **+** (Add Phase) on the top bar of the Workbench.




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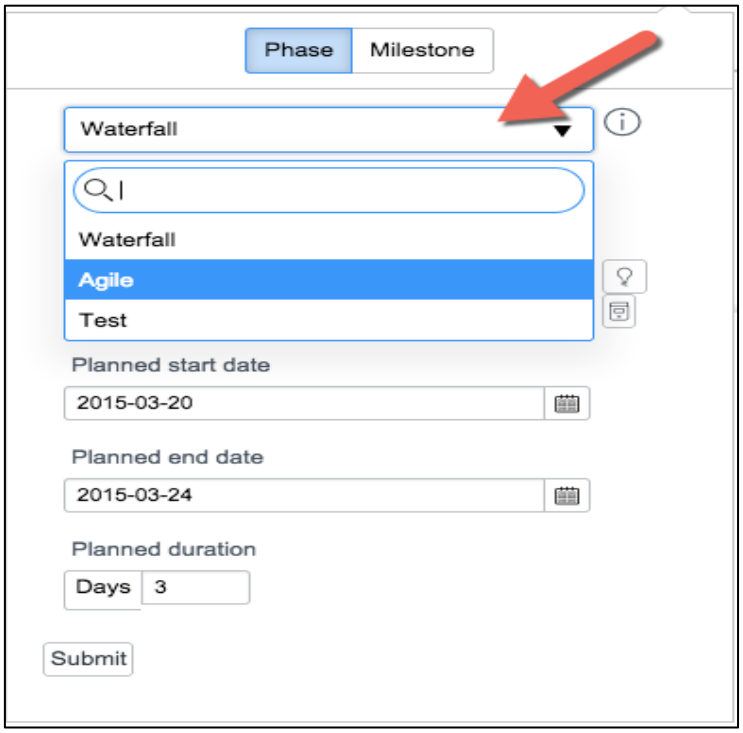
5. Choose **Agile** from the drop down menu and complete the following fields:

   **Short Description**
   **Planned start date**
   **Planned end date**
   **Team**
   **Start Sprint**
   **End Sprint**

   **Note**:

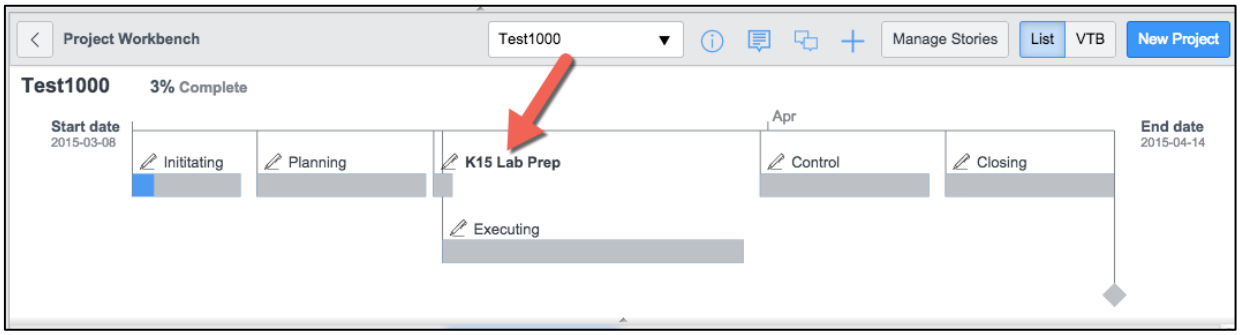
   - Planned Start and Finish dates should fall between the 'Executing' phase start and End Dates. End date can be derived from "Planned Duration' or Vice Versa
   - A Team can be assigned to project as early as addition of the Agile phase
   - There can be only one team and one agile phase per project
   - Optionally assign start and end dates at the time you define the phase
   - Only the Sprints Assigned to the Team that fall between the timeline of the Project/Phase show in the Drop down list of Start and End Sprints

   Click **Submit**.

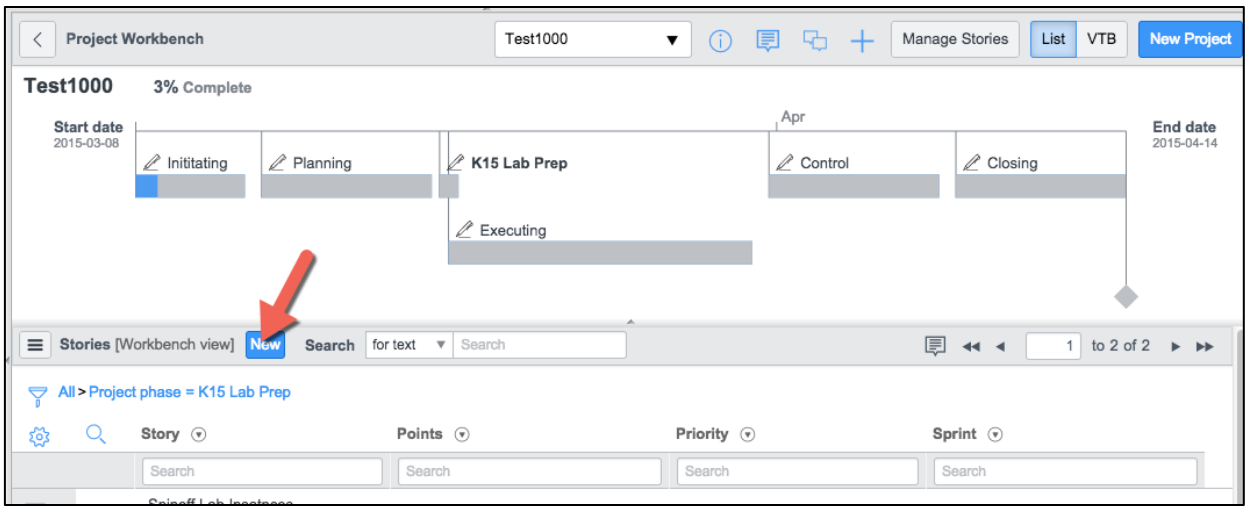



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6. The new Agile Phase now appears in the Workbench. From here you can create and Manage Stories for these Sprints.

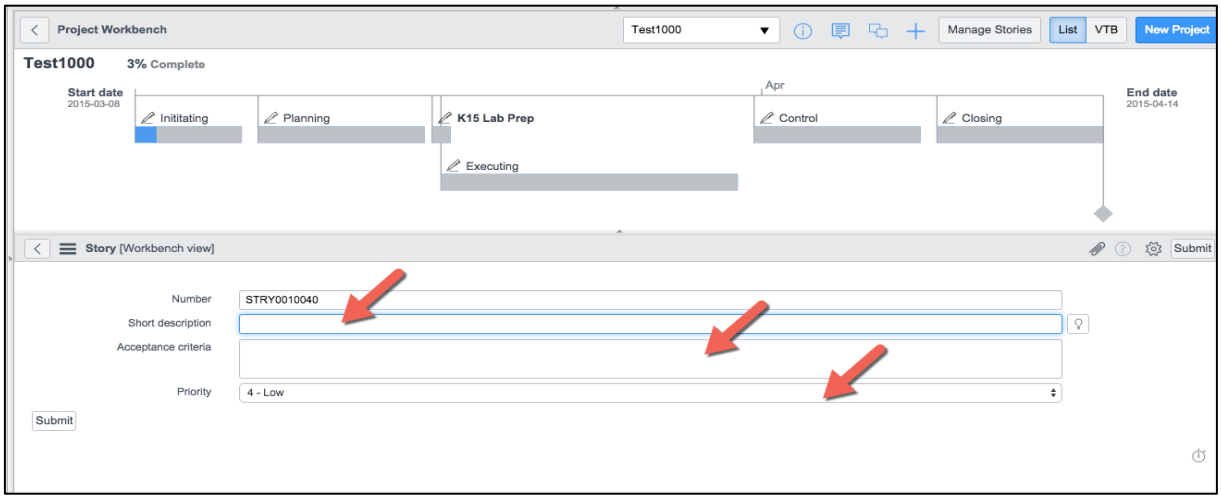



7. To create Stories in the Sprints in this Agile Phase. Click **New**.

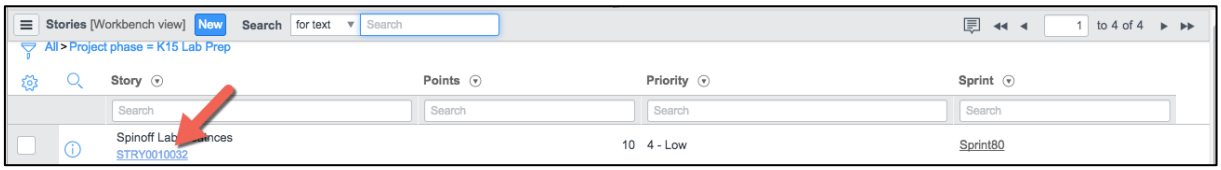



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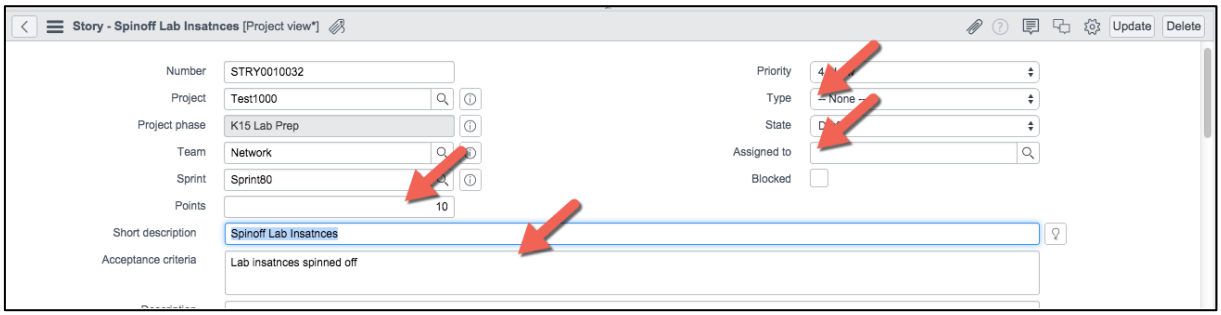
8. Fill in the **Short Description**, **Acceptance Criteria**, and **Priority**. Click **Submit**.




9. To plan that story in detail, access it from workbench. Click the **Story** link.

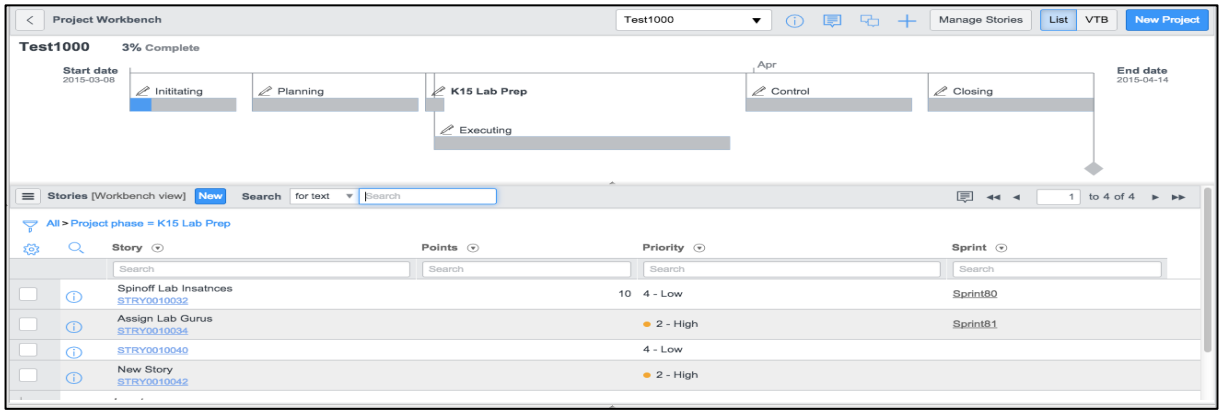



10. Input details of the **Story**.




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11. Within a single Pane you can create and manage **Waterfall** and **Agile** phases.




## Congratulations!

You have completed creation and management of an Agile Phase in Workbench.

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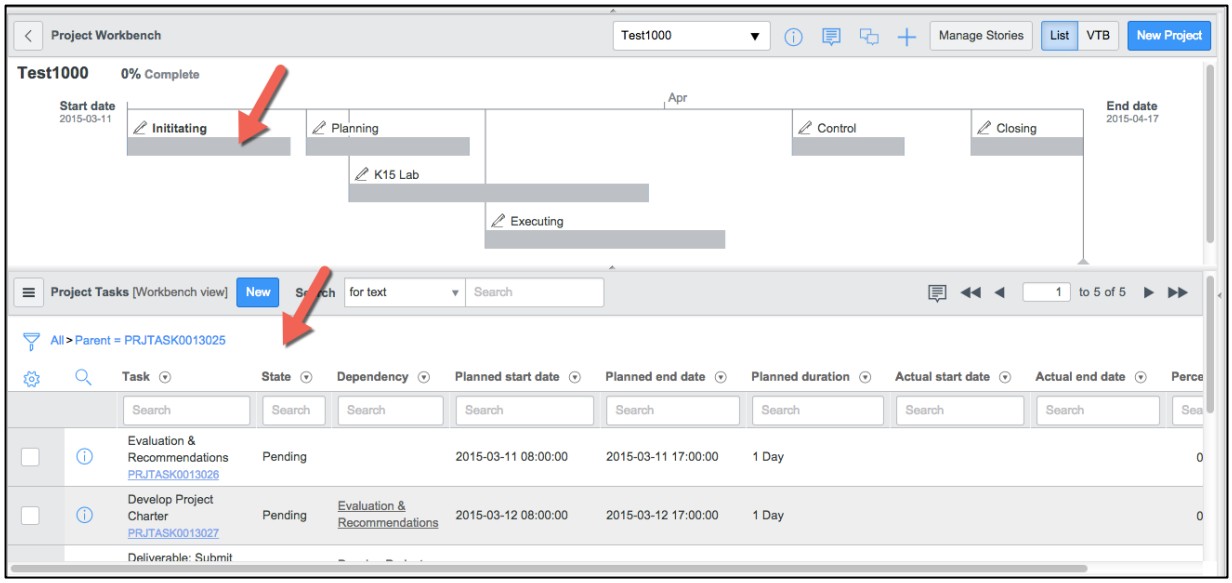
# Lab Goal

Managing work with Visual Task Boards, Lists and Planning Boards. Visual task boards transform the navigation of lists and forms into an interactive graphical experience. Planning boards provide a workbench view of stories for teams and sprints.

**Lab 4.0 Managing work**

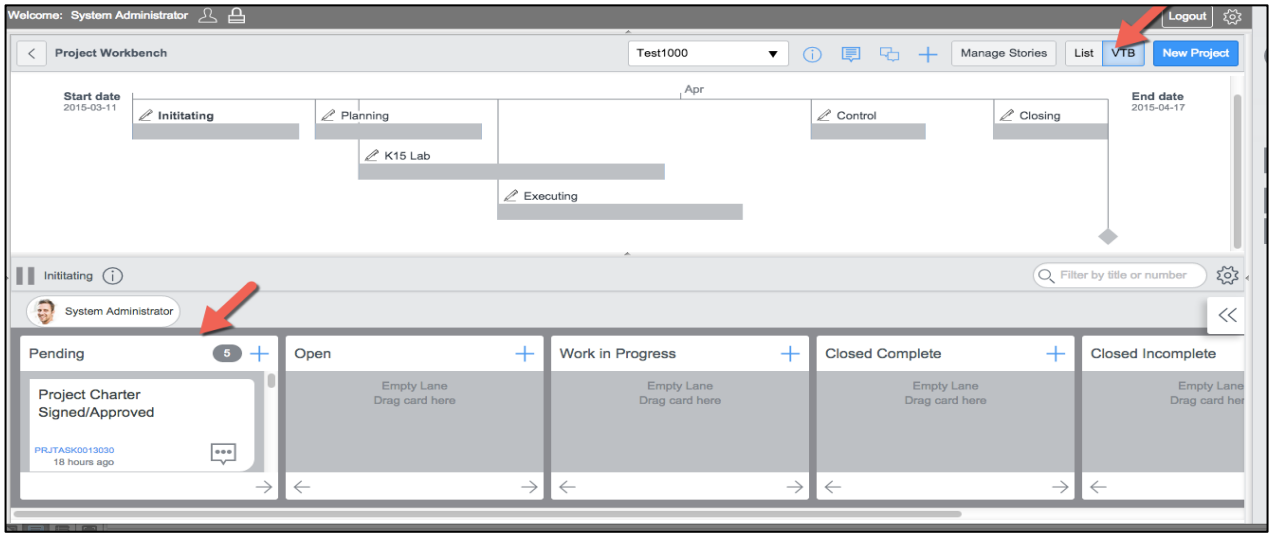
## Lab 4.1 Managing tasks with Visual Task Boards

1. Click on any of the phases in the Workbench to see a list of the Tasks for that phase.

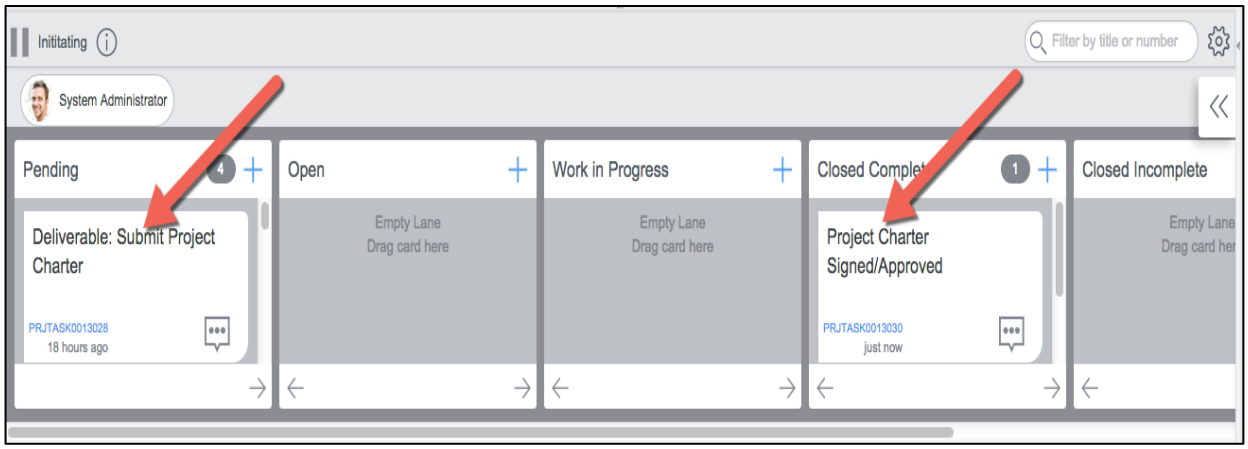



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2. Click on VTB icon on the **Workbench Bar** to see the Visual Task Board view.

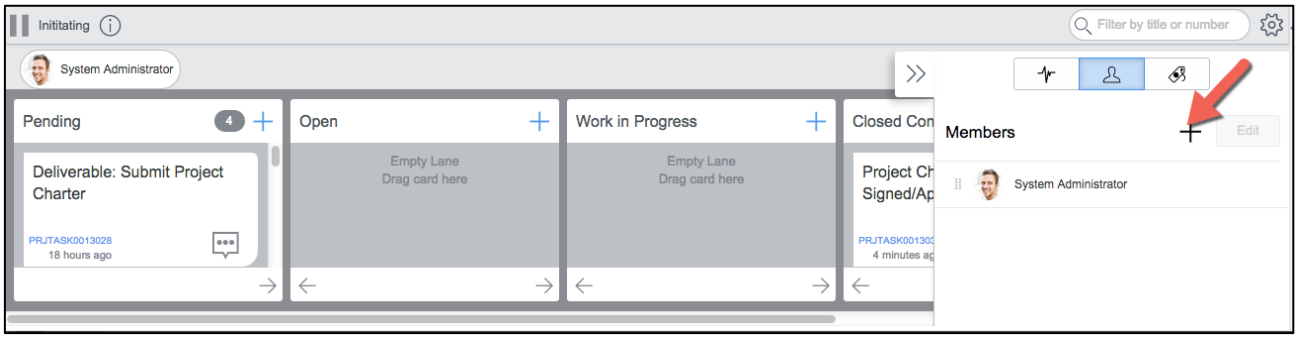



3. The status of the tasks displays. Update the Status of the Tasks by moving the Tasks from one lane to another.

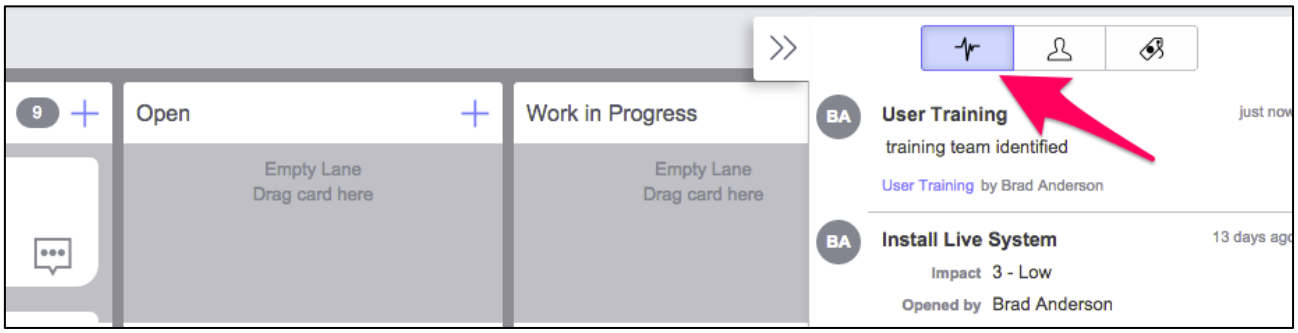



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4. Add members to the tasks by clicking on **+** and selecting a member/user from the drop-down and add **Live Feed** activity.



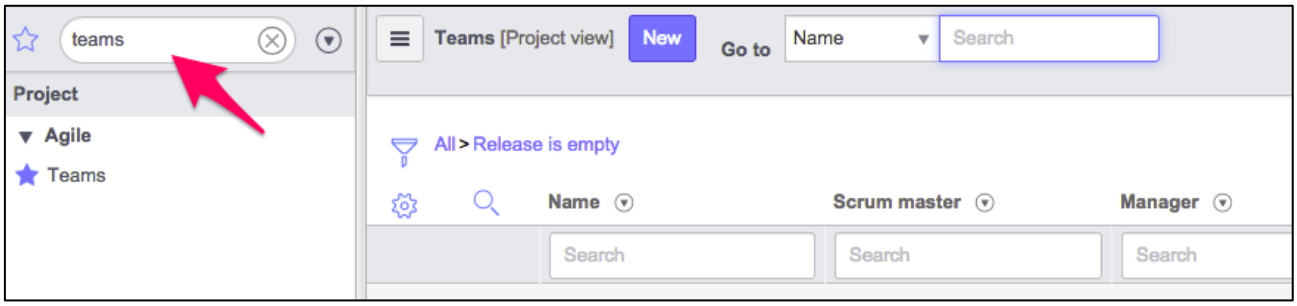

5. See real time updates of the tasks using the **Activity Stream**.




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## Lab 4.2 Managing Stories with Planning Boards

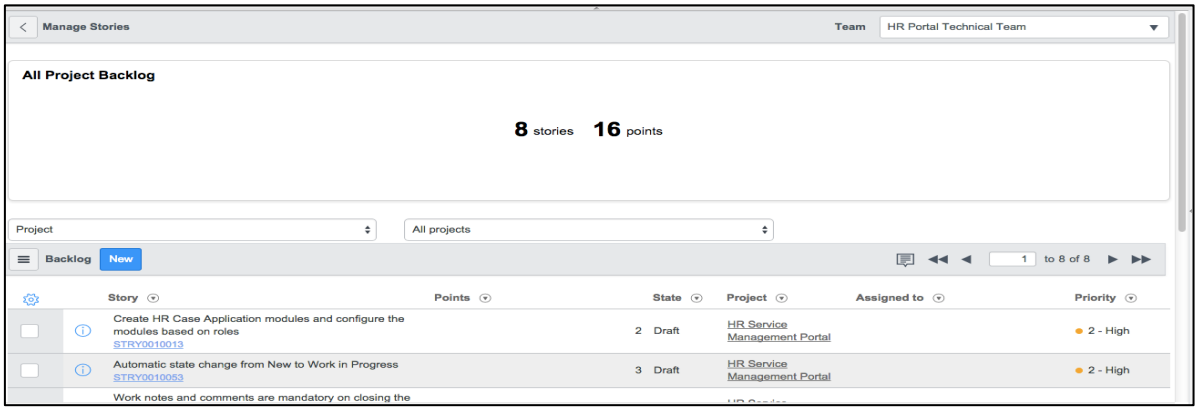
1. Navigate to **Project > Agile > Teams**.




2. Select a team and click **Manage Stories** from the Related Links list.



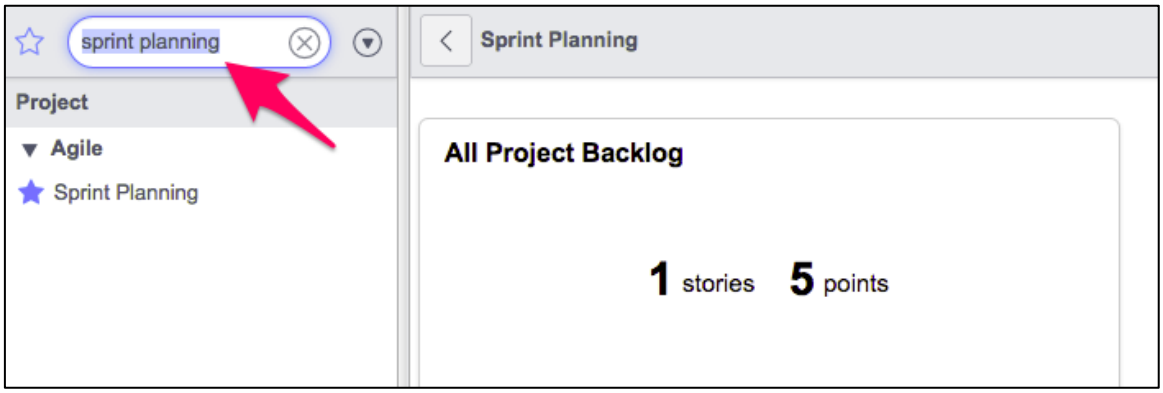

3. From the **Team Backlog**, stories can be managed for either an individual or all projects assigned to the team.



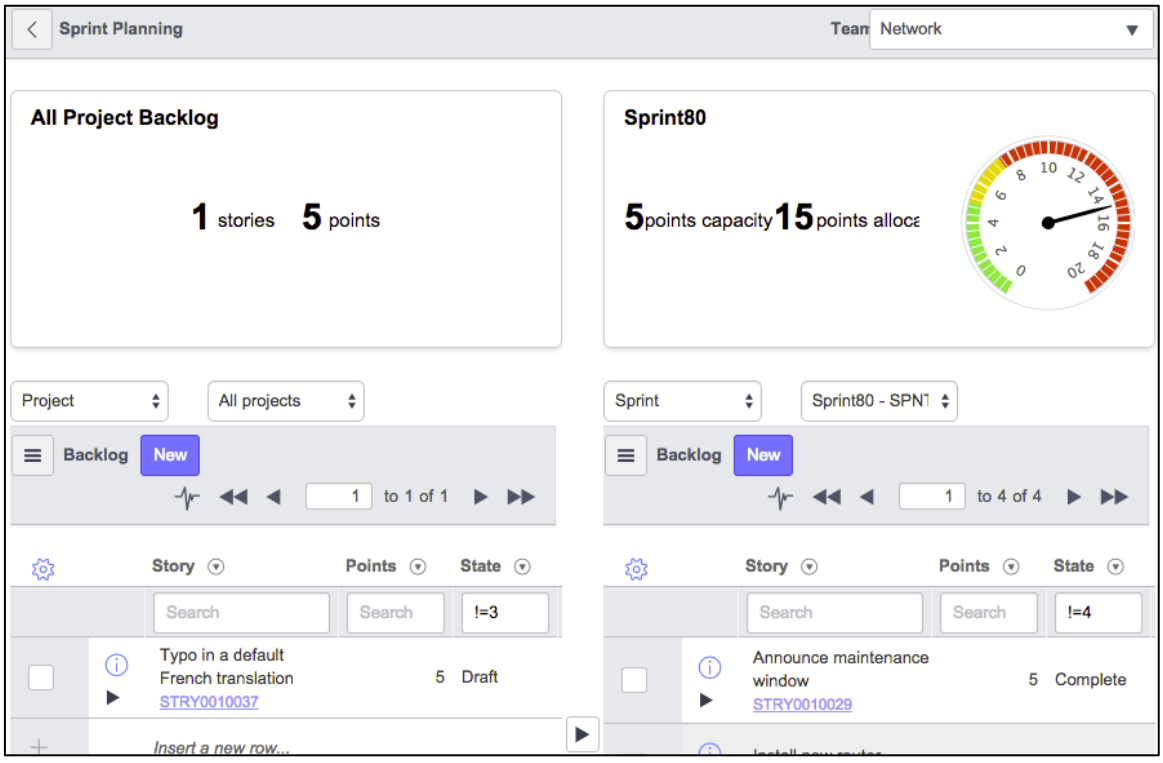

**Note**: Team Backlog gives a single view of all stories assigned to the Team.

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4. Use the **Sprint Planning** board to manage stories and assign them to sprints. Navigate to **Project > Agile > Sprint Planning**.




5. From the **Sprint Planning** board teams can see and manage the stories in the project backlog and what has already been assigned to a sprint.




## Congratulations!

You have completed Managing work with Visual Task Boards and Lists and Planning boards.

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