knowledge15

April 19–24, 2015 • Mandalay Bay • Las Vegas, NV

Lab Guide

PPM 102:

Project and Portfolio Management

The Future, Now

J. Scott Hadaway & Laura Pekela

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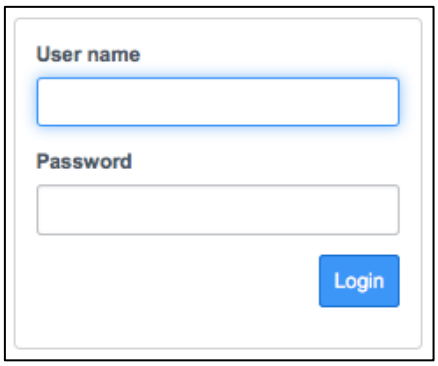
Lab Goal

Perform Pre-Lab Setup and confirm proper configuration and required data for the completion of the labs.

Pre-Lab Configuration

Log on to Your Lab Instance

1. Your instance URL is on the cover page.
2. Log in using the admin credentials provided on the cover.



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Plugin Confirmation

1. Navigate to **System Definition > Plugins**.



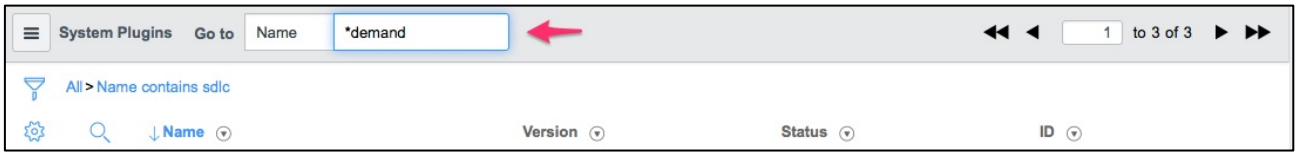
2. Filter the list by ***Project.**



3. Find **Project Management** and **Project Portfolio Suite** and confirm they are both enabled. If either is not **Active**, please raise your hand.



4. Filter the list by ***Demand**.



5. Find **Demand Management** and confirm that it is **Active**.

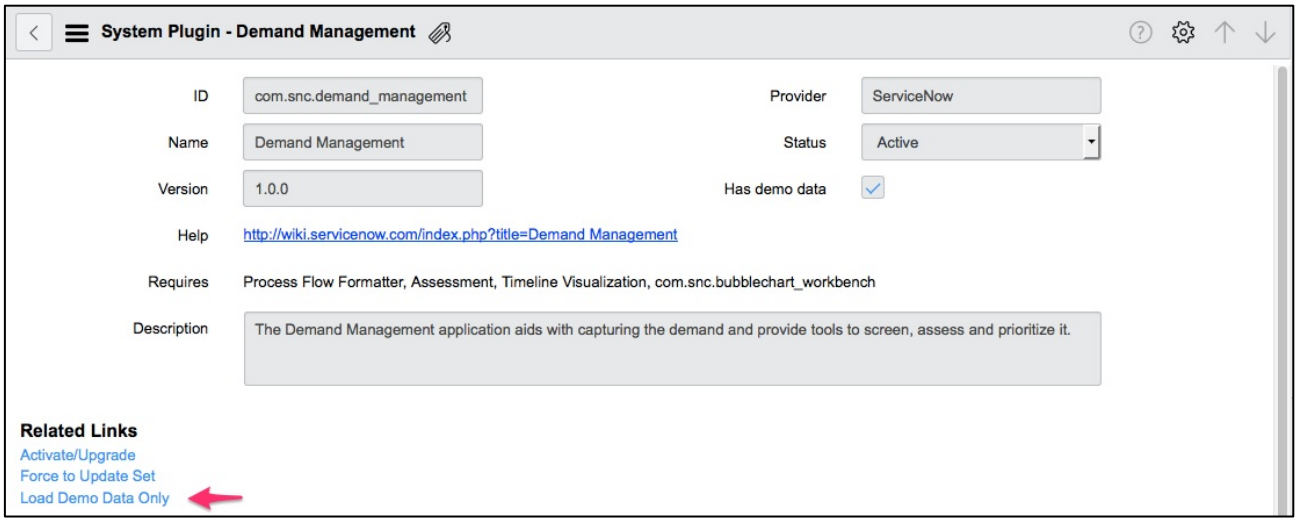


6. Click **Demand Management** to open the plugin.

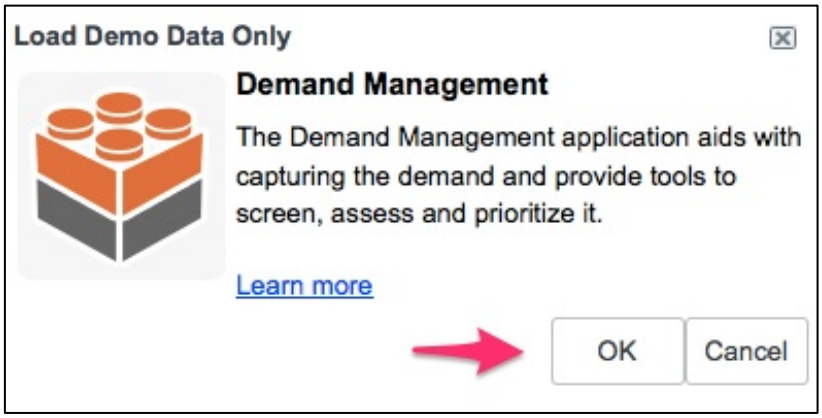


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7. Click **Load Demo Data Only**.



8. Click **OK**.



9. Click **View Plugin List** to Close Window once the data load has completed.



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10. Filter the list by ***Resource**.



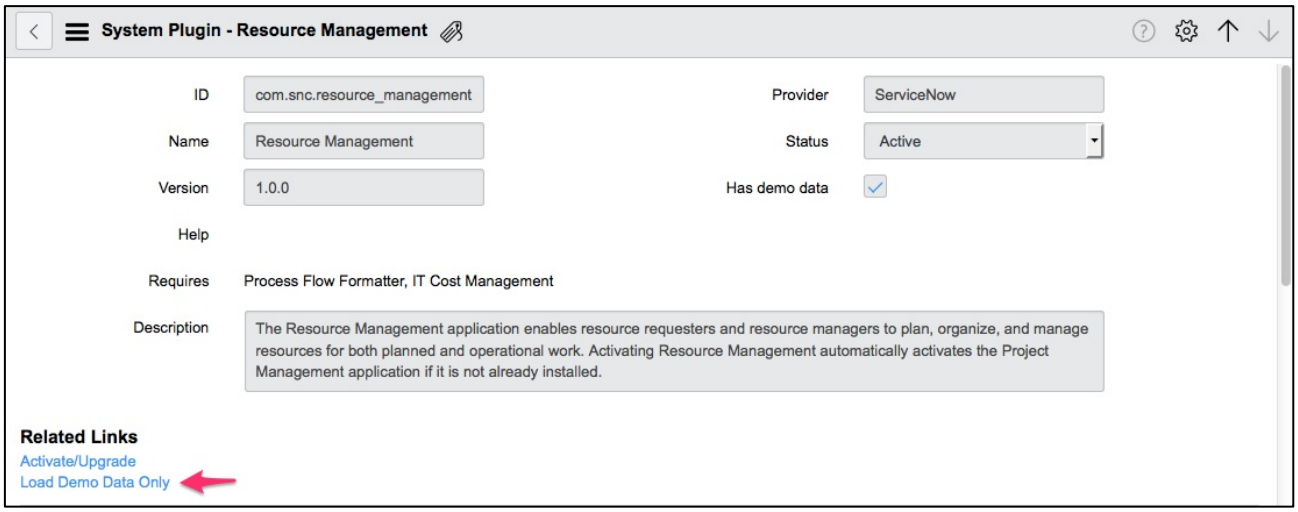
11. Find **Resource Management** and confirm that it is **Active**.



12. Click **Resource Management** to open the plugin.

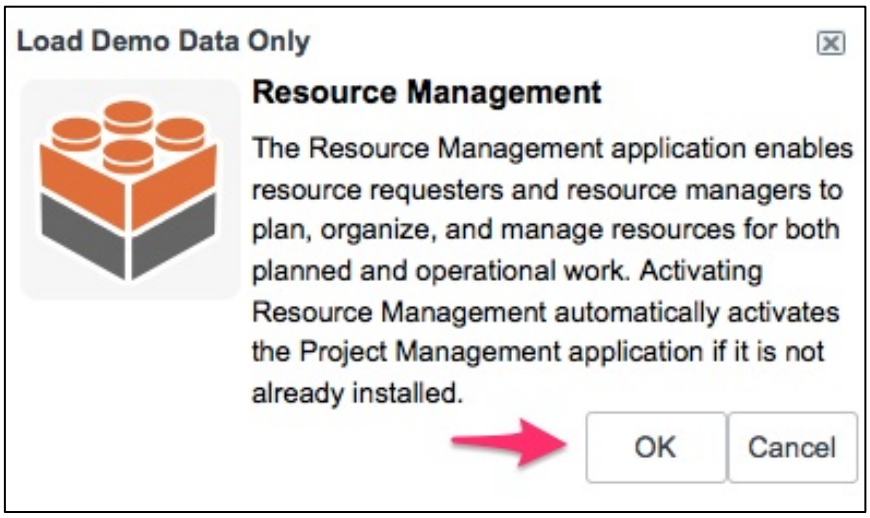


13. Click **Load Demo Data Only**.



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14. Click **OK**.



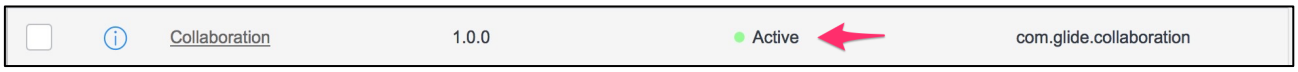
15. Click **View Plugin List** to Close Window once the data load has completed.



16. Filter the list by ***Collaboration**.

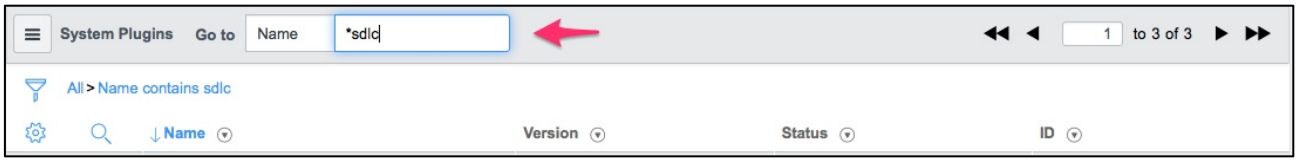


17. Find **Collaboration** and confirm that it is **Active**.

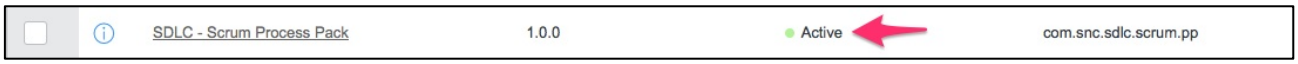


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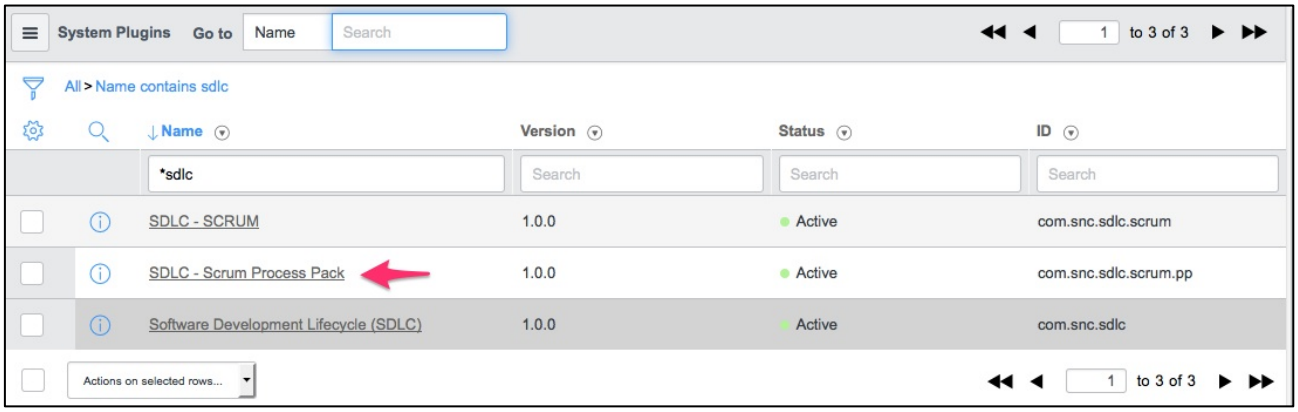
18. Filter the list by ***SDLC**.



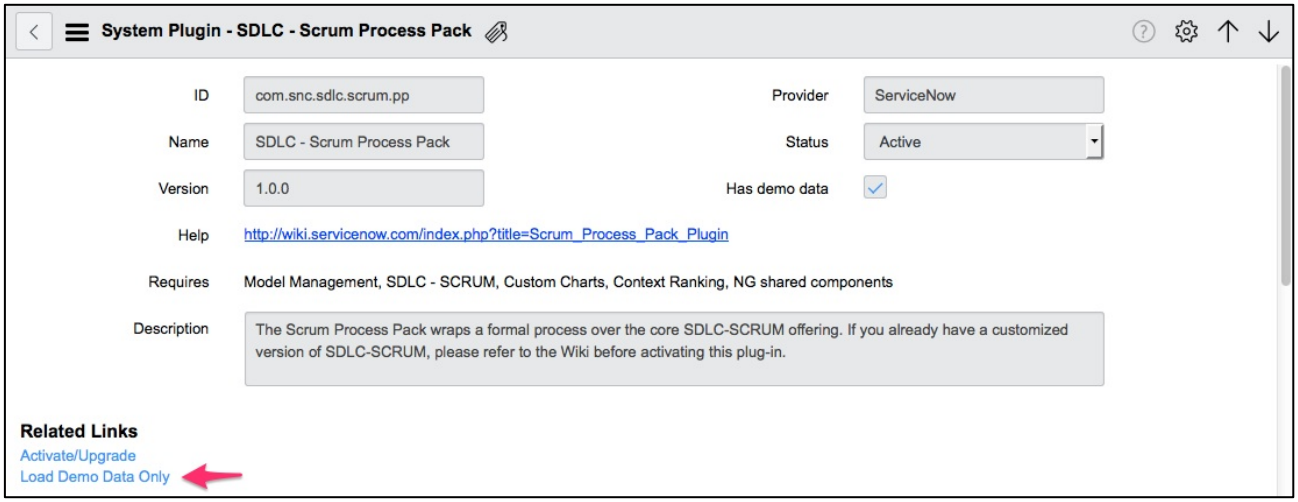
19. Find **SDLC - Scrum Process Pack** and confirm that it is **Active**.



20. Click **SDLC - Scrum Process Pack** to open the plugin.



21. Click on **Load Demo Data Only**.



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22. Click **OK**.



23. Click **View Plugin List** to Close Window once the data load has completed.



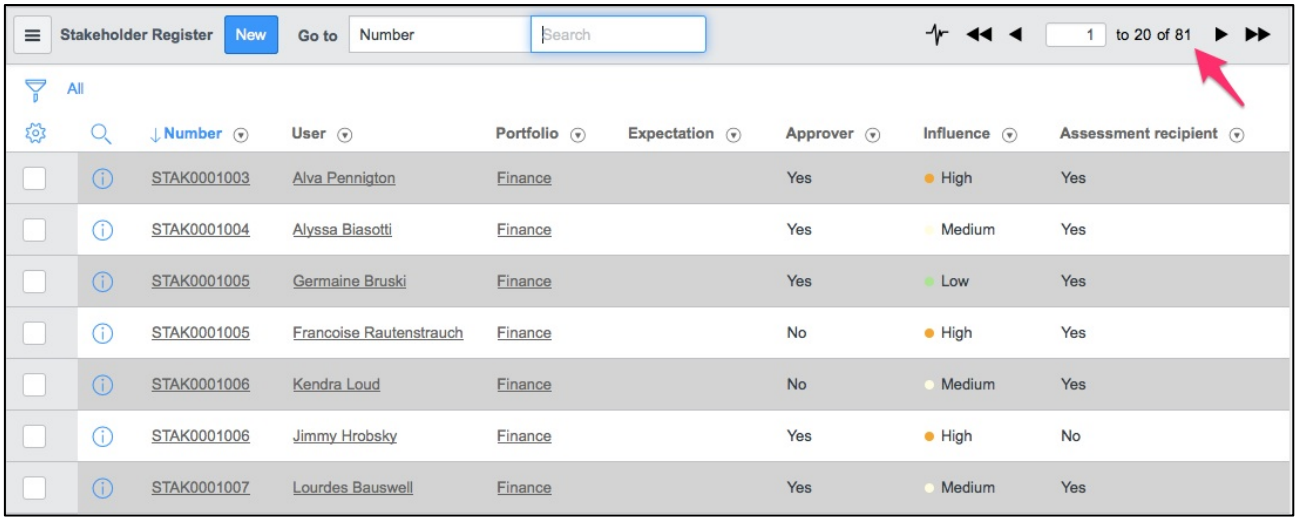
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Demand Stakeholder Data Confirmation

1. Navigate to **Demand > Stakeholders**.



2. Confirm that you have stakeholder records in your instance; you should have about 80 records.



Number	User	Portfolio	Expectation	Approver	Influence	Assessment recipient
STAK0001003	Alva Pennington	Finance		Yes	High	Yes
STAK0001004	Alyssa Biasotti	Finance		Yes	Medium	Yes
STAK0001005	Germaine Bruski	Finance		Yes	Low	Yes
STAK0001005	Francoise Rautenstrauch	Finance		No	High	Yes
STAK0001006	Kendra Loud	Finance		No	Medium	Yes
STAK0001006	Jimmy Hrobsky	Finance		Yes	High	No
STAK0001007	Lourdes Bauswell	Finance		Yes	Medium	Yes

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Project Properties

1. Navigate to **Project > Settings > Preferences** & Confirm the following properties are set to **YES**.
   - Calculate ROI percentage based on a projects estimated cost and its net value.
   - Display the Gantt chart in WBS ordering.
   - Automatically close project milestone tasks when they change to work state.

2. Click **Save**.

   You should see the following screen with confirmation that the properties were updated:



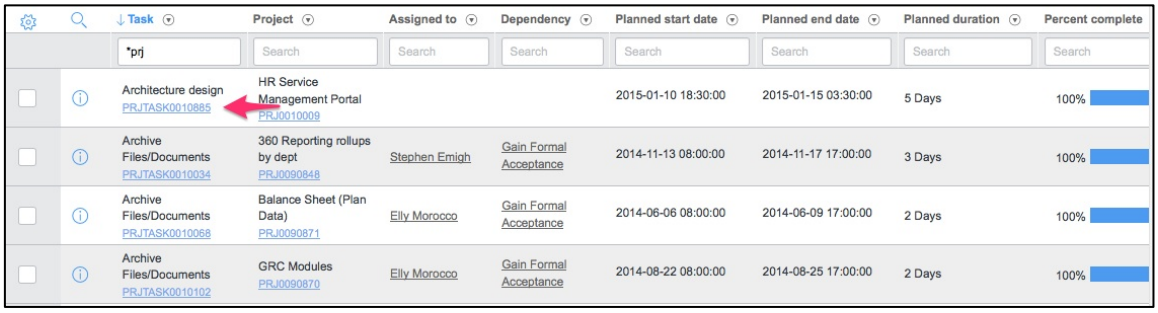
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Add Two Related Lists to Project Task Form

1. Navigate to **Project > Tasks > All**.



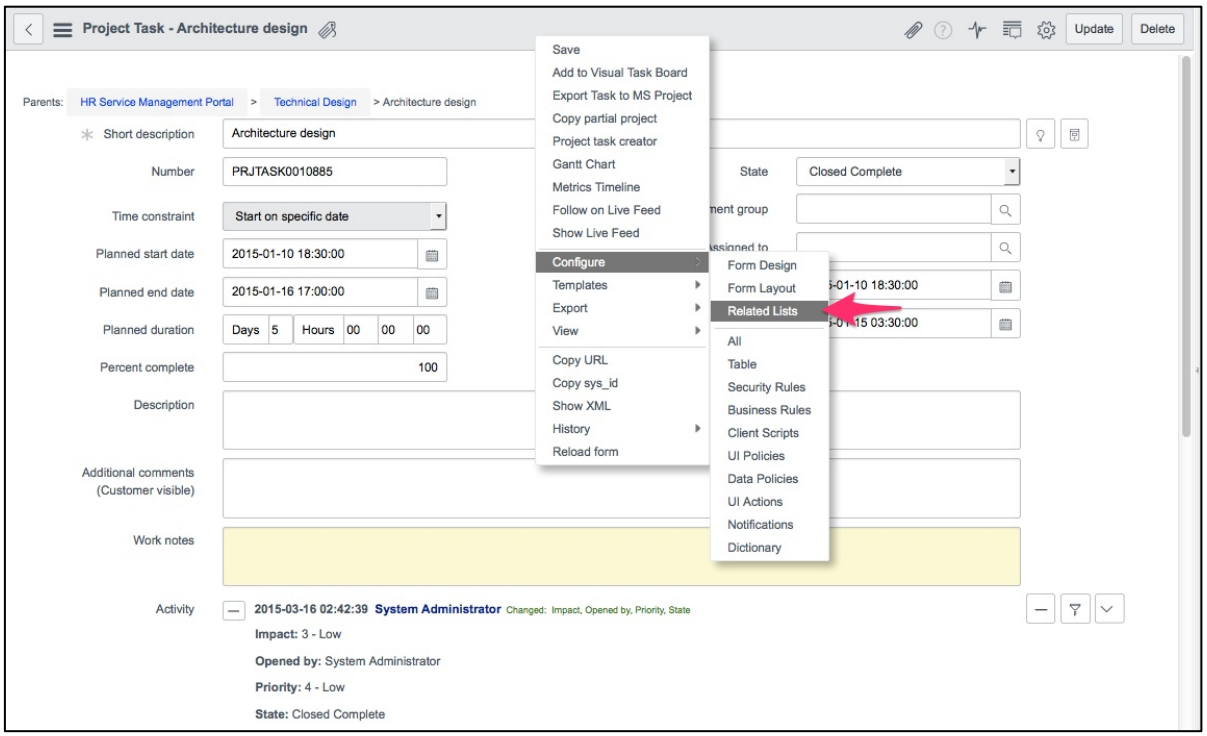
2. Open any of the tasks by clicking the **number**.



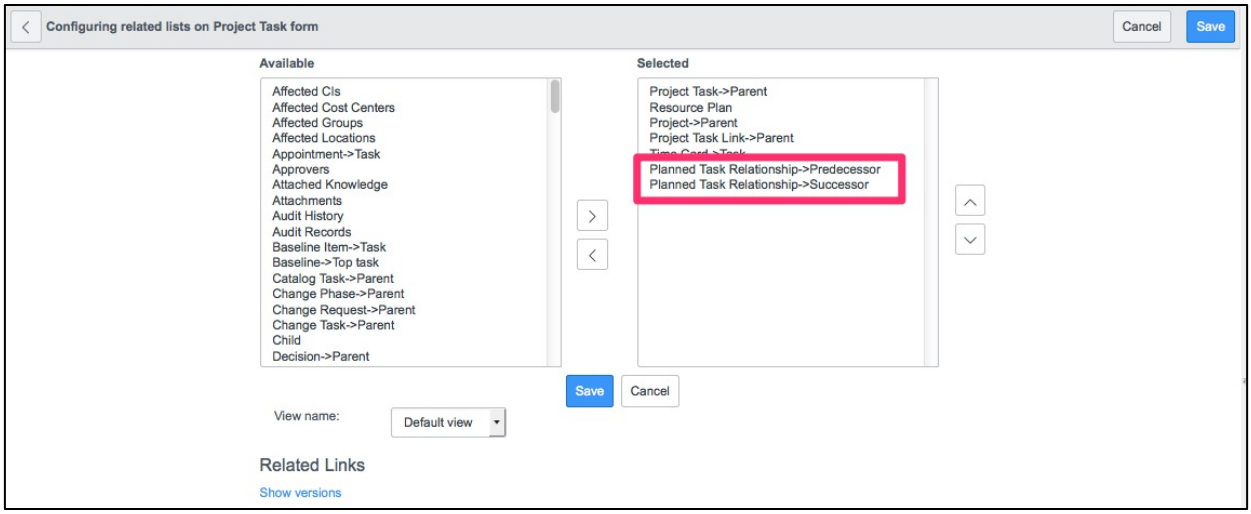
3. On the project task form, **Right-click** the **Project Task header**.

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4. From the context menu list, select **Configure > Related Lists**.



5. Confirm that **Planned Task Relationship->Child** and **Planned Task Relationship->Parent** are in the right-side panel. (The names will change once you **Save**.)



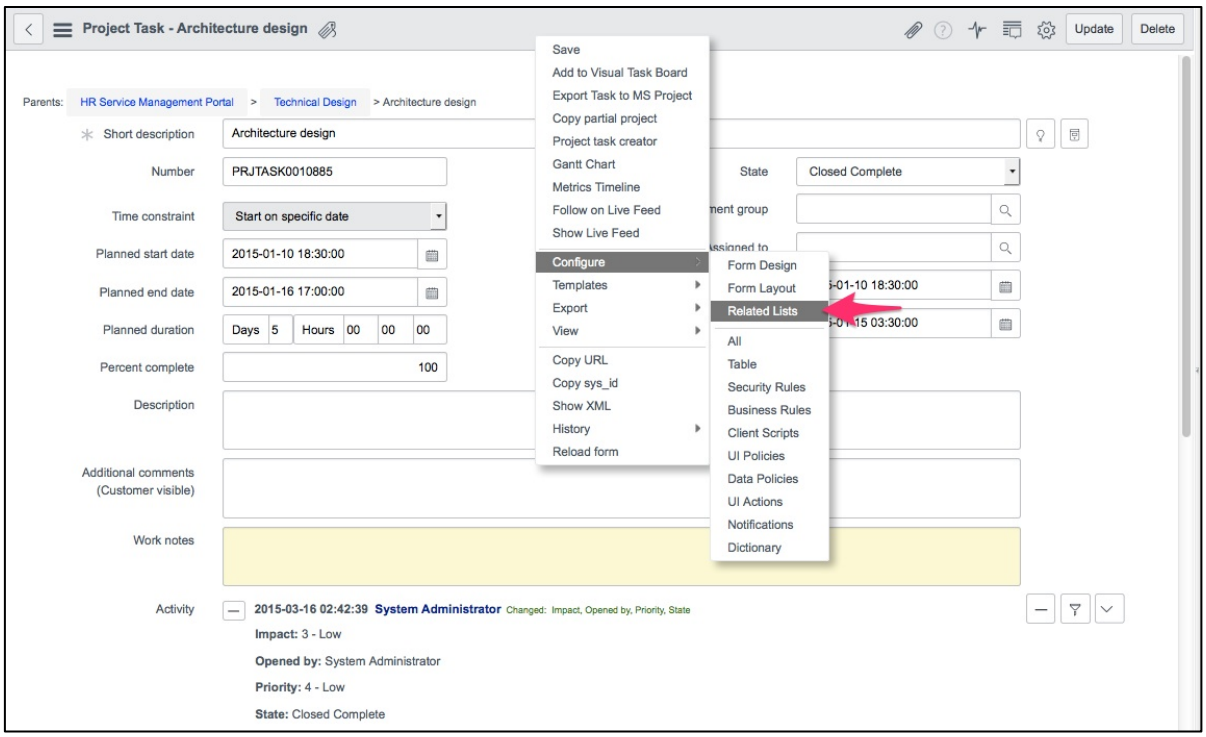
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6. If they are not in the right-side panel, find them in the Available slush bucket and double click both **Planned Task Relationship->Child** and **Planned Task Relationship->Parent** that will add them to the right-side panel.

7. Click **Save**.

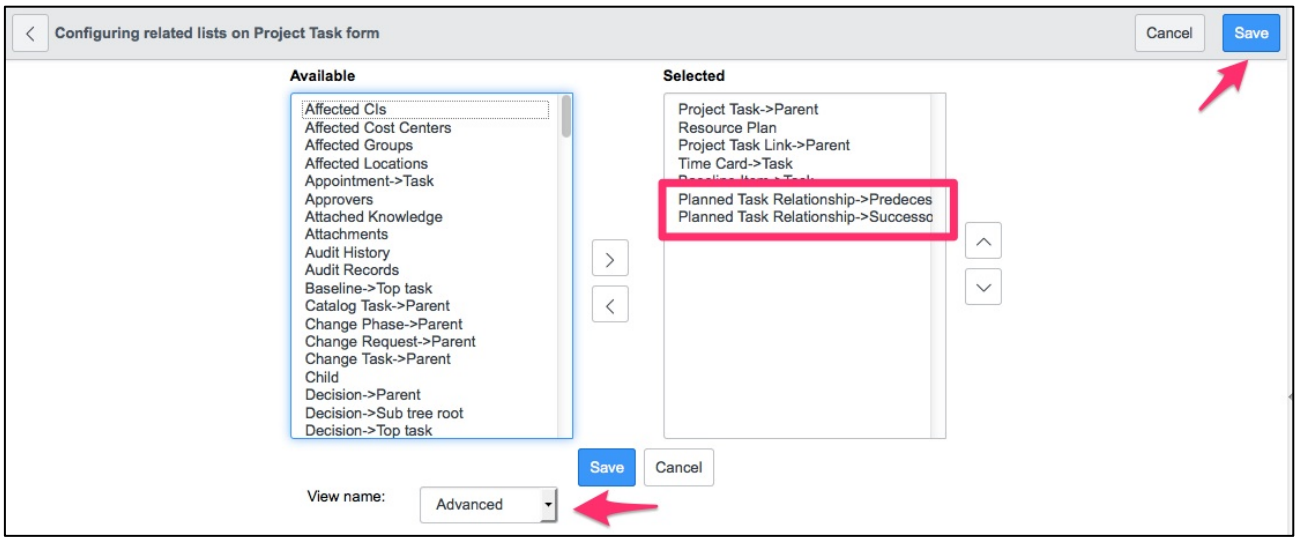
8. On the project task form, **Right-click** the **Project Task header**. (*Yes, again*)

9. From the context menu list, select **Configure > Related Lists**.



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10. Select the **Advanced** View.

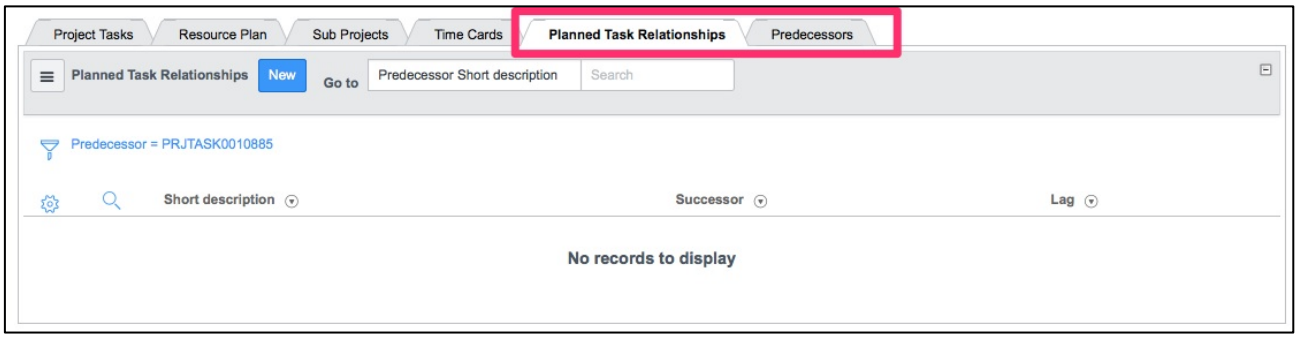


11. Confirm that **Planned Task Relationship->Child** and **Planned Task Relationship->Parent** are in the right-side panel. (The names will change once you Save)

12. If they are not in the right-side panel, find them in the Available slush bucket and double click both **Planned Task Relationship->Child** and **Planned Task Relationship->Parent** which will add them to the right-side panel.

13. Click **Save**.

14. Scroll down to the related list area to confirm **Project Task Relationships** and **Predecessors** related lists have been added.



15. Click **Update** on the Project Task Form to return to list of Project Tasks.

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Set Tabbed View for All Users

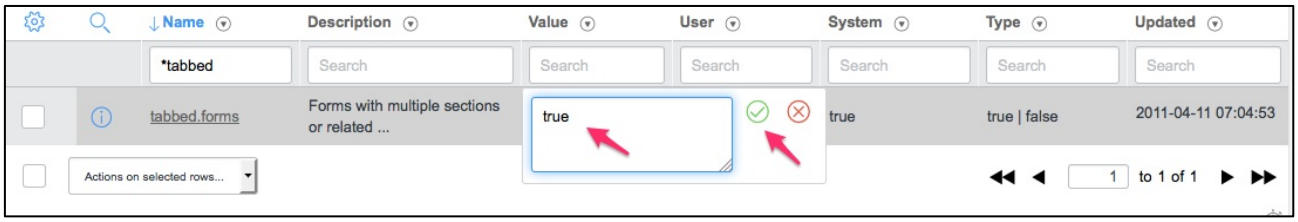
1. Navigate to **User Administration > User Preferences**.



2. Filter the list by ***tabbed**.

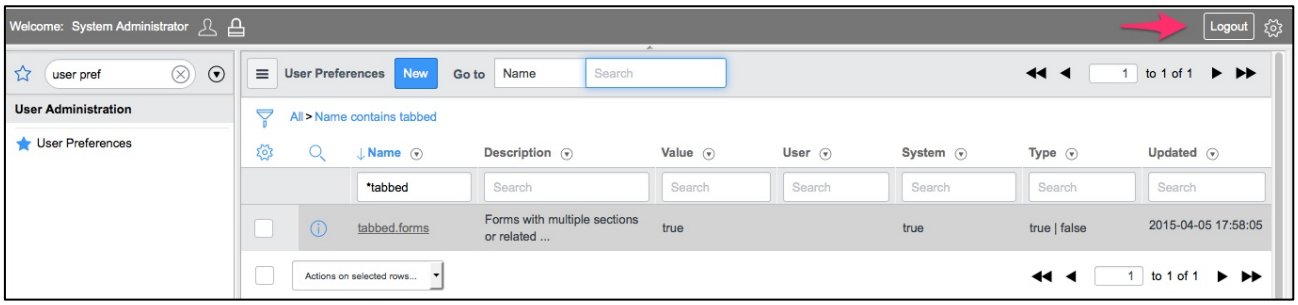


3. Double-click the **Value** and change it to **true**.



4. Click the **green check mark**.

5. **Log Out** and then log back in to allow settings to take effect.



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Lab Goal

Become familiar with Portfolio Management Module and its relationships to Project Management.

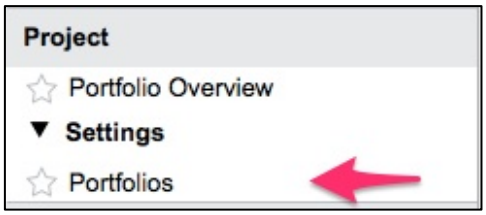
Lab 1
Portfolio Management

Overview

A portfolio is a collection of related projects. Portfolios also include demands starting with the Fuji release. Create a portfolio to measure the progress of several projects at the same time and to create multi-project reports for analysis. A read-only portfolio Gantt chart is available to view all projects in a portfolio.

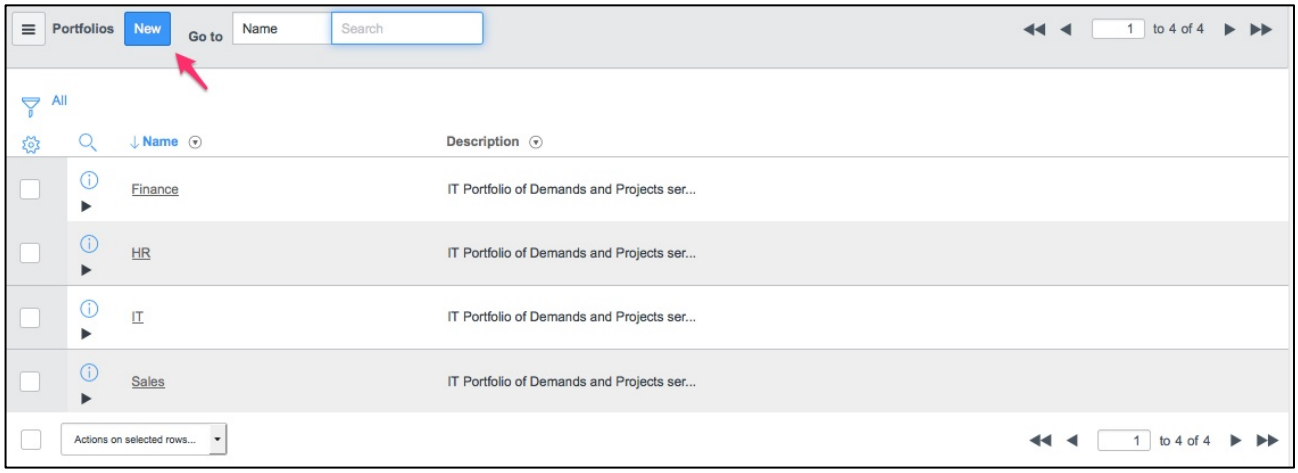
Create a Portfolio

1. Navigate to **Project > Settings > Portfolios**.

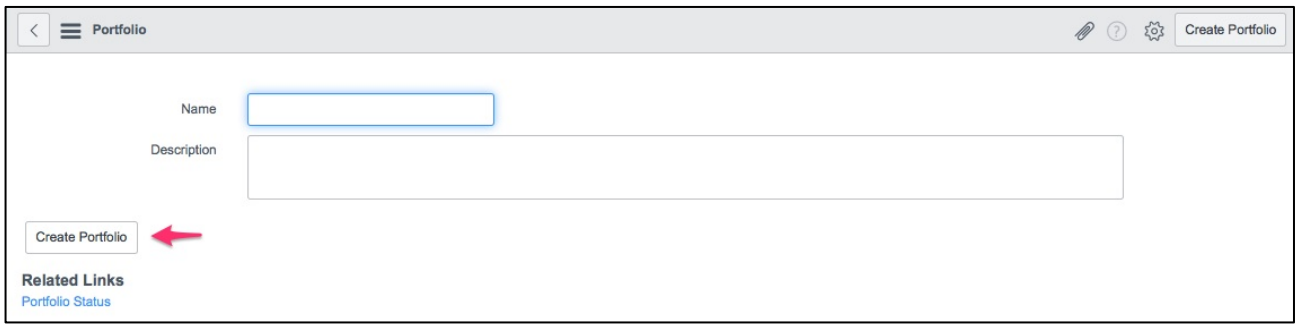


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2. On the list in the right panel, click the **New** button.



3. Enter a unique **Name** that summarizes the projects and demands included in this portfolio.



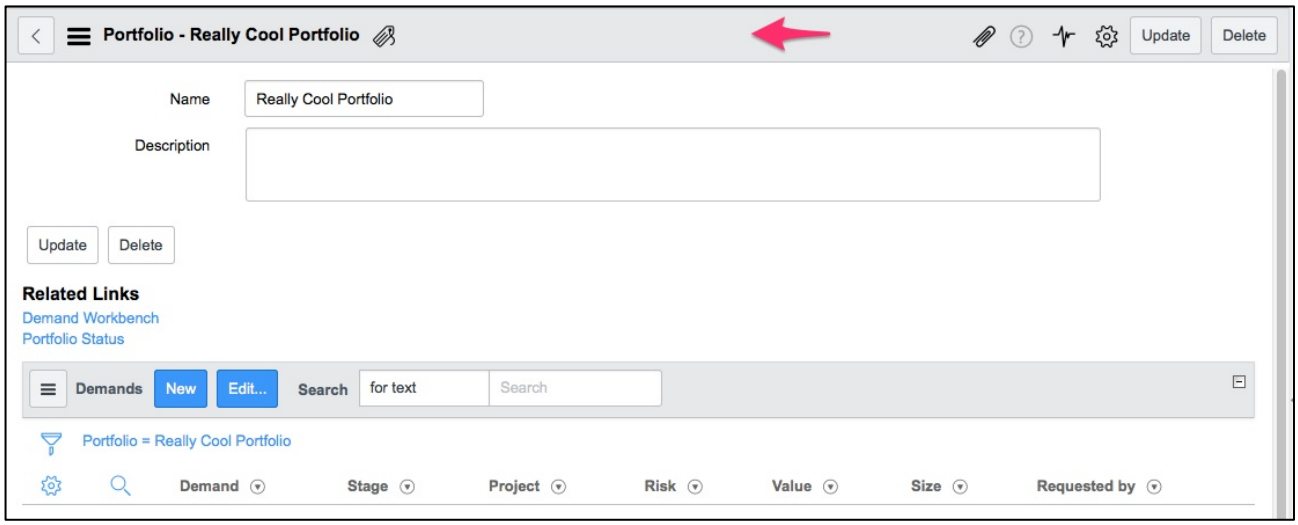
4. Enter a **Description** for the portfolio that adequately explains the various projects and demands attached to it.

5. Click **Create Portfolio**.

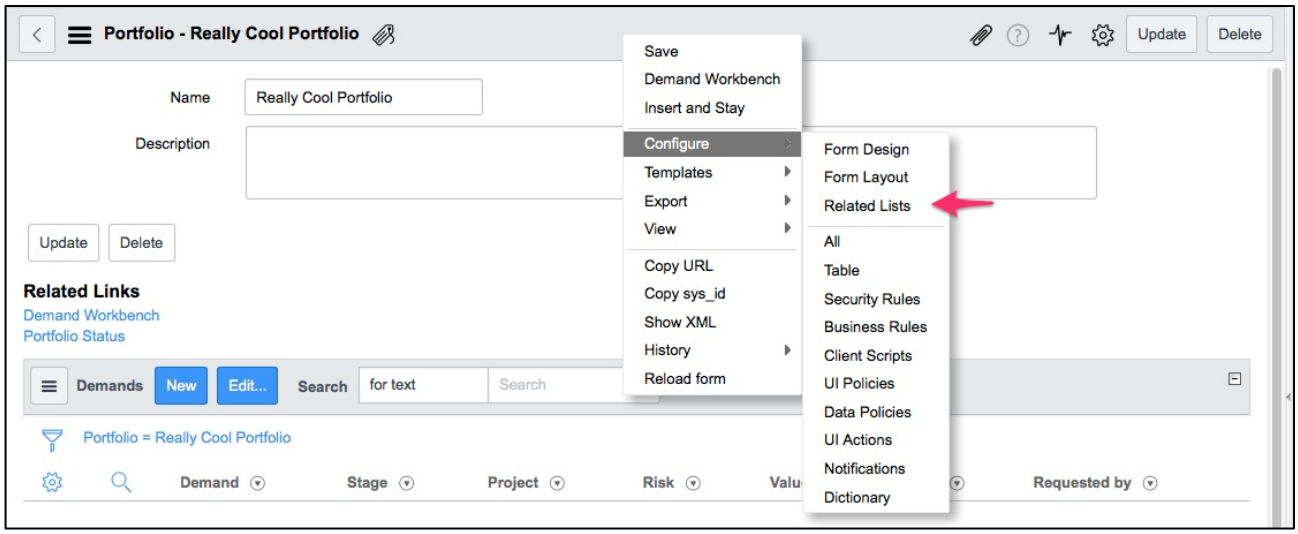
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Add Stakeholder Register Related List to Portfolio Form

1. On the Portfolio form, **Right-click** anywhere on the **Portfolio Header**

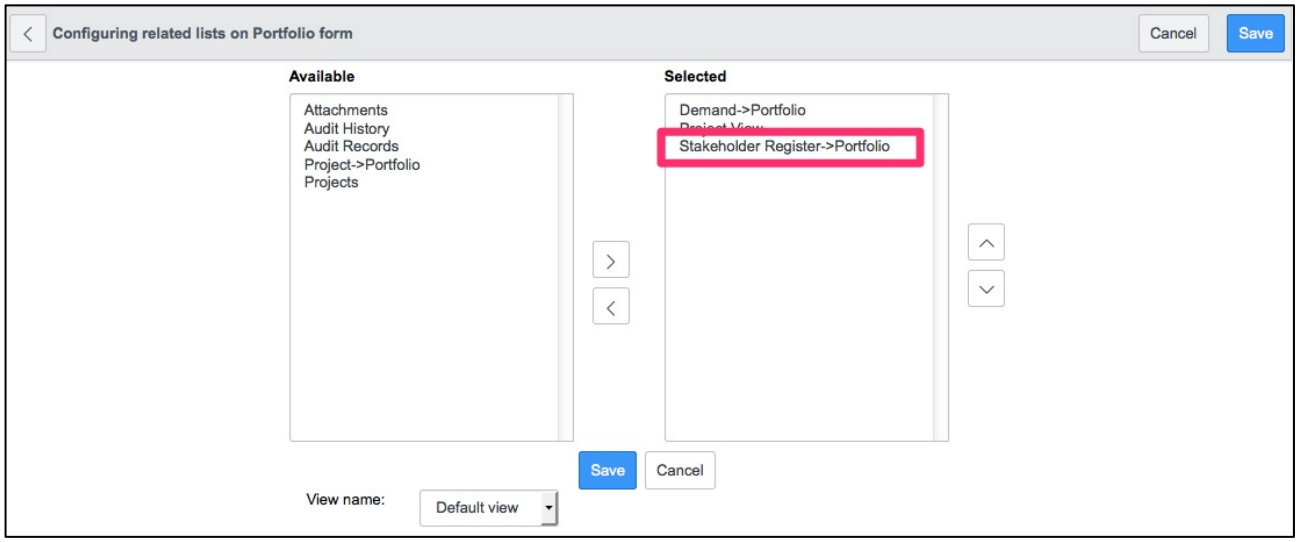


2. From the context menu list, select **Configure > Related Lists**.



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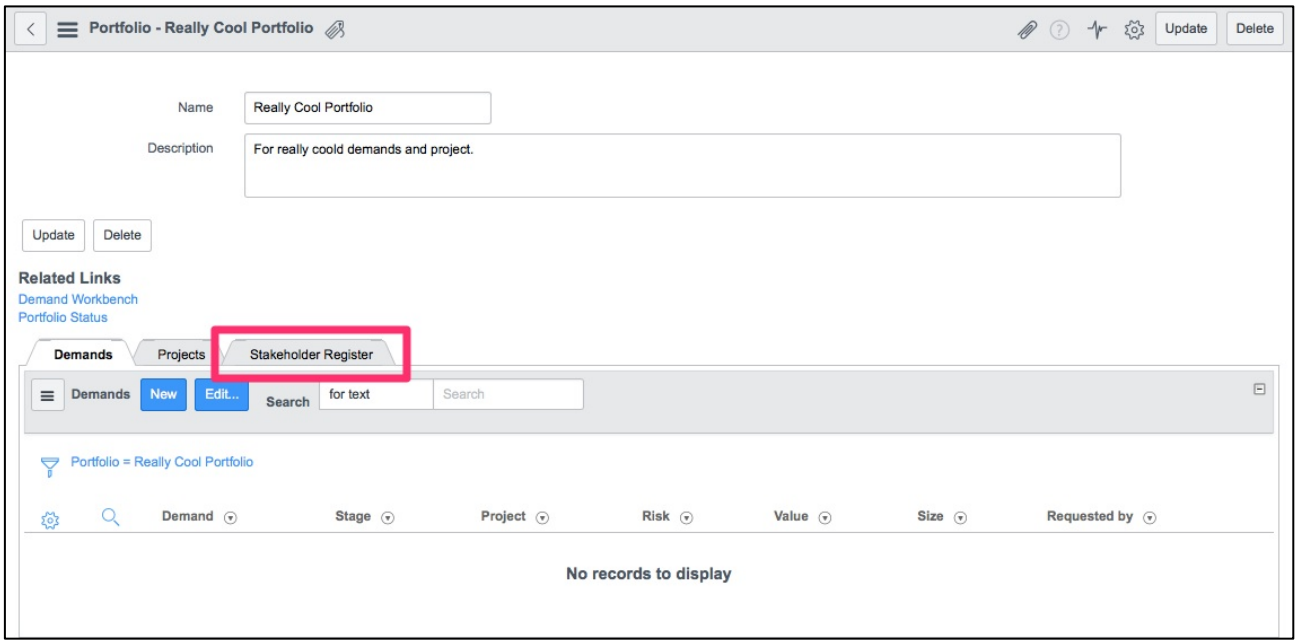
3. Confirm that **Stakeholder Register>Portfolio** is in the right panel.



4. If it is not in the right side panel, find it in the **Available** slush bucket and double click it.

5. Click **Save**.

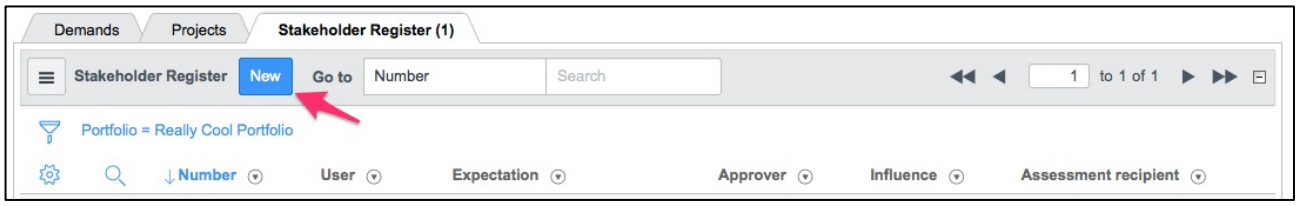
6. Your Portfolio should now include the **Stakeholder Register** related list highlighted below:



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Add Stakeholders to the Portfolio

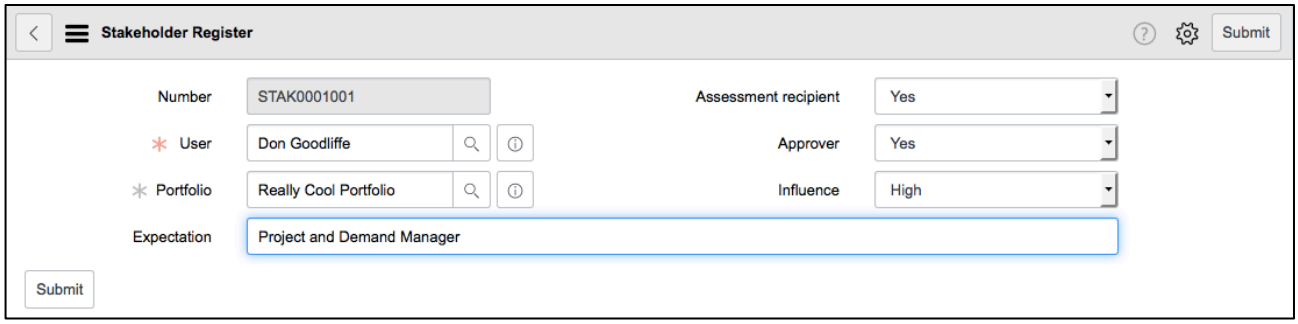
1. Open the **Stakeholder Register** tab.



2. Click **New.**

3. Provide the following information.

   User: **Don Goodlife**
   Assessment recipient: **Yes**
   Approver: **Yes**
   Influence: **High**
   Expectation: Describe the person's involvement with the portfolio. **Project and Demand Manager**.

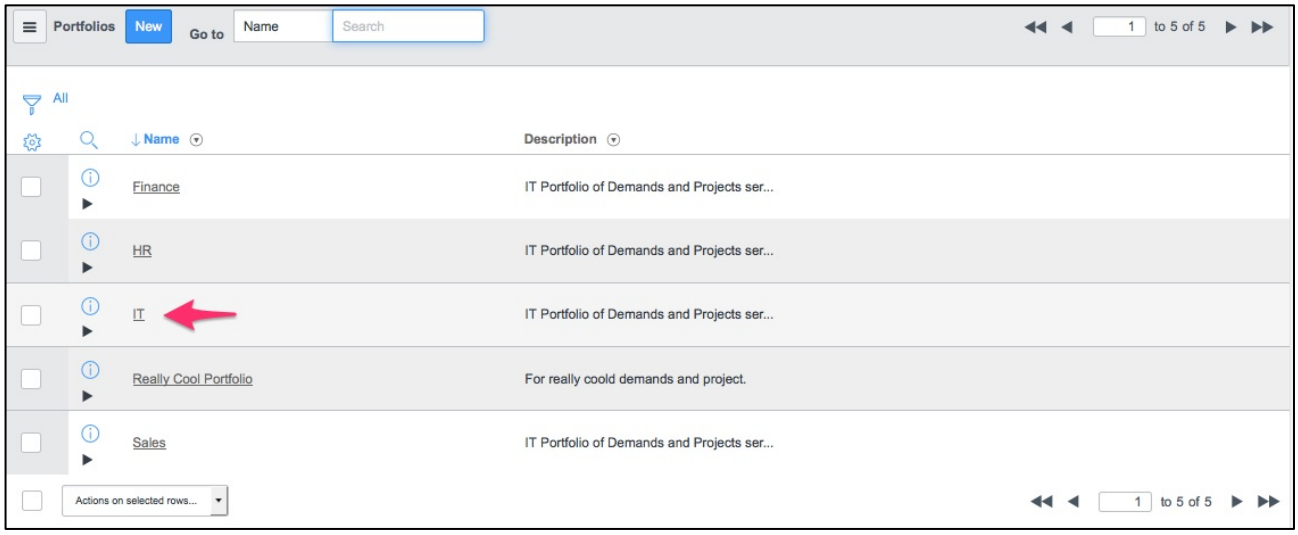


4. Click **Submit**. You return to the Portfolio Record.

5. On the Portfolio record, click **Update**. (You will be returned to the list of Portfolios)

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6. From the list of Portfolios, click to open the **IT** Portfolio.

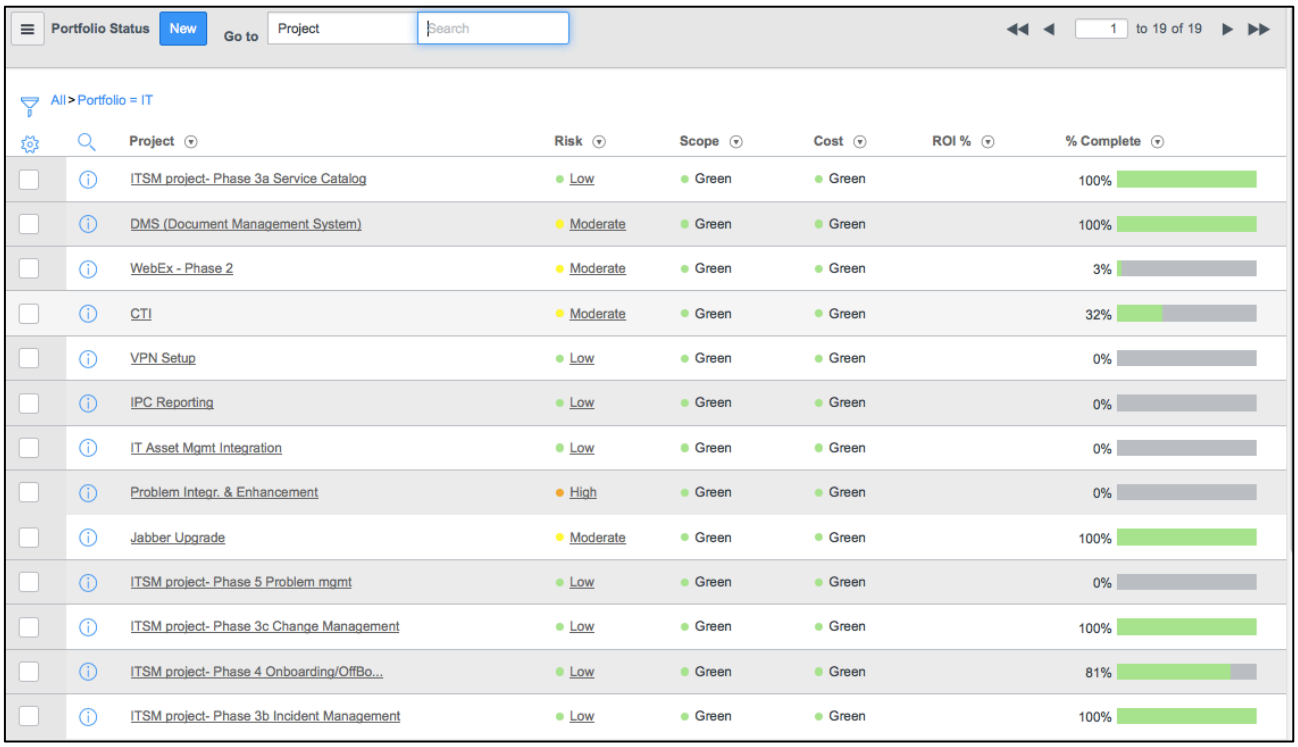


7. Note that there are several Demands, Projects and Stakeholder records within the related list.

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8. Click on **Portfolio Status** to be taken to a list of Projects.



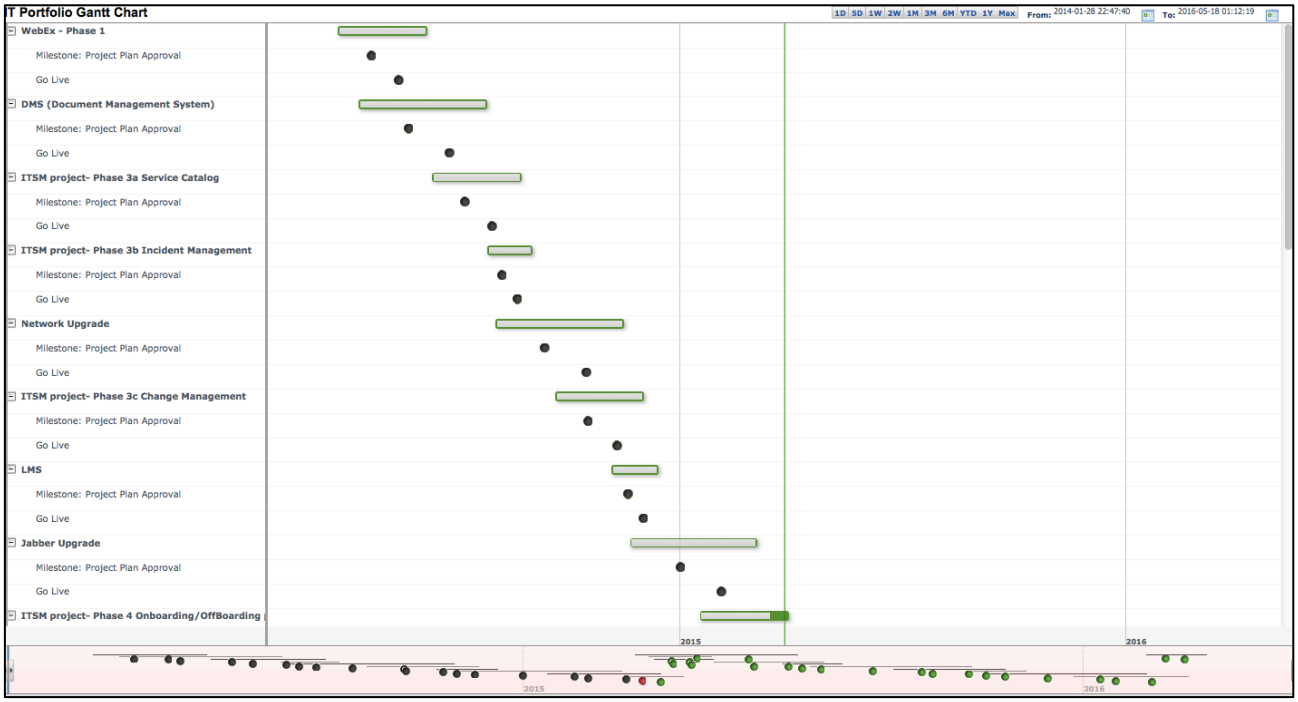


9. Click the **browser back button** to return to the **IT** Portfolio.

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10. Click on **Portfolio Gantt Chart** to open a new tab with the read only Gantt chart of the Portfolio.





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Lab Goal

Become familiar with the Project Management application.

Lab 2
Project Management

Project Management Overview (4 pages)

The Project Management application is a suite of tools that aids in managing projects, tasks, and resources. It provides the ability to create and manage projects of all sizes, from small projects with a few tasks to large portfolios of projects that contain complex tasks with various relationships and dependencies.

Project management includes tools to help you create, view, and manage projects:

- **Project workbench** gives project managers the ability to manage the different aspects of a project from a single page. This workbench supports both Project Management and Application Lifecycle Management applications, allowing for a hybrid approach to project management. Project managers can create projects that combine both Waterfall and Agile methodologies by using **Waterfall, Agile,** and **Test phases**. The **Project Workbench** is available starting with the **Fuji release**.
- **Project templates** define the basic structure of a project, including project tasks and sub-tasks, attachments, and other project information. The project template feature gives project managers a simple way to create, Save, and reuse this project structure.

Project Management also includes features that enable you to achieve your project goals in alignment with the other activities your organization is managing with ServiceNow, such as:

- **Integration** with other features and applications on the ServiceNow platform, such as change management, resource management, and reports.
- Easy-to-read **Gantt charts** and **Work Breakdown Structure** lists that help you visualize large projects with complex relationships and dependencies.

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Key Terms

Portfolio: a collection of projects managed as a group to achieve strategic and operational objectives.

Project: any planned, collaborative effort that is designed to achieve an objective.

Agile Project: any planned, collaborative effort that is designed to achieve an objective and uses Agile.

Project Workbench: a single page that presents project information in two panes. The upper pane includes a project timeline and displays the project phases and milestones. The lower pane presents details about the currently selected phase in either a list view or visual task board.

Phase: one stage or one segment of a project. Three types of phases can be added to the timeline in the project workbench:

- **Waterfall phase**: a waterfall phase contains project tasks. A project can have multiple waterfall phases.
- **Agile phase**: an agile phase contains stories. A project can have one Agile phase.

Test phase: a test phase contains test cases and can also include a team assignment. A project can have one test phase.

Story: a brief statement of a product requirement or a customer business case that is used in the scrum method of agile software development. Typically, stories are expressed in plain language to help the reader understand what the software should accomplish.

Task: a unit of work within a project. Projects typically contain several tasks.

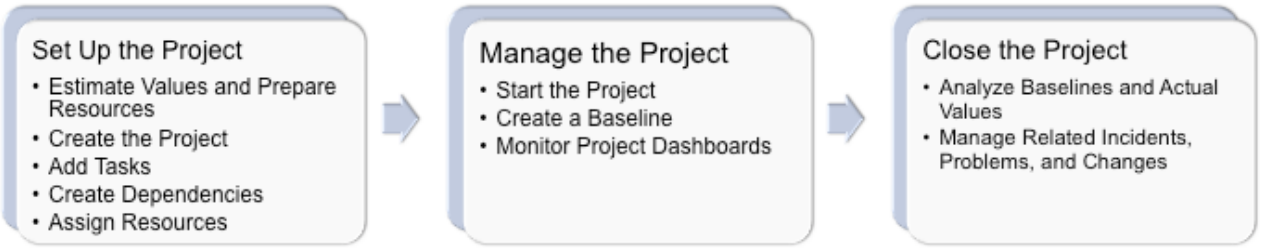
Test Case: a collection of related tests. A test case is Saved as part of a test suite and can be added to a test plan.

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Basics of Project Management

The Project application helps you plan and track projects, plus it integrates with other ServiceNow applications. For example, if an incident, problem, or change is large enough to require an entire project to manage, create projects from an incident, problem, or change form.

There are several paths available to manage a project. The best path usually depends on business needs. The steps below are designed to get a project up and running with the minimum amount of effort. Alternative methods to these procedures are also explained.



Setting up a project involves deciding on an approach for creating and linking project tasks and making sure the necessary users and groups are created in ServiceNow so you can assign them to project tasks.

Plan the Project

Before creating a project, consider the following questions and issues:

Do you want a top-down or bottom-up approach to tasking?

- **Top-down tasking** involves creating a project first, then identifying major project phases. Later on, phases can be broken down into tasks and subtasks. The emphasis is on creating estimates for high-level items such as phases and parent tasks and then building the project down from there toward a more detailed level. Use caution when creating tasks for top-down tasking. If you first create a project and then create a task under it with a start-on date later than the project's start date, the project shifts later to start on the task start date. The Project application supports bottom-up tasking better.
- **Bottom-up tasking** involves creating several sets of small tasks and estimating task items such as effort, cost, and duration. These estimations are then aggregated into high-level parent tasks (rollup tasks) and phases. The emphasis is on estimating smaller chunks of work as accurately as possible first, then letting those estimations roll up into parent tasks, phases, and the project itself.

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Is the project part of a larger portfolio of projects?

- Also consider portfolio planning and how the project relates to similar projects or initiatives.

What types of dependencies will the tasks have with other tasks?

- The Project application supports only finish-to-start dependencies.

Can milestones and project baselines help manage a project?

- A **milestone** is a project task with a duration of 0. Use milestones to indicate important dates in a project. If necessary, create dependencies between tasks and milestones so that a task does not start until a milestone has been reached.
- A **baseline** is a snapshot of each task's current planned start and end dates at the time the baseline was created. A line appears under each task on the Gantt chart for the original planned start and end dates. The line appears shifted to the left or right depending on whether the task was started early or late. If tasks slip to later dates, the baseline indicator provides an easy way to see how severe the delays will be.

Have the necessary skills, groups, and resources been created in ServiceNow?

- If project tasks will be assigned to different groups or individual resources with the required skills, create users and groups and configure the Skills Management application.

Does an existing incident, problem, or change justify creating a project in order to track it?

Do you want to track project costs?

What goals do you want the project to achieve?

- Every project should have at least one goal. Project goals are saved in the Goal table and can link to any task. In a typical scenario, link one goal to each project and keep the goal's State field up to date.

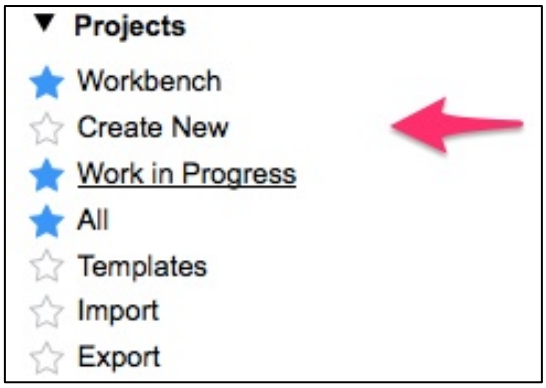
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Create the Project

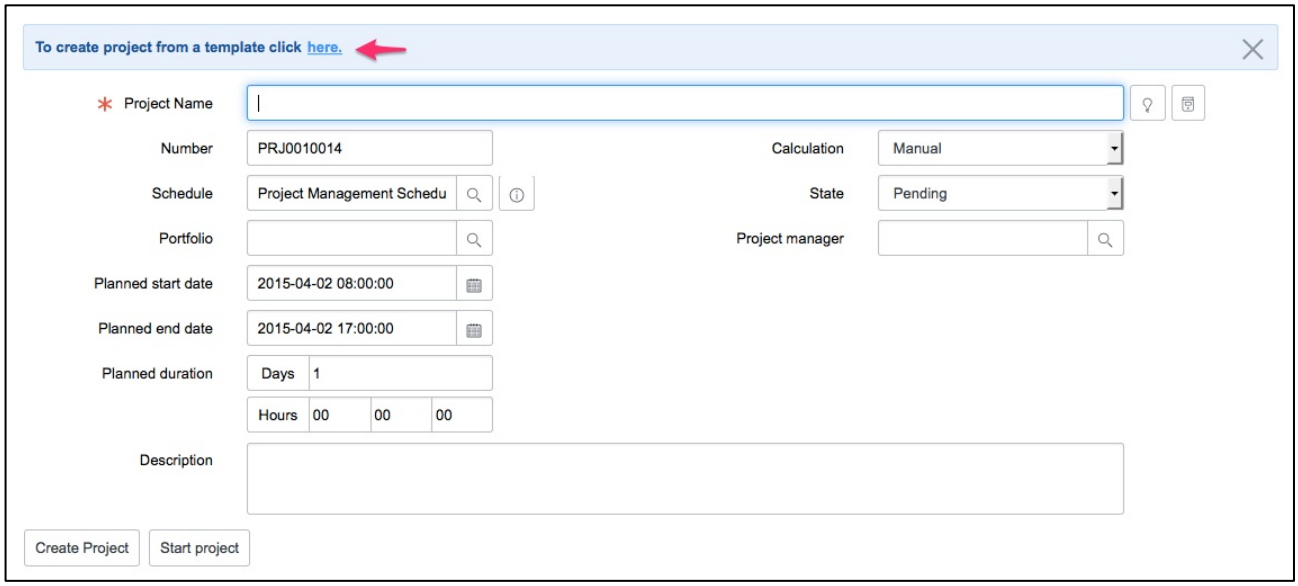
After choosing an approach and gathering initial estimates for the planned start date, estimated cost, and a well-defined business case, you can create the project in the Project Application or in the Project Workbench.

For this portion of the lab we will create the project from the **Project Application** using a template.

1. Navigate to **Project > Projects > Create New**.

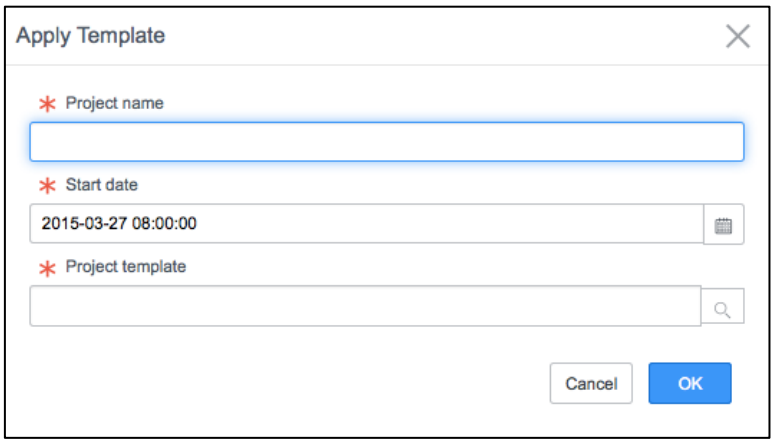


2. To create project from a template click **here**. The arrow points to the link in the image. You will be presented with the following pop-up.



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3. The Apply Template Dialog opens. Provide a **Project Name**.



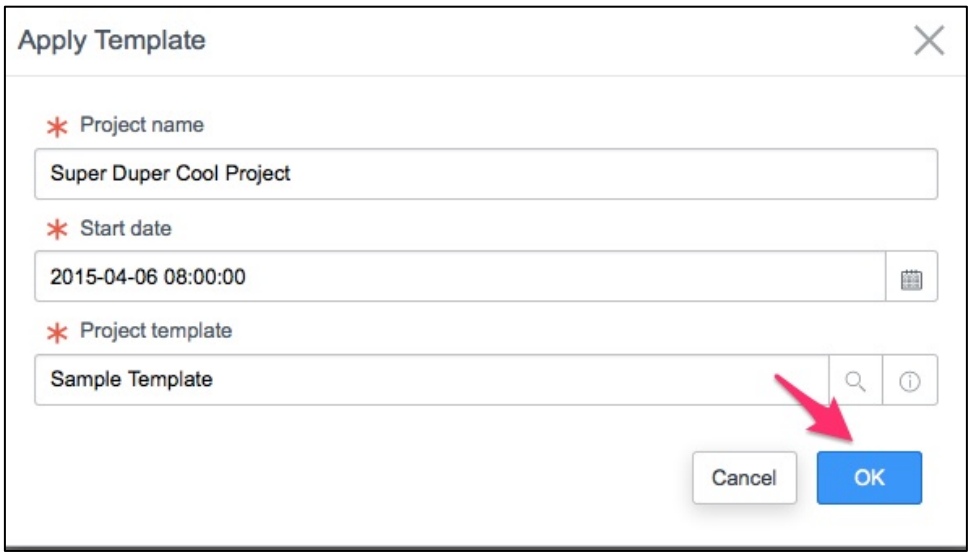
4. **Start date** can be left to default date.

5. Type or search for **Sample Template** for the Project Template.



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6. Once you've selected the template, click **OK.**



Note: This process can take a moment or two. **Do not click OK again** or you will end up applying the template twice.

Once the template has been applied, you return to the Project, which will have a Planned Start and End Date, and 5 Milestone Tasks with related Project Tasks.

Write down your Project Name _____

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Populate the Basic Project Information

1. Complete the form as shown in the example on the next page.

   Project Manager: **Fred Luddy**
   Portfolio: **IT**
   Description: **Really Cool Project Description.**
   Configuration Item: **SAP Human Resources**
   Calculation: **Automatic**

2. Review the **Dates** tab and note the following:

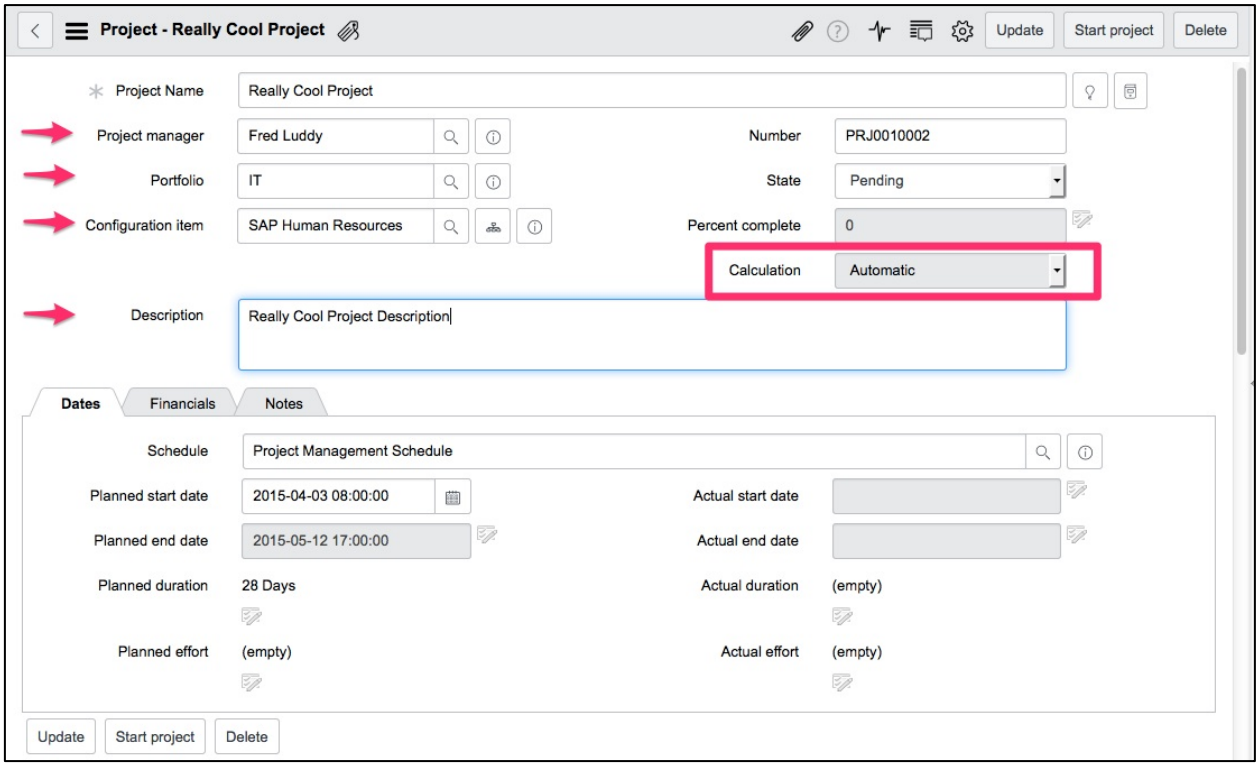
   - **Planned end date** and **Duration** are taken from related tasks created by the template.
   - **Actual start date** and **Actual end date** will be populated once the project has started and all related tasks have been completed.

3. There are two calculation choices: Automatic and Manual. For this lab, select **Automatic**.

   Automatic Calculation
   - A parent task automatically reflects any changes from its dependent and child tasks.
   - New projects created from the Project application are set to automatic calculation by default.
   - Any project created in Eureka or prior releases is set to automatic calculation.

   Manual Calculation
   - Dates on phases do not automatically reflect any changes from dependent and child tasks.
   - New projects created from the project workbench are set to manual calculation by default.
     - Projects created as manual can be changed to automatic.
   - The project timeline reflects the earliest planned start date and latest planned end date based on the project tasks.

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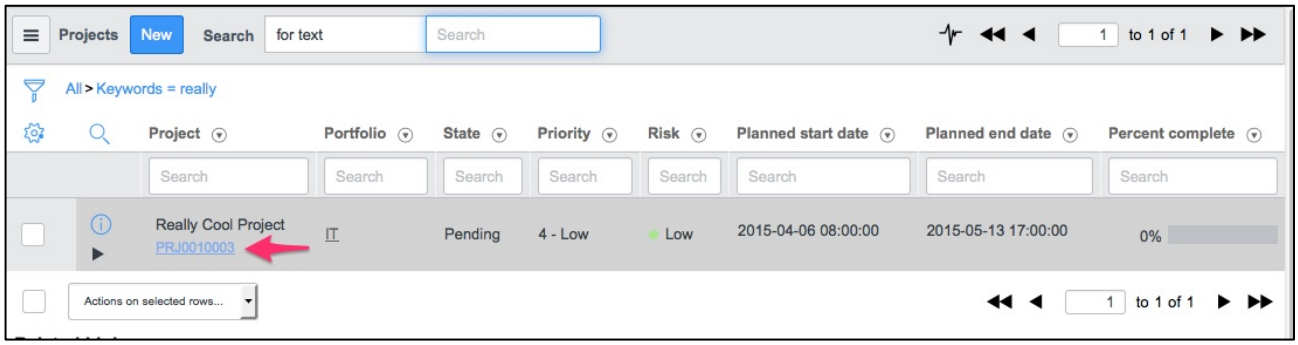


4. Click **Update**.
   Note: You may end up being taken back to a blank Create Project Form. If this happens simply click **Project > Projects > All** from the left Navigation Pane.

5. If your project isn't the first project listed simply search for it by name as denoted below:



6. Find your Project in the list and click the **Project Number** to open the project.

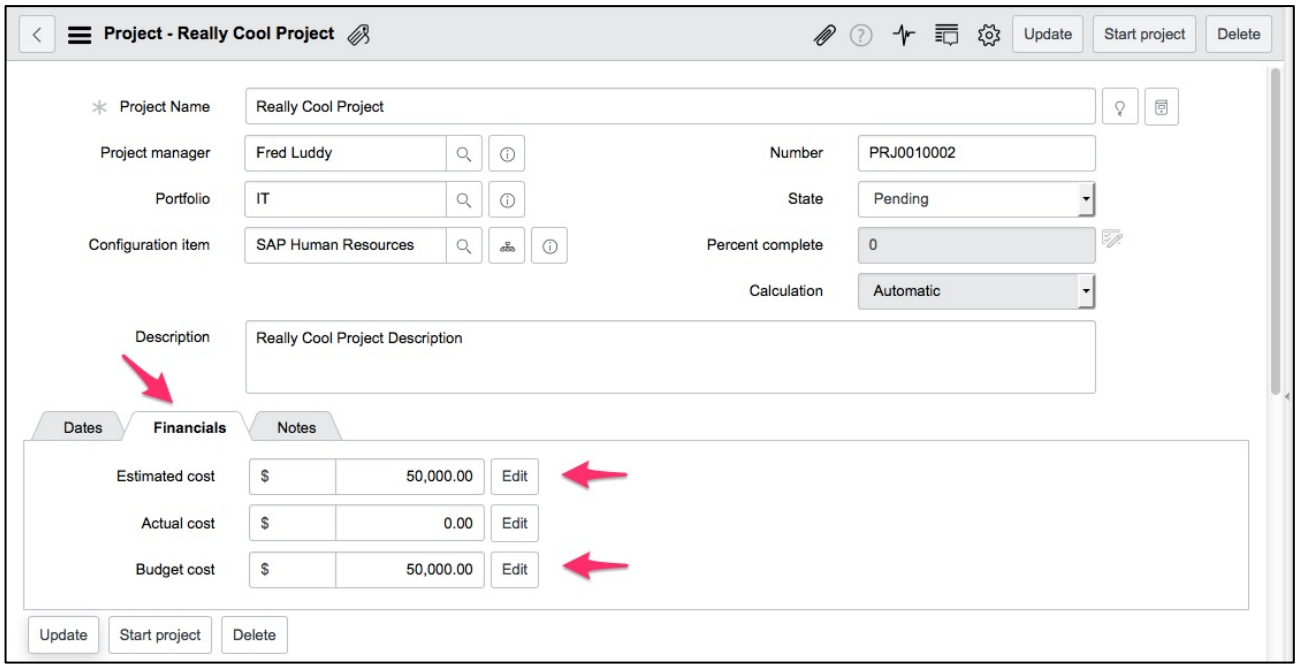


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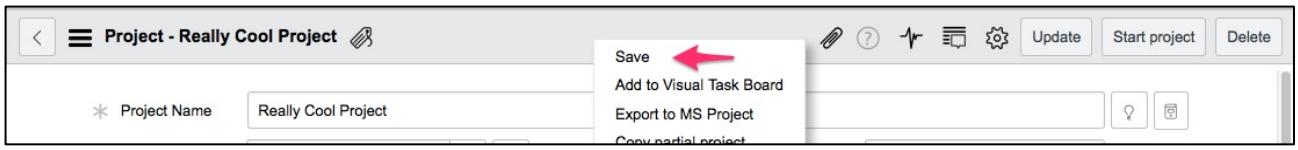
Populate Project Financial information

1. Once your Project has opened find and select the **Financials** tab and complete the following.

   Estimated Cost: **$50,000**.
   Budget Cost: **$50,000.** (*What can I say? We're optimistic.*)



2. **Right-click** the **Project Header** and select **Save.**

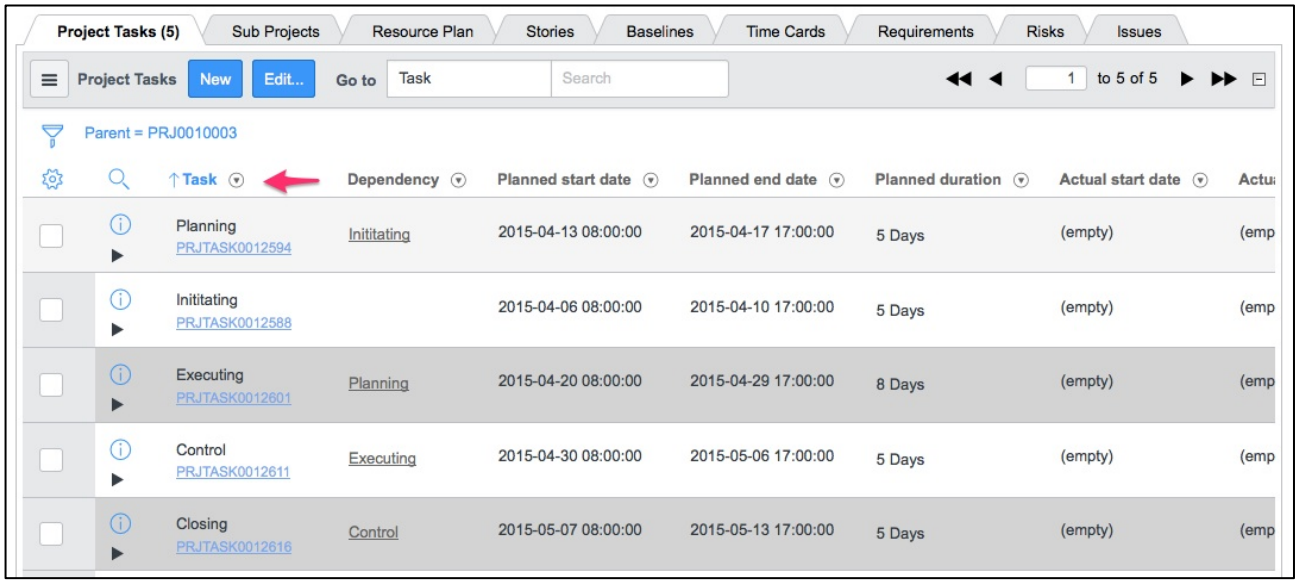


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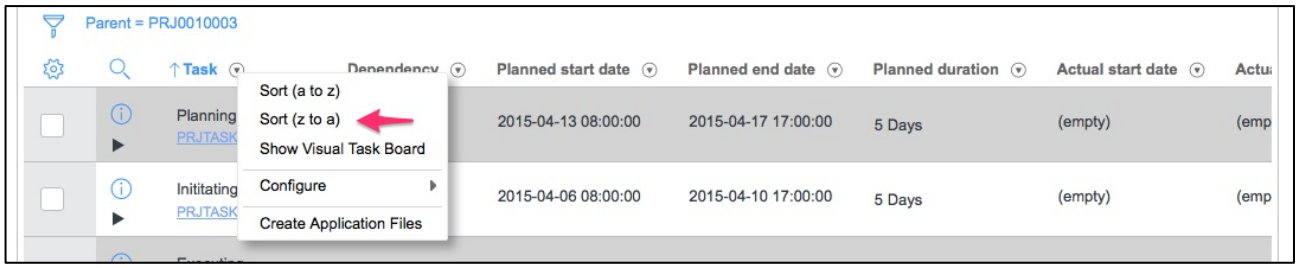
Review and Update Project Tasks

1. Scroll Down to related Lists to view **Project Tasks** related list.

2. Click **arrow down button** next to the word **Task**.

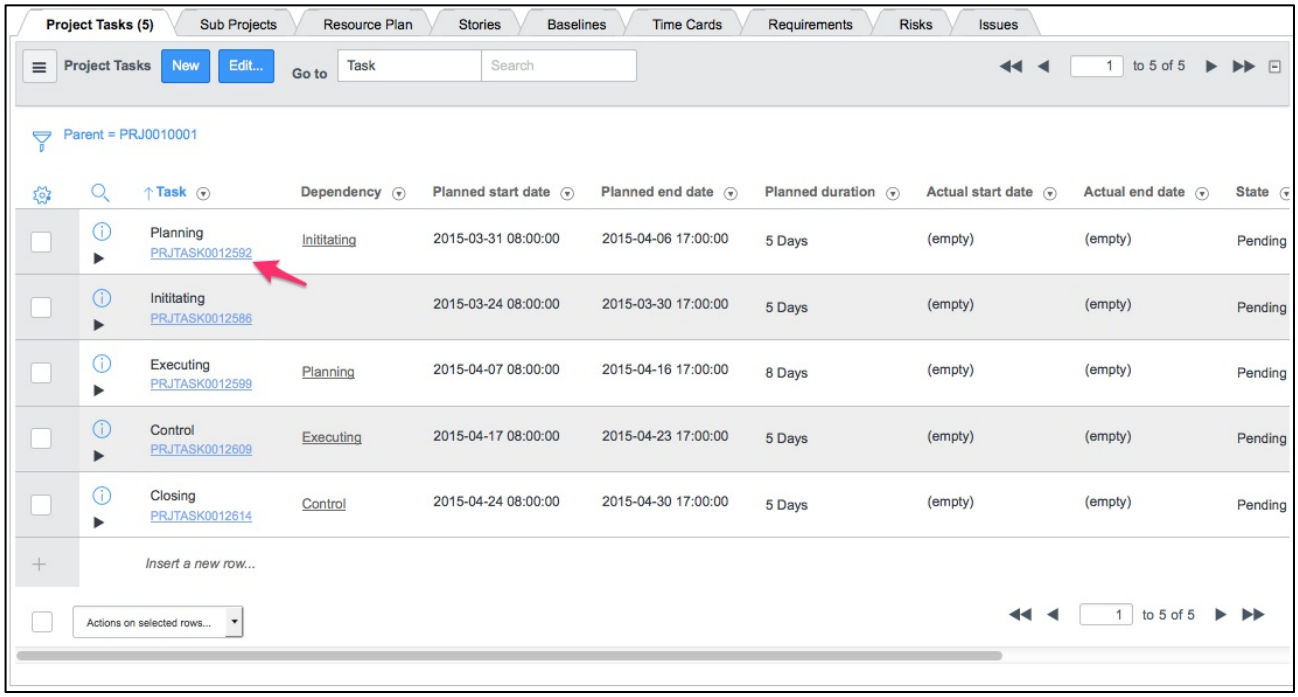


3. Select **Sort** (**z to a**).

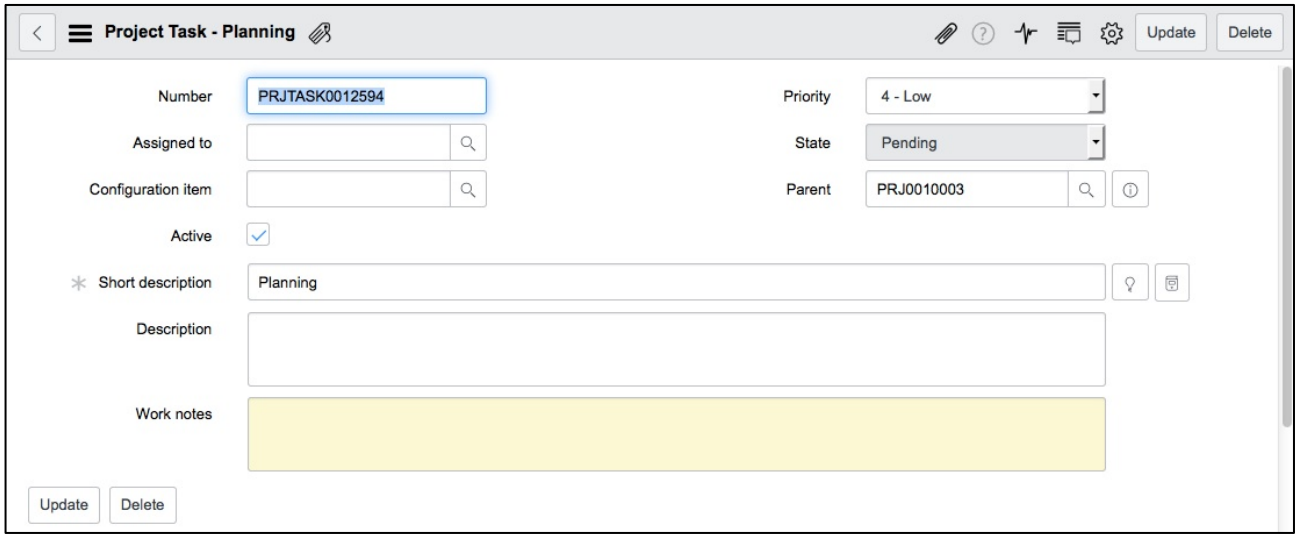


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4. Click the **Number** for the **Planning Task** to open the task.



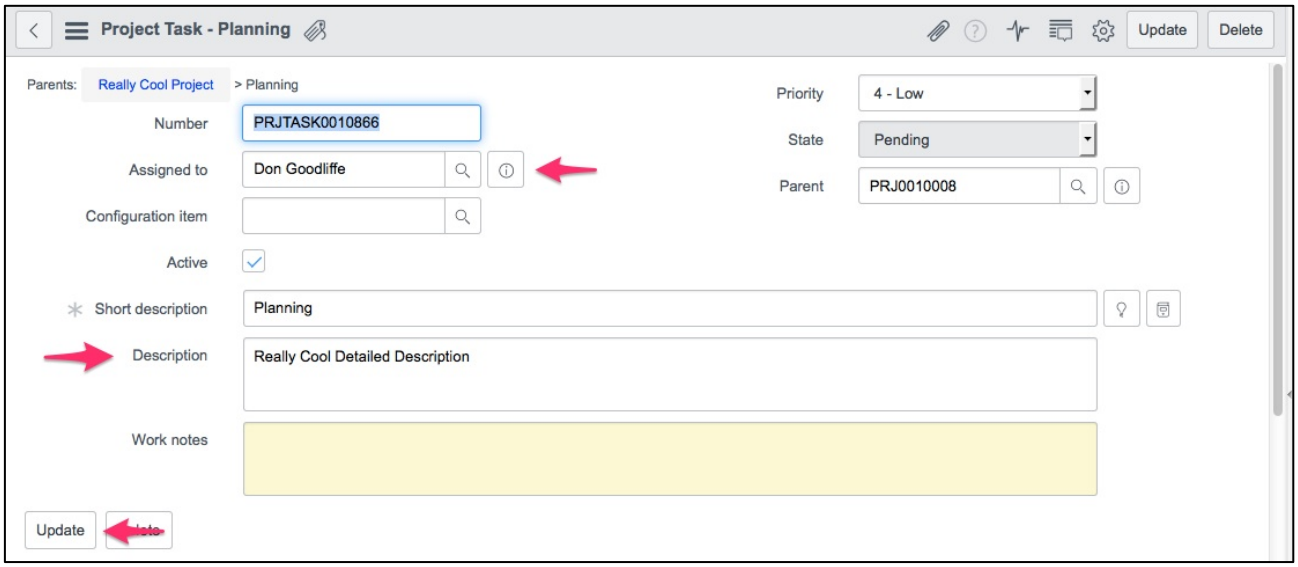
5. Note some data has been auto-populated by the template.



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6. Provide a description and assign the task.

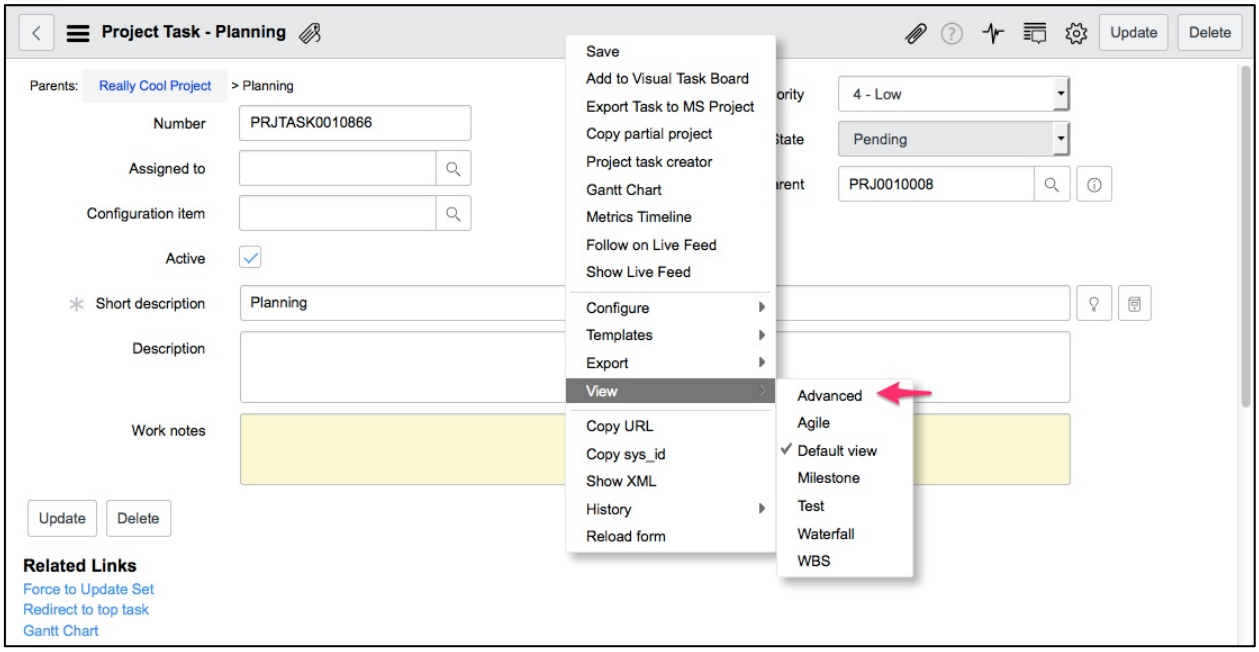
   Assigned To: **Don Goodliffe**
   Description: **Really Cool Detailed Description**



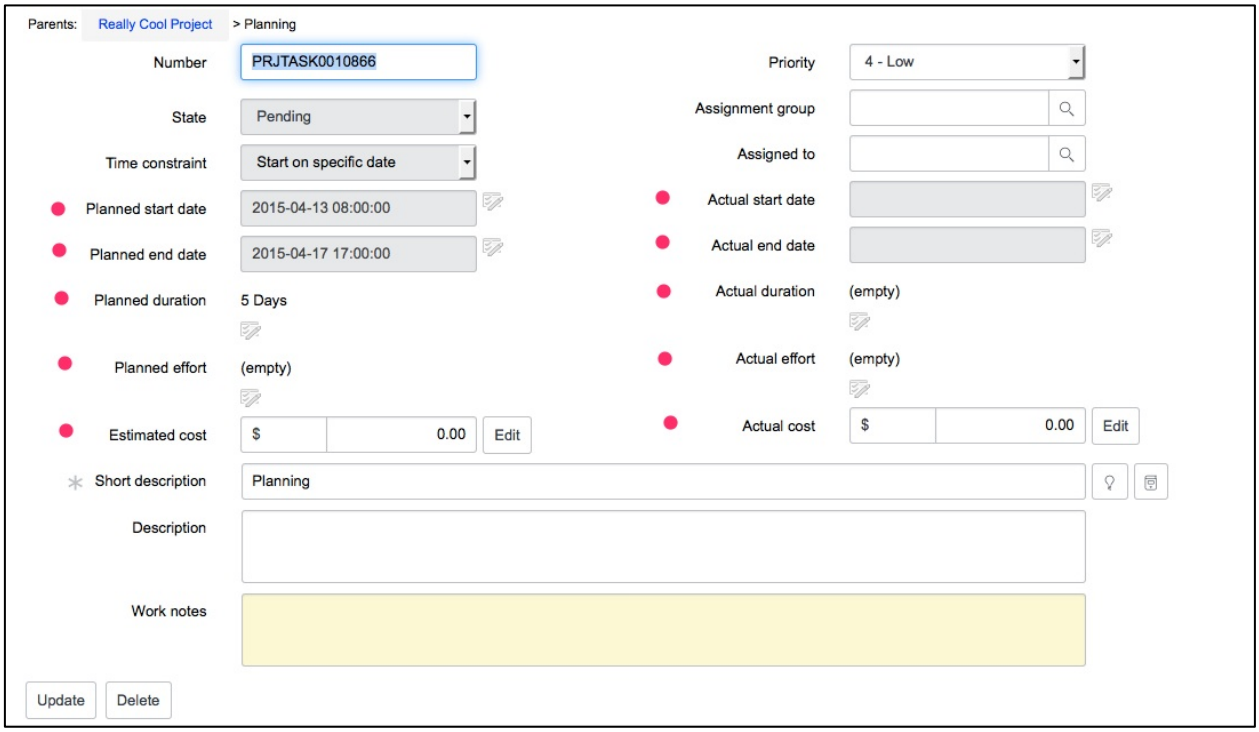
7. Right-click the header and select **Save**.

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8. Right-click the header again and select **View > Advanced**.



9. Note the additional fields. Many are read only as they are populated from child tasks.

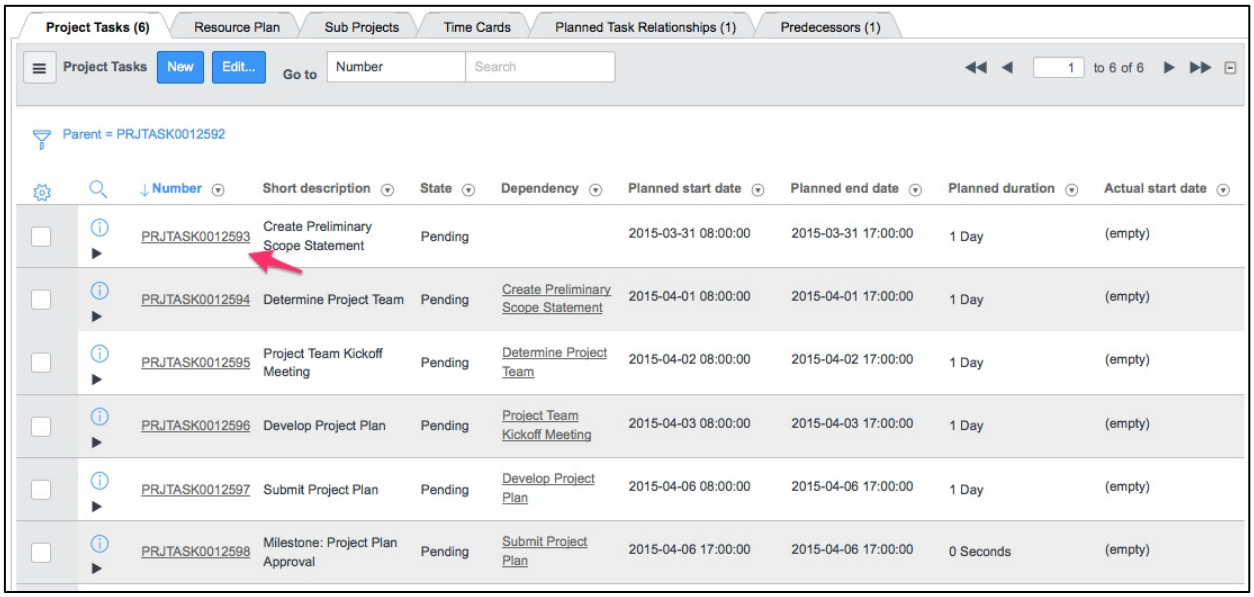


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10. Scroll down and view **Project Tasks** related list.

11. Click the **Number Column** in order to sort the tasks by number.

12. Click the Number for **Create Preliminary Scope Statement** to open task.



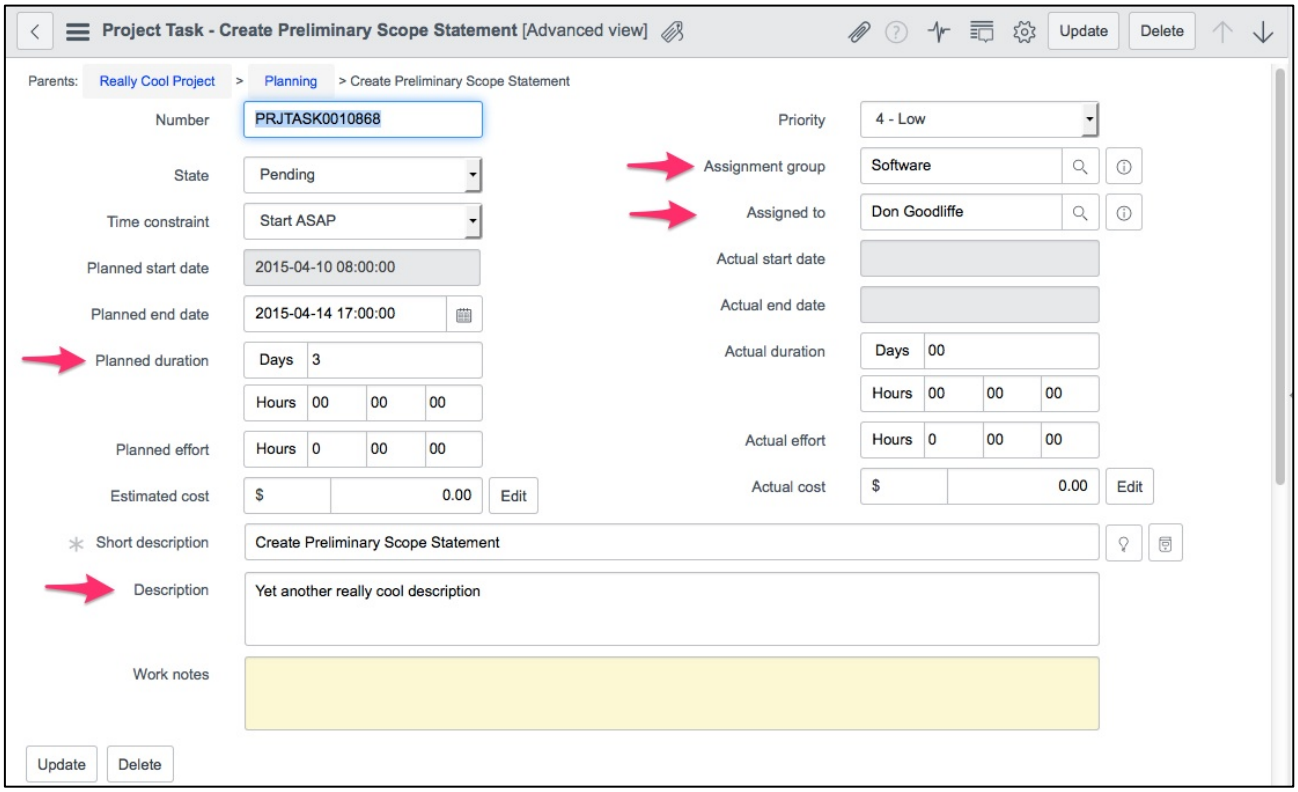
Number	Short description	State	Dependency	Planned start date	Planned end date	Planned duration	Actual start date
PRJTASK0012593	Create Preliminary Scope Statement	Pending		2015-03-31 08:00:00	2015-03-31 17:00:00	1 Day	(empty)
PRJTASK0012594	Determine Project Team	Pending	Create Preliminary Scope Statement	2015-04-01 08:00:00	2015-04-01 17:00:00	1 Day	(empty)
PRJTASK0012595	Project Team Kickoff Meeting	Pending	Determine Project Team	2015-04-02 08:00:00	2015-04-02 17:00:00	1 Day	(empty)
PRJTASK0012596	Develop Project Plan	Pending	Project Team Kickoff Meeting	2015-04-03 08:00:00	2015-04-03 17:00:00	1 Day	(empty)
PRJTASK0012597	Submit Project Plan	Pending	Develop Project Plan	2015-04-06 08:00:00	2015-04-06 17:00:00	1 Day	(empty)
PRJTASK0012598	Milestone: Project Plan Approval	Pending	Submit Project Plan	2015-04-06 17:00:00	2015-04-06 17:00:00	0 Seconds	(empty)

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13. Notice the breadcrumbs across top of page that show the relationships between the current **Task, Project Phase** and **Project**.

14. Update task assignments, duration, and description.

    Assignment Group: **Software**
    Assignee: **Don Goodliffe**
    Planned Duration: **3 days**
    Description: Detailed description of work to be performed. **Yet another really cool description**.

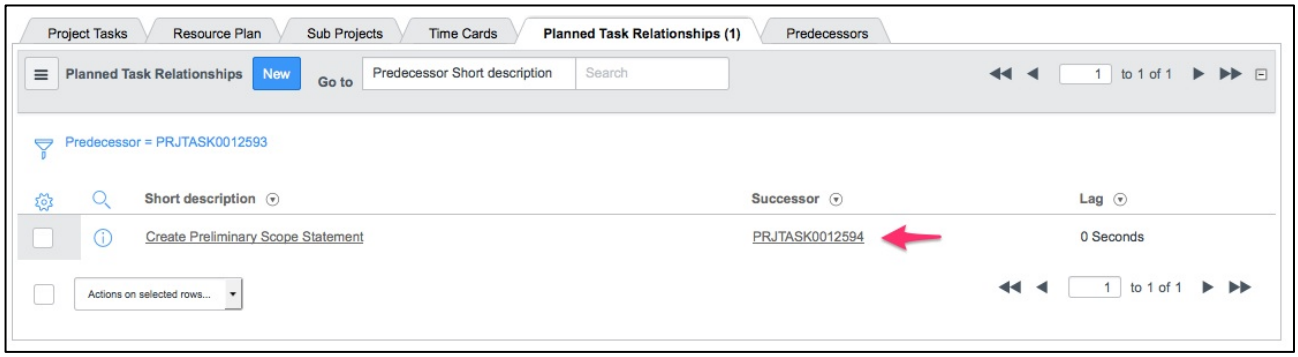


15. Right-click the header and select **Save**.

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16. Scroll down to view **Planned Task Relationships** related list.

17. Note the **Successor Task** cannot start until the current task finishes. The successor task has a dependent relationship with its predecessor task.



18. Click **Update**.

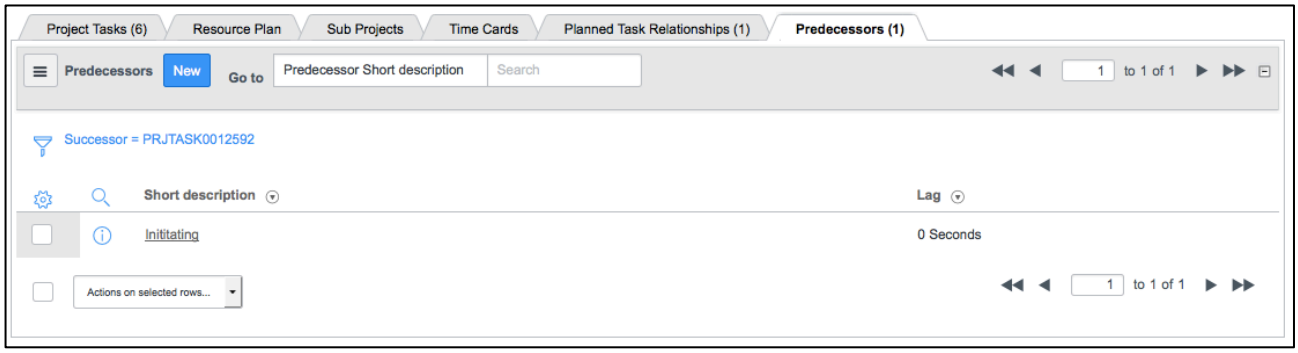
19. You are redirected back to the **Planning Task**.

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20. Note the **Planned end date** and **Planned duration** have been updated to reflect the additional days added to **Create Preliminary Scope Statement**.



21. Scroll down and click the **Predecessors** tab.



22. Note the Predecessor Task, which upon completion, is followed by another task. A predecessor task has a dependent relationship with its successor task.

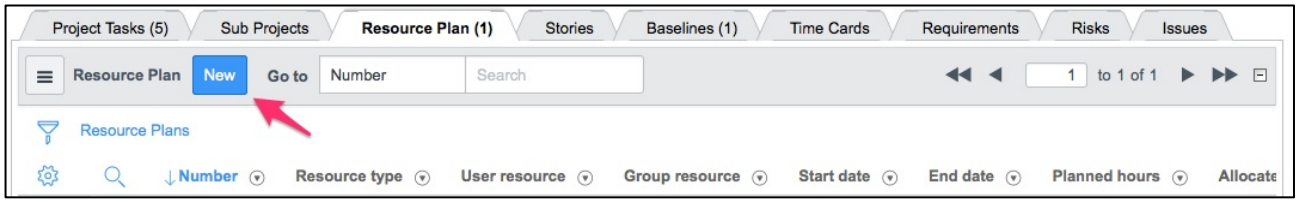
23. Click **Update**. You are redirected to the Parent Project.

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Resource Management / Resource Plans

1. Scroll down to Related Lists to view **Resource Plan** related list.

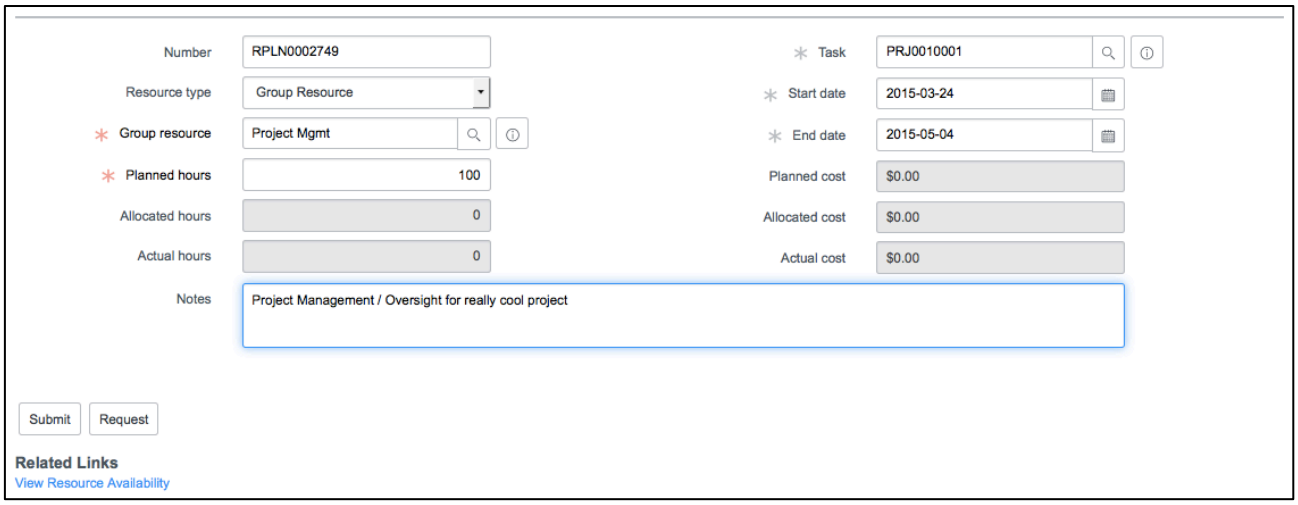
2. Click **New**.



3. Set the **Group resource** to **Project Mgmt** and update **Planned hours** to **100**.

   Note the following:

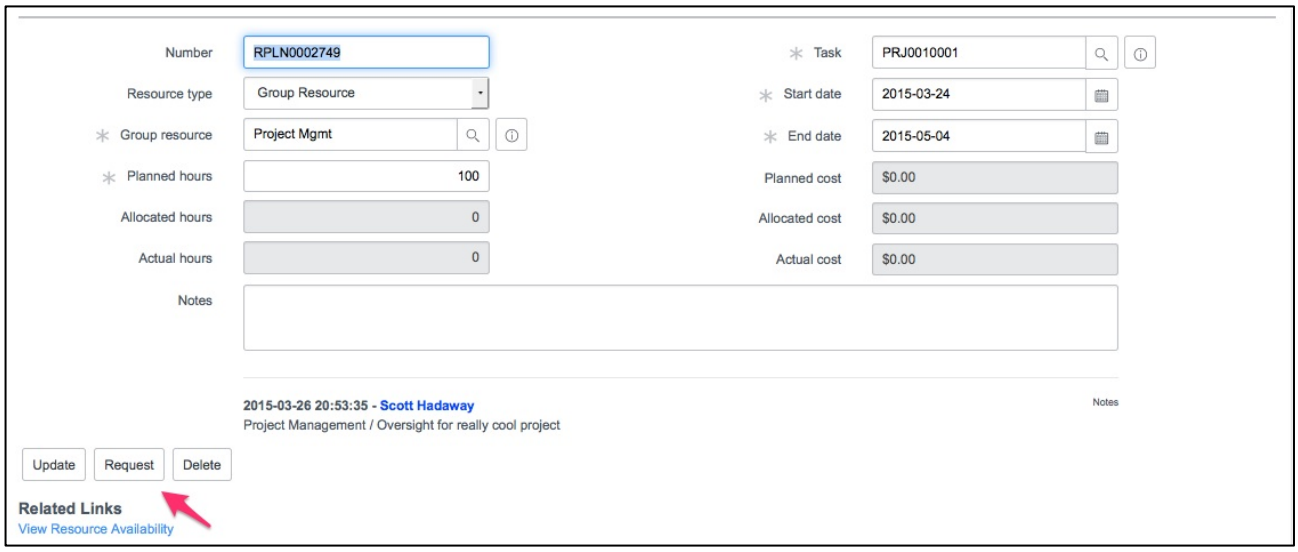
   - The **Start date** and **End date** were populated from the Project (parent) record.
   - The **Cost** fields are currently zero as they will be calculated during the next steps.



4. Normally you would **Submit** this plan and then a Resource Manager would have the responsibility to complete it. For the lab, **right-click** the header and select **Save**.

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5. Once the record has saved/refreshed, click **Request**. The record is now ready for **Resource Allocations**.

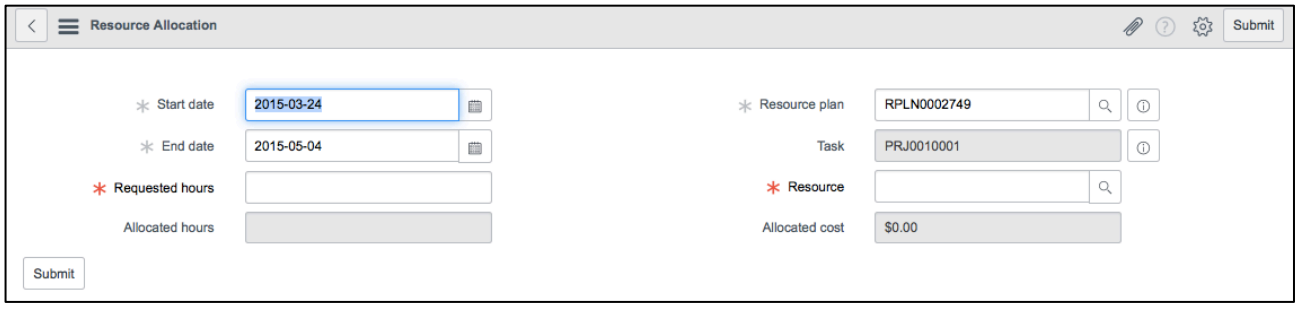


6. Scroll down to **Resource Allocation**.

7. Click **New** to create a Resource Allocation.



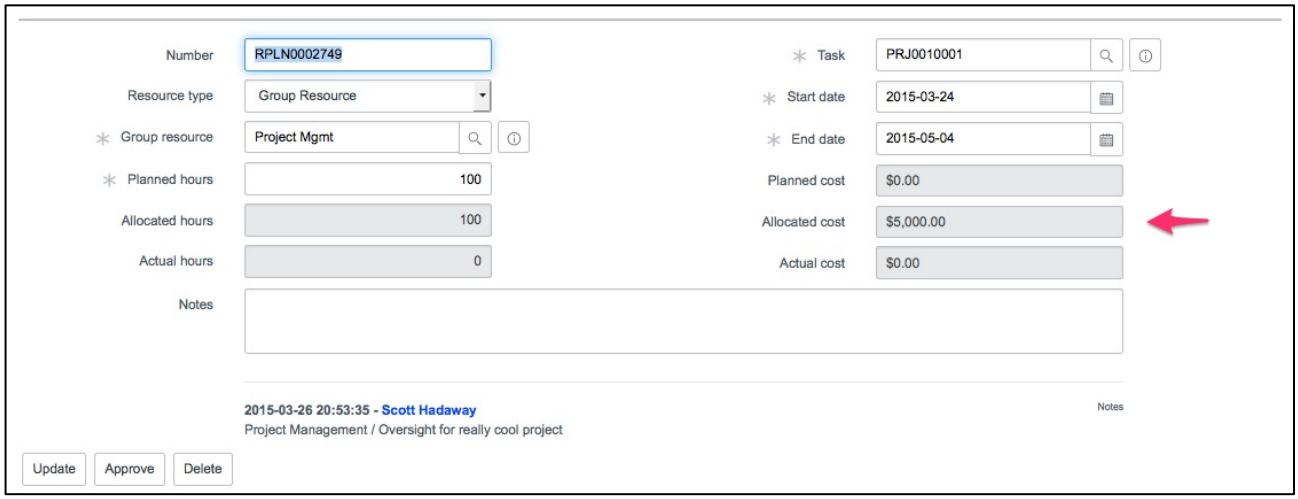
8. Add **100** hours to **Requested hours** and then set the **Resource** to **Fred Luddy**.



9. Click **Submit**. You are redirected to the **Resource Plan**.

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10. Note the **Allocated Cost** has been updated to reflect the cost of the hours allocated.



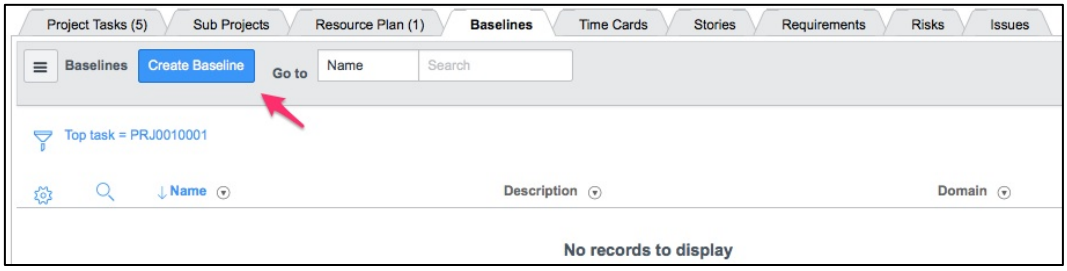
11. Click **Update** and you are redirected to your project.

Note: This is the extent of the Resource Management material that will be covered in this lab. There is a great deal of additional functionality included with the Resource Management Module. For more information please visit the ServiceNow Wiki for Resource Management here: http://wiki.servicenow.com/index.php?title=Resource_Management.

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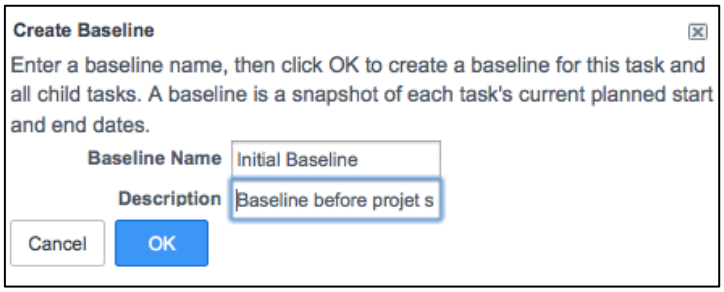
Create Baseline

1. Scroll down to Related Lists to view the **Baseline** related list.
2. Click **Create Baseline**.

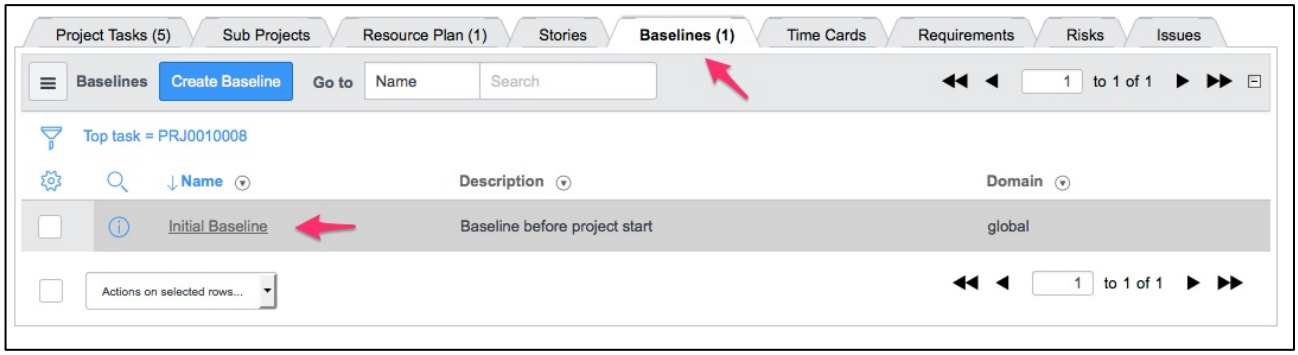


3. **Baseline Name** will default to the current date. Update the name and provide a description.

   Baseline Name: **Initial Baseline**
   Description: **Baseline before Project Start**

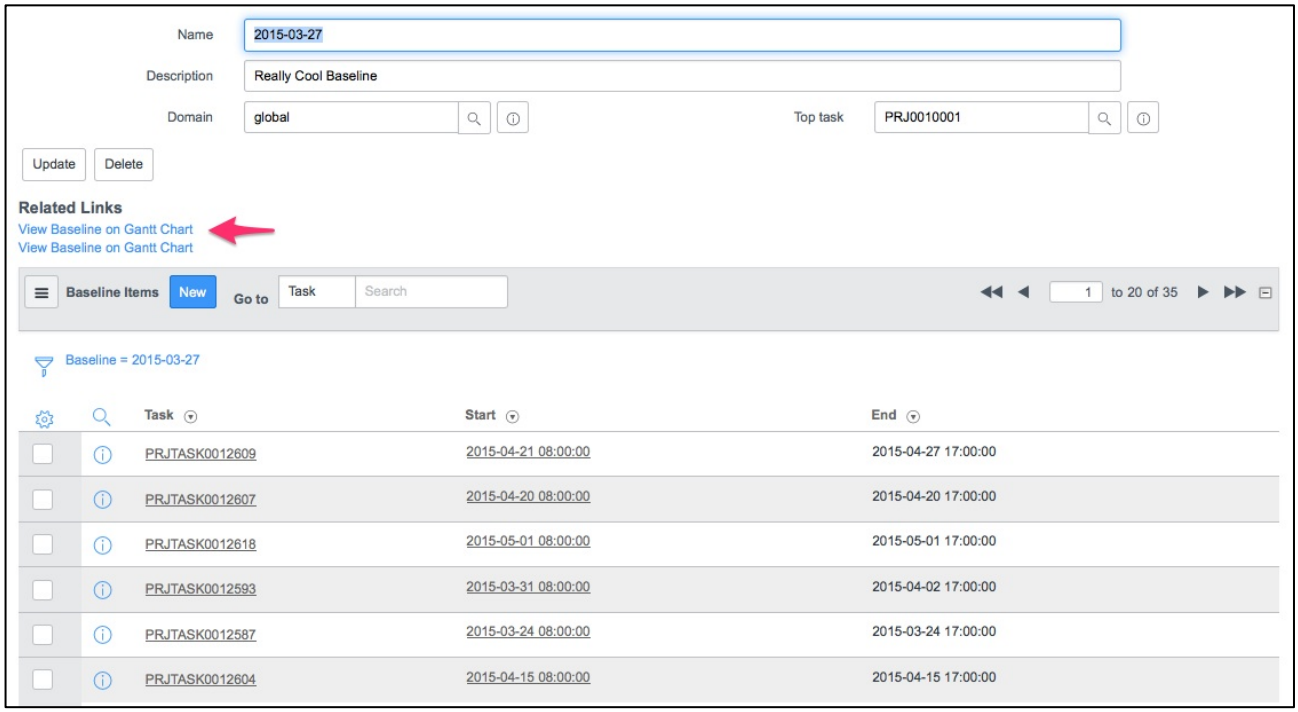


4. Click **OK.** Your Baseline is created and you are redirected back to your Project.
5. Find your newly created baseline by scrolling to related lists and clicking **Baselines**.
6. Click the **Baseline Name** to open the baseline.



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7. Click **View Baseline on Gantt Chart.** The Gantt Chart opens in a new browser tab.



Note: The actual Baseline data will not be visible at this stage as the actual start/end data has not been populated as the project has not yet started. Once that data is collected, the baseline appears as a set of black lines offset to the left or right of the bars that represent the actual tasks. The black lines represent planned dates, while the task bars represent the actual dates. Typically the project tasks are shifted to the right of the black baselines, which indicates that a project is running behind schedule.

8. **Close** the Gantt Chart tab.

9. **Update** the Baseline and you are redirected back to your project. If you are not redirected to your Project, click your browsers back button.

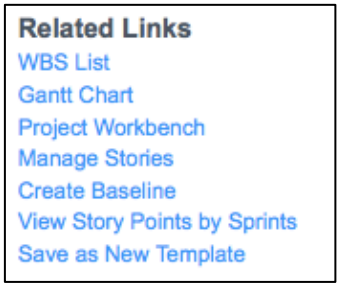
Note: At this stage you could start the project, however, we will wait to start until later in the lab.

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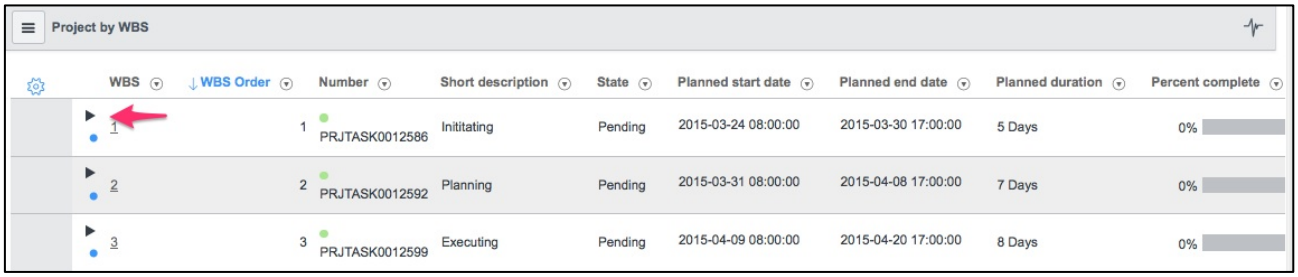
Project Related Links

1. Scroll Down towards the bottom of the Project Form and find **Related Links.**

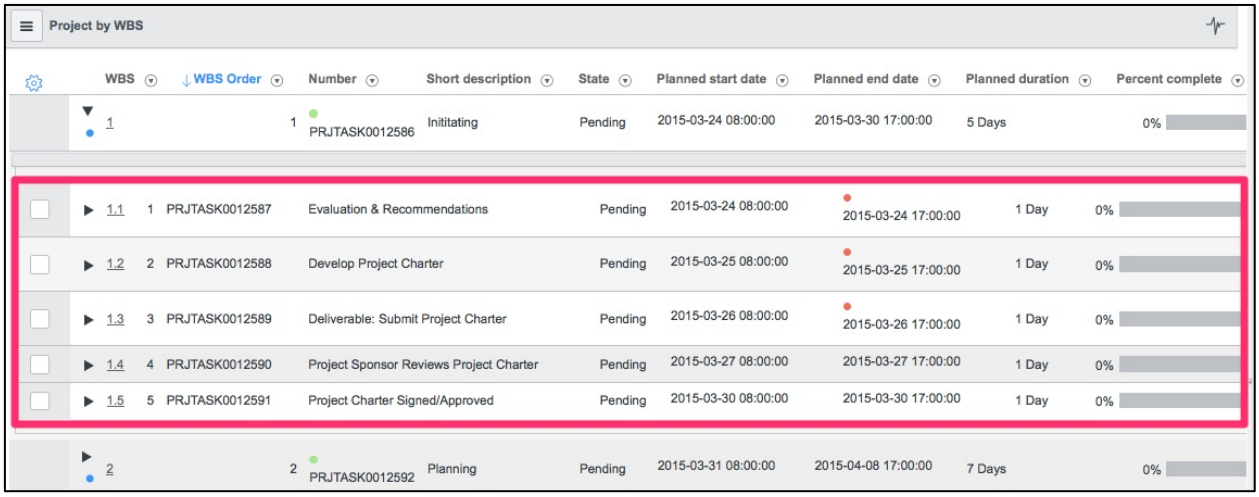
2. Click **WBS List**.



3. Click the **triangle** referenced below to expand the row.

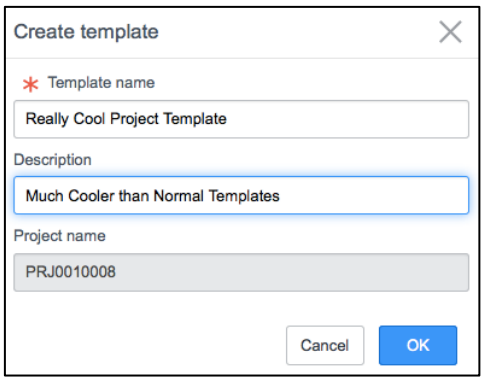


Note the Project Tasks and Sub Tasks are now displayed in WBS (Work Breakdown Structure). Also note the WBS numbers for each task in the far left column.

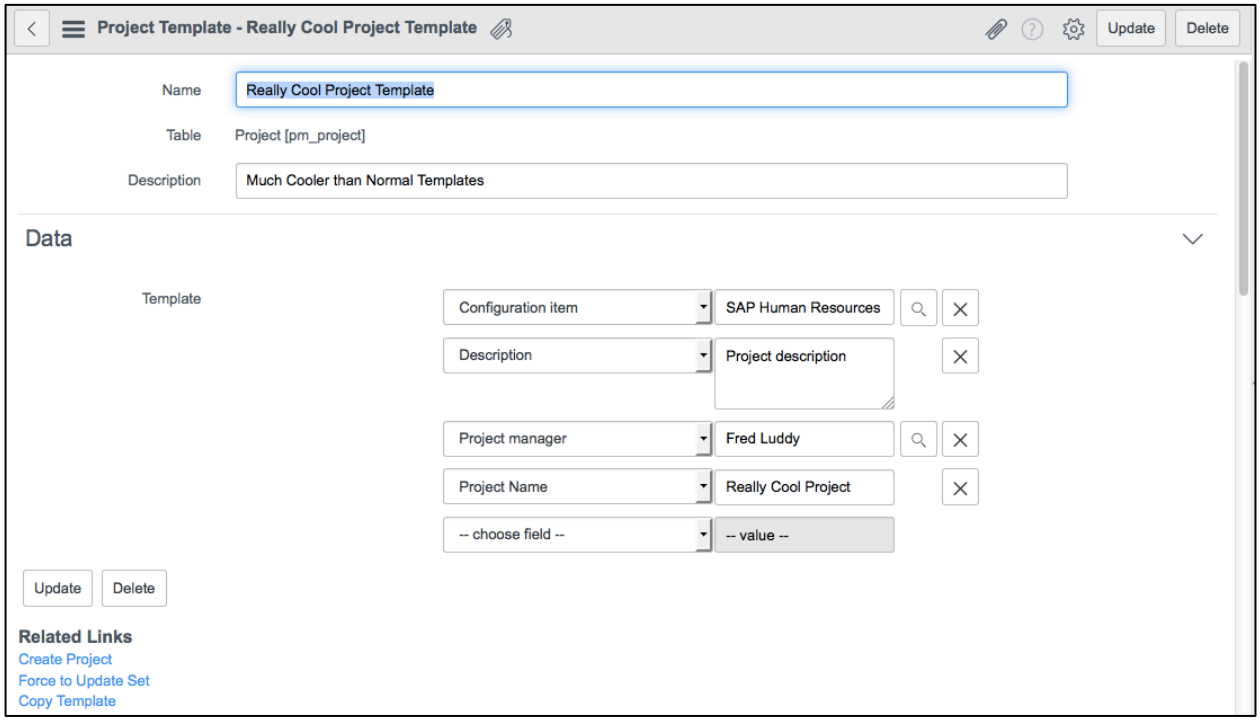


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4. Click the **browser back button** to return to your project
5. Scroll down towards the bottom of the Project Form and find **Related Links.**
6. Click **Save as New Template**.
7. Give your new Template a **Name** and **Description.**

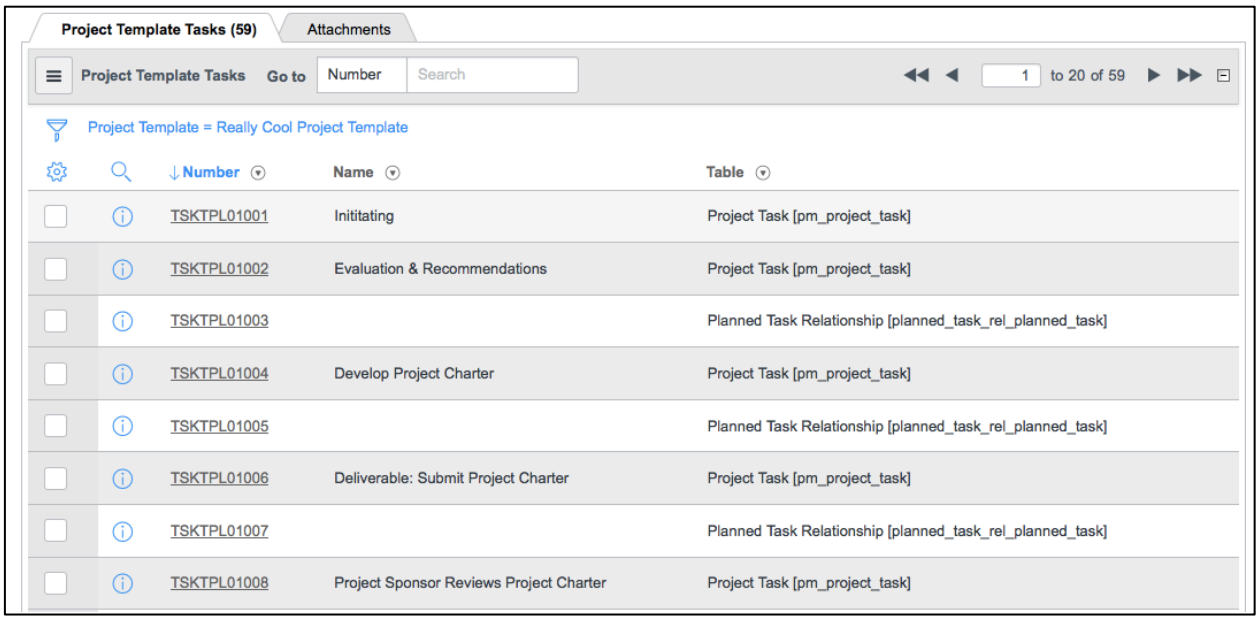


8. Click **OK.**
9. You are taken to the newly created **Project Template**.



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10. Scroll down to Related Lists and view **Project Template Tasks**.



Note: This process for creating templates is new for Fuji. Detailed information on this capability can be found in the ServiceNow Wiki Here: http://wiki.servicenow.com/index.php?title=Using_Project_Templates#Creating_a_New_Template_from_a_Project

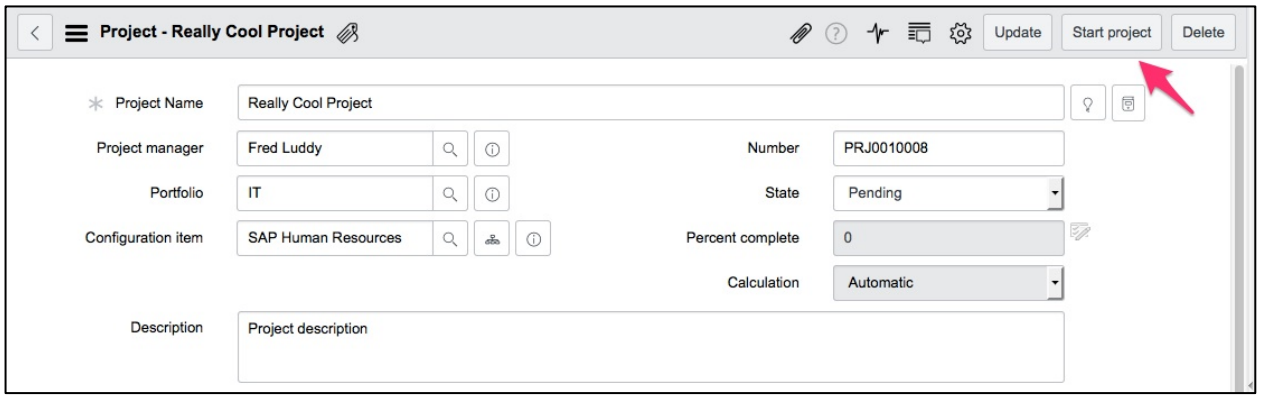
11. Click **Update.** You should be taken back to the Project. If not, navigate to your existing project.

12. From the **Related Links** section you could select **Project Workbench**, but for the lab we are going to save that for later.

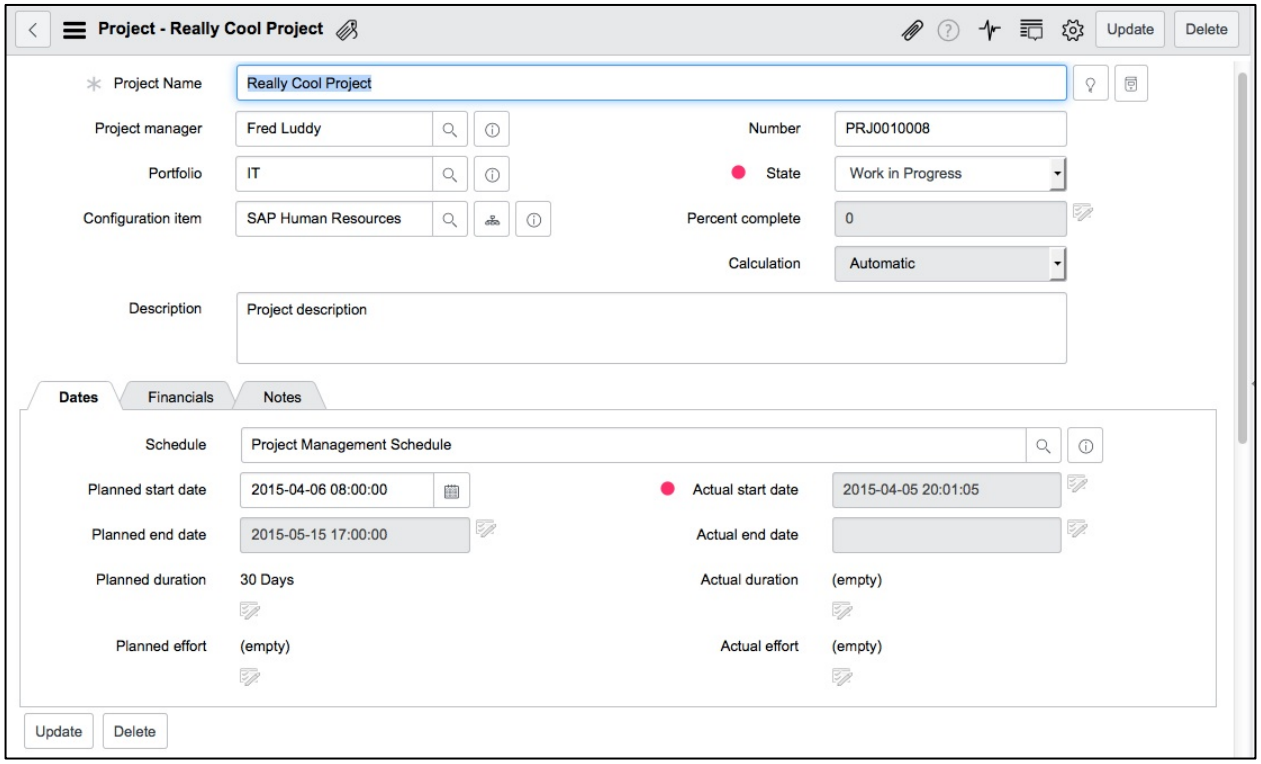
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Start Project

1. Click **Start project**.



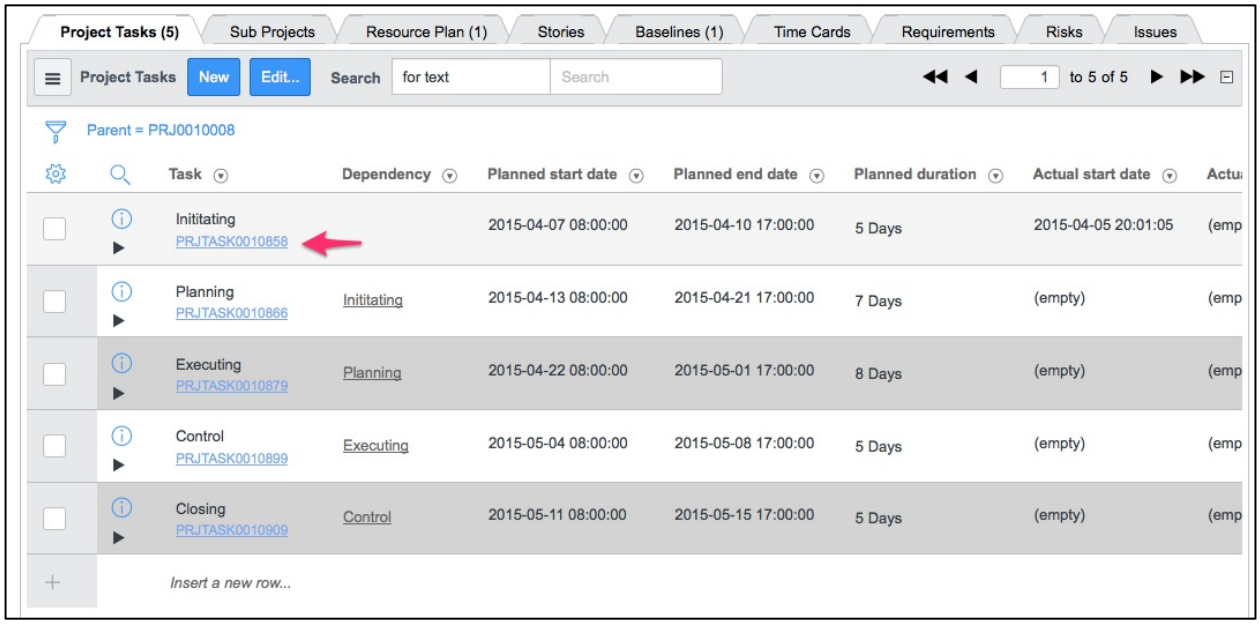
2. Note the **State** and **Actual start date** have changed.



3. Scroll Down to related Lists to view **Project Tasks** related list.

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4. Click the link to the **Initiating** task.



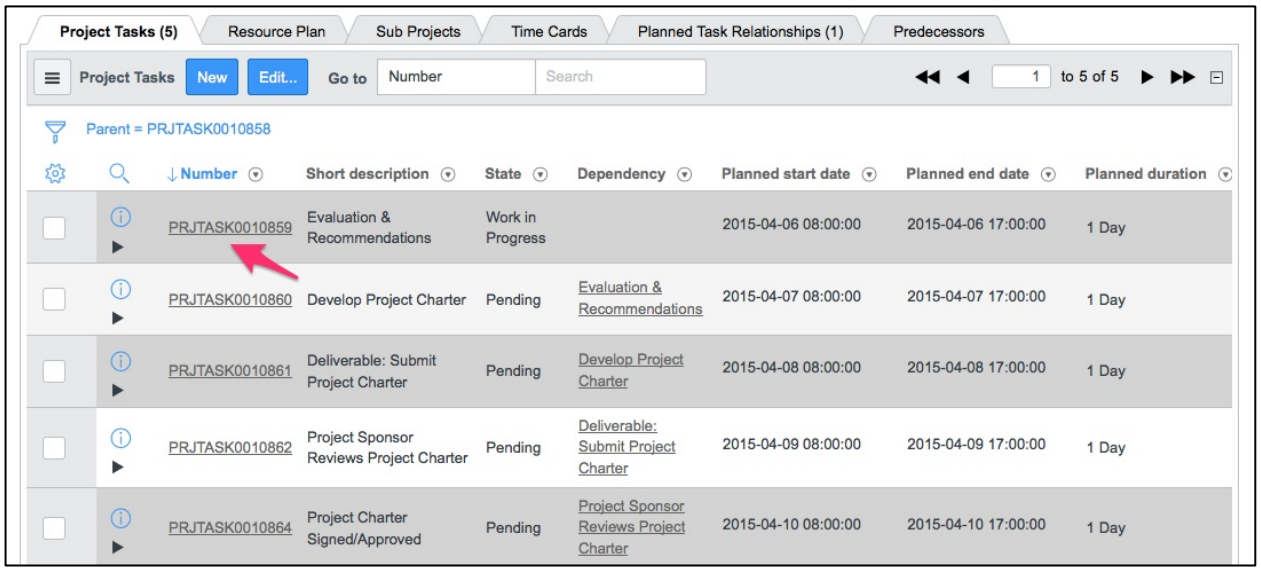
5. The Project Task named **Initiating** opens.

6. Scroll down to related Lists to view **Project Tasks** related list.

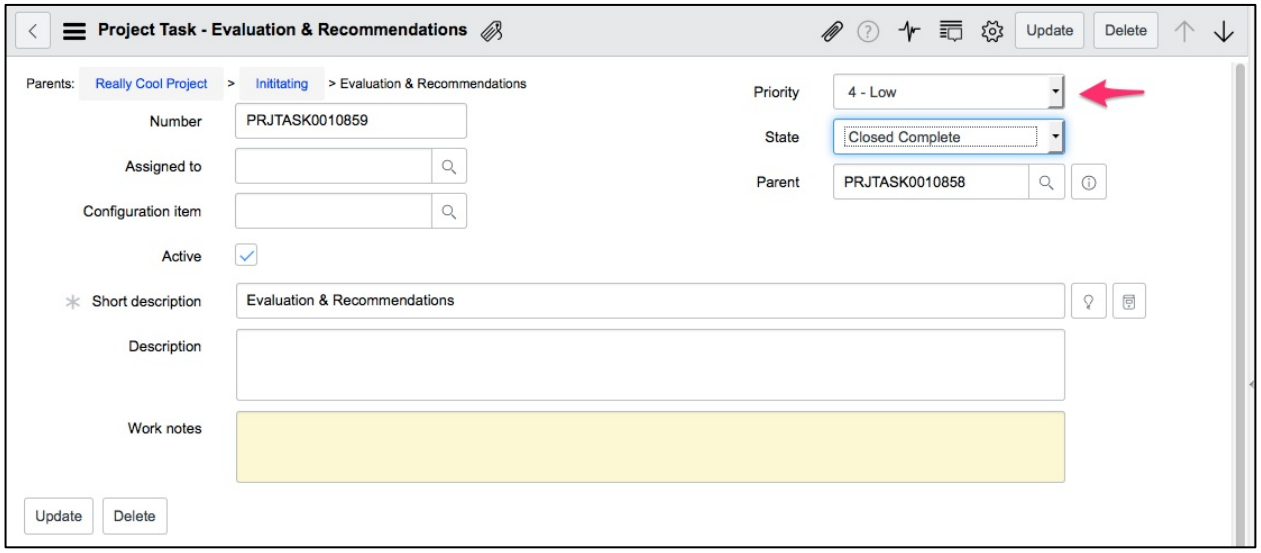
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7. Note the **State** of the **Develop Project Charter** task (should be second on the list).

8. Click the **Evaluation and Recommendations** task to open. (Should be first on the list)



9. Change the State to **Closed Complete**.

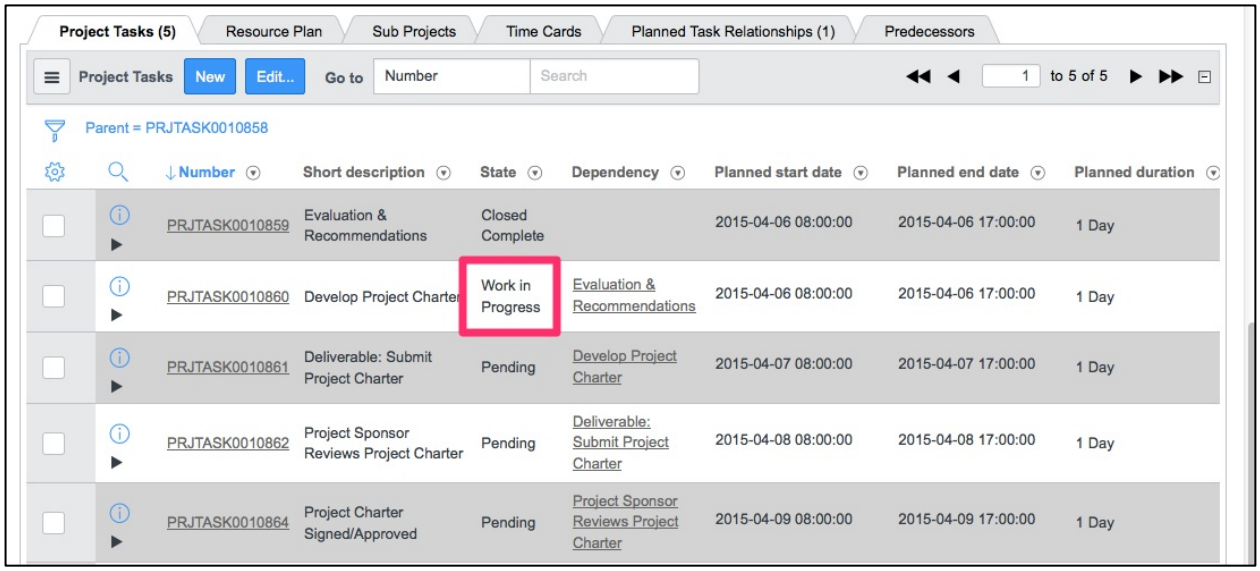


10. Click **Update.** You will be taken back to the parent **Initiating** Task.

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11. Scroll down to **Project Tasks** related list.

12. Note the **State** of **Develop Project Charter** changed from **Pending** to **Work in Progress**.

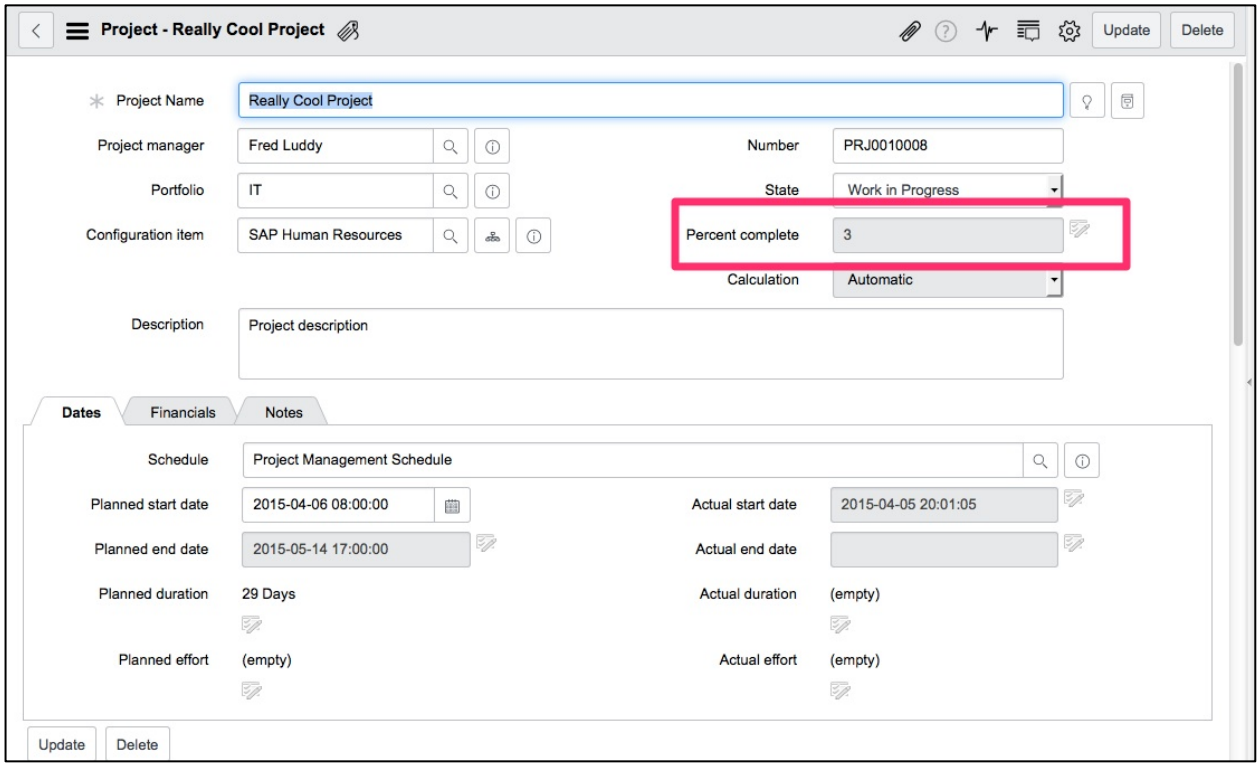


Do you know why?

13. Click **Update** to be taken back to the Project.

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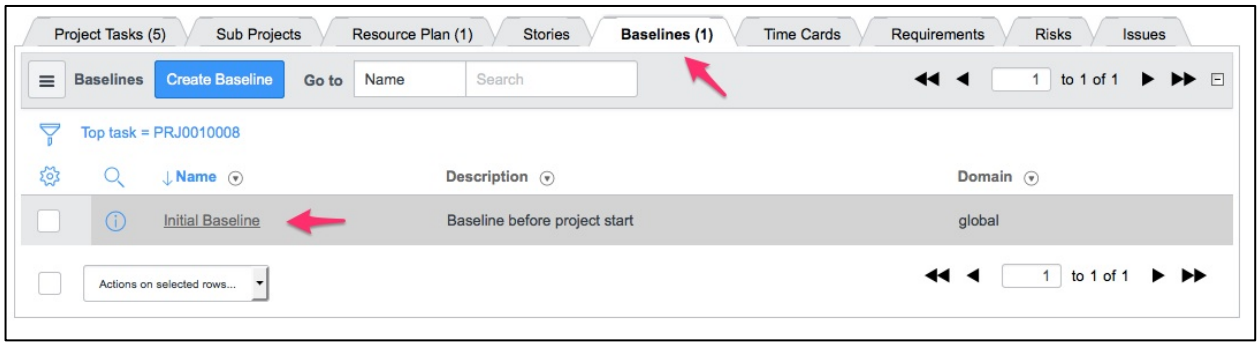
14. Note the **Percent Complete** is now showing a value, however small it may be. ☺



Review Baseline

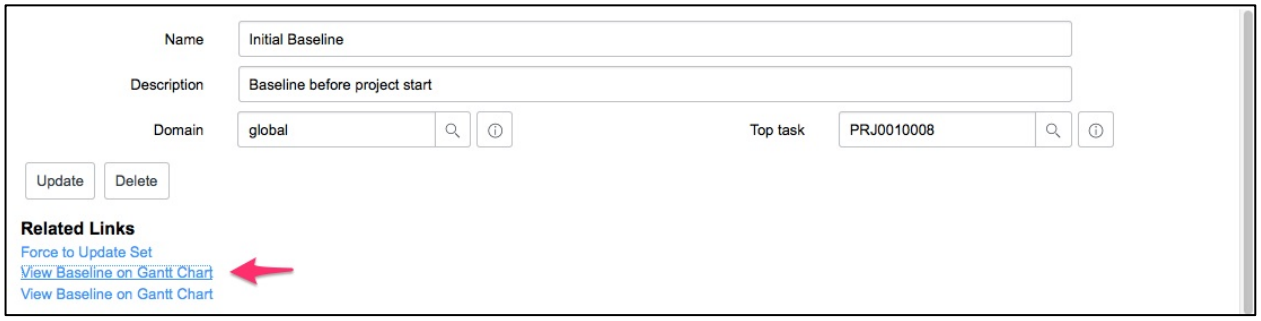
1. Scroll down to **Related Lists** and select the **Baselines** tab.

2. Click link to the **Initial Baseline** task.

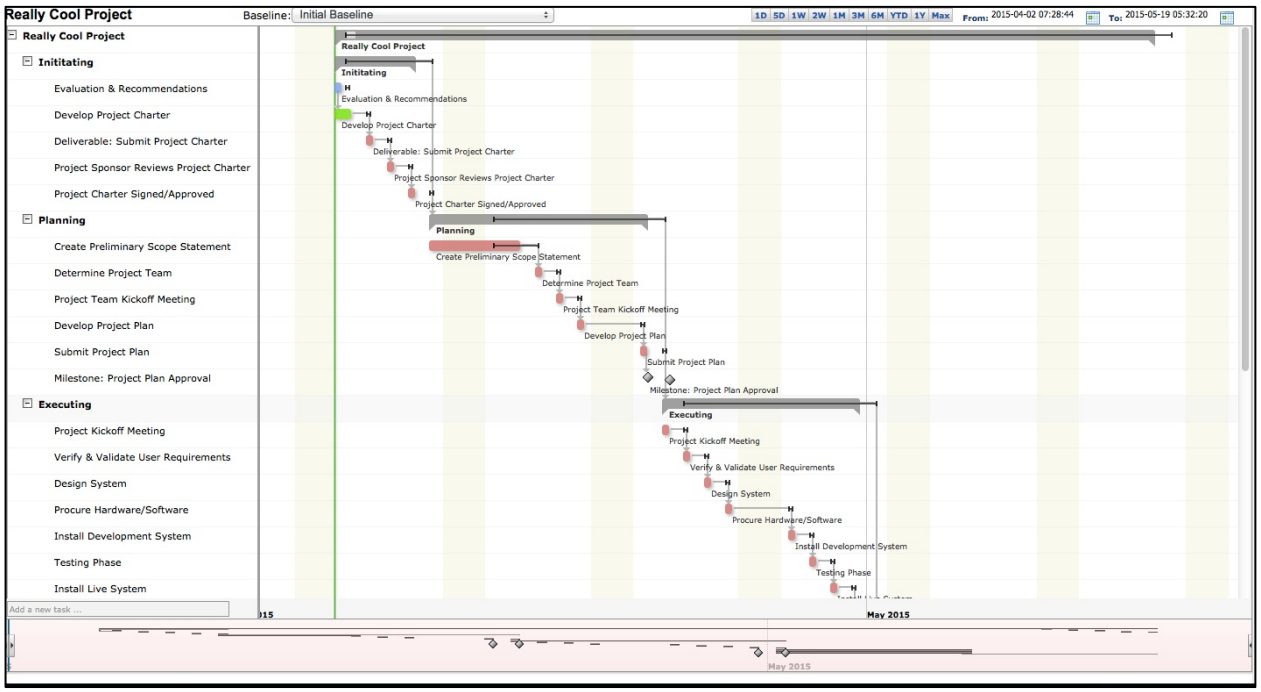


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3. Once it opens, click **View Baseline on Gantt Chart**. (either one works)



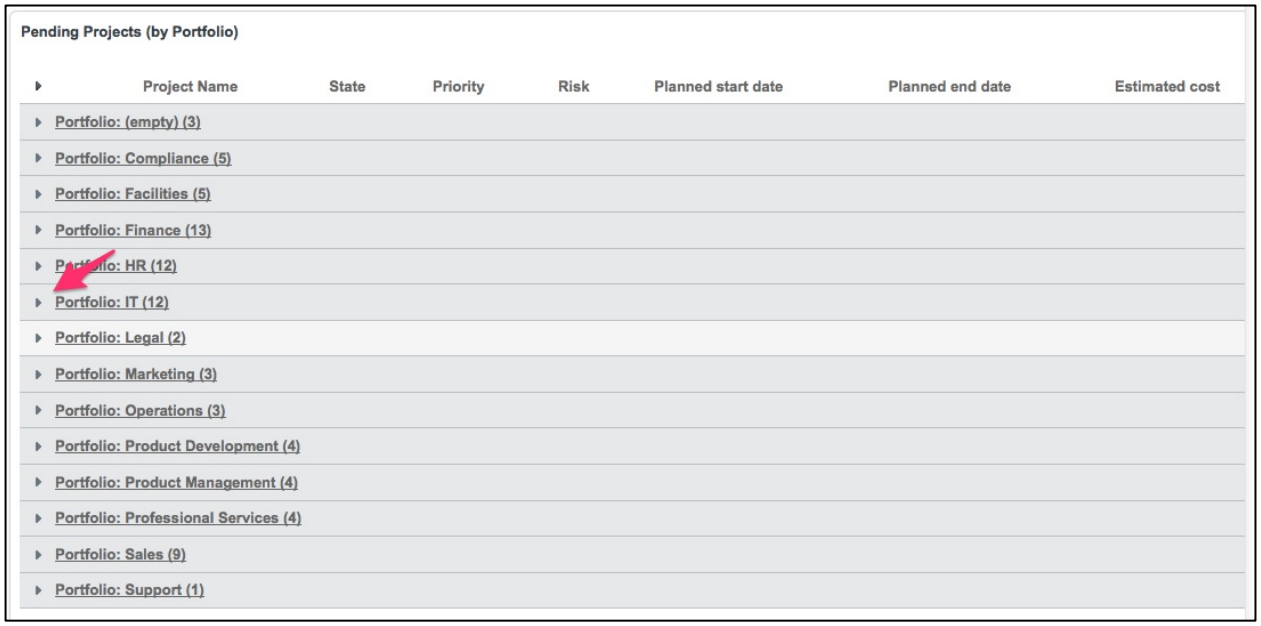
4. Notice the Black Lines above the tasks?



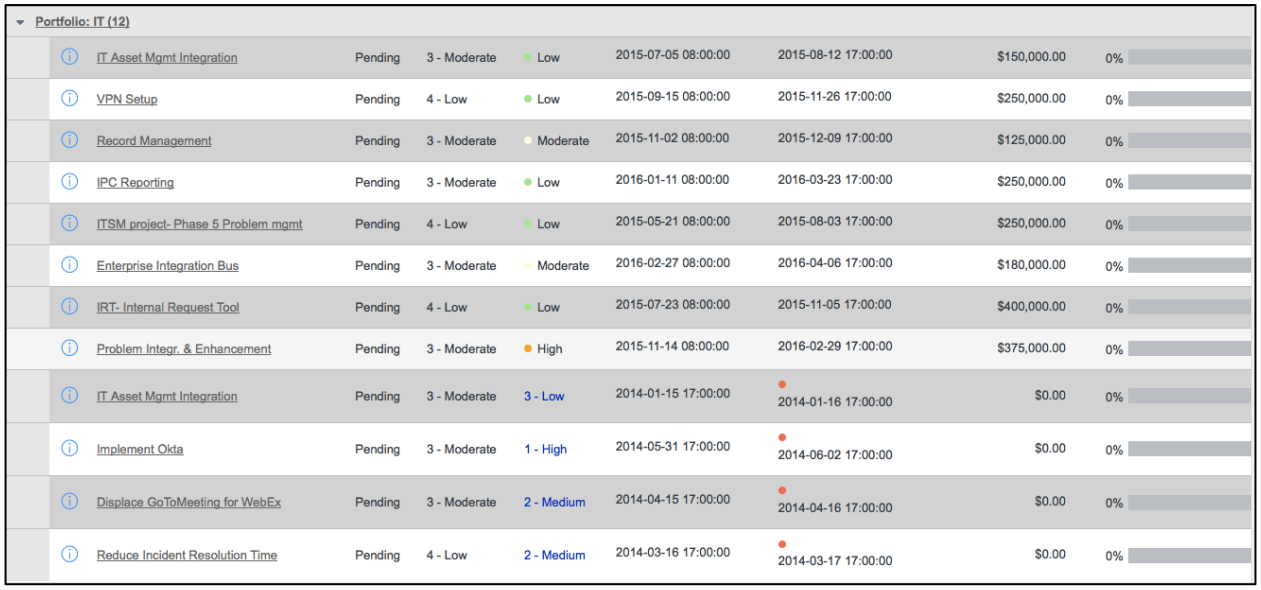
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Portfolio Overview – Extra Credit

1. Navigate to **Project > Portfolio Overview**.
2. Find and Expand the **IT** Portfolio by clicking the **triangle** just to the left of the name.



3. Find your Project – if you can. Why can't you find your project?



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Lab Goal

Become familiar with the Project Workbench and latest functionality.

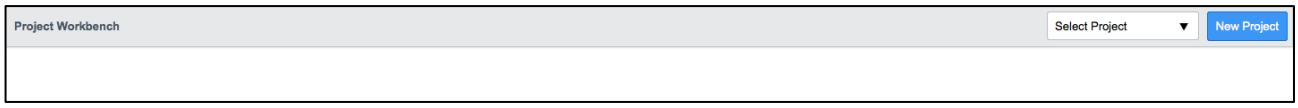
Lab 3
Project
Workbench

Project Workbench Overview

1. Navigate to **Project > Projects > Workbench**.



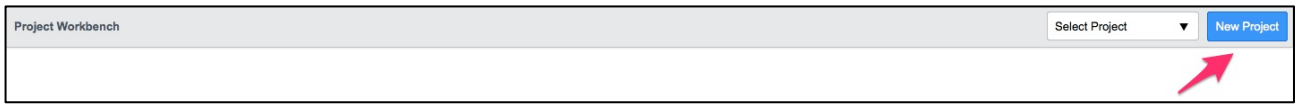
2. Right-click **Project Workbench** and select **Open in New Tab**. Your new tab should open and look like the screen below: (yes, it's going to be pretty much blank the first time you open it)



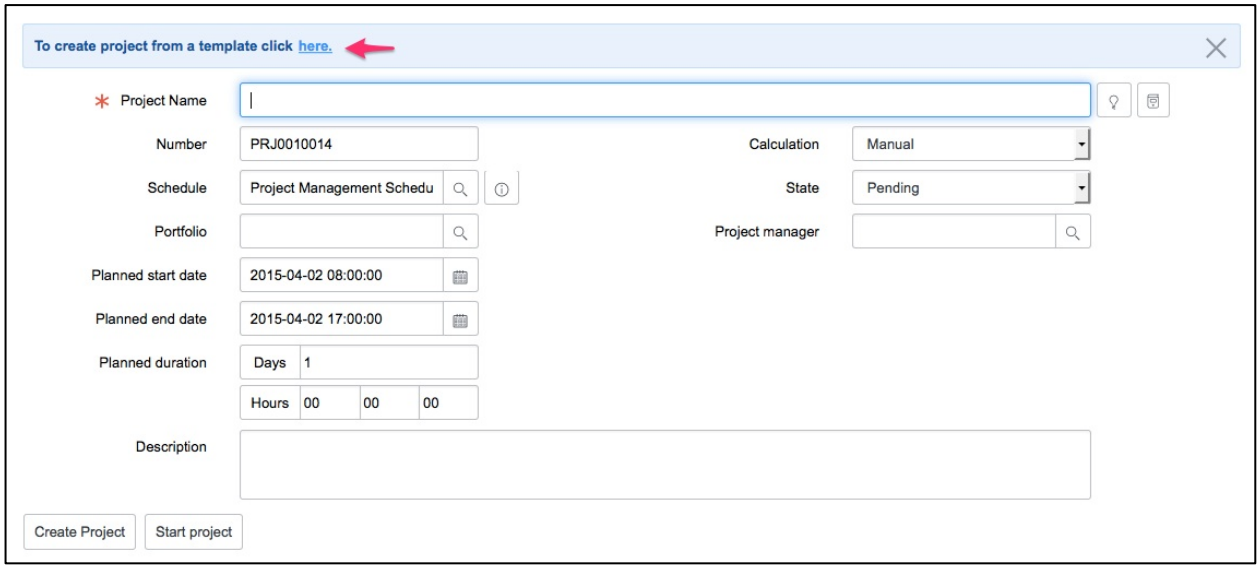
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Create a Project

1. Click **New Project** in the top right corner of the Project Workbench.



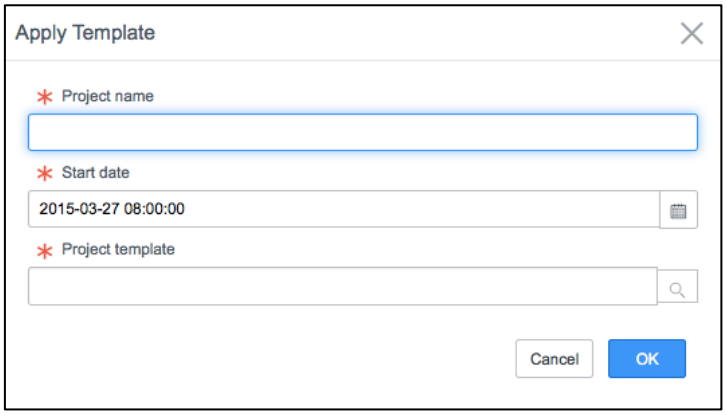
2. To create project from a template click **here**. The arrow points to the link in the image. You will be presented with the following pop-up. (*Yes, we've been here before* ☺)



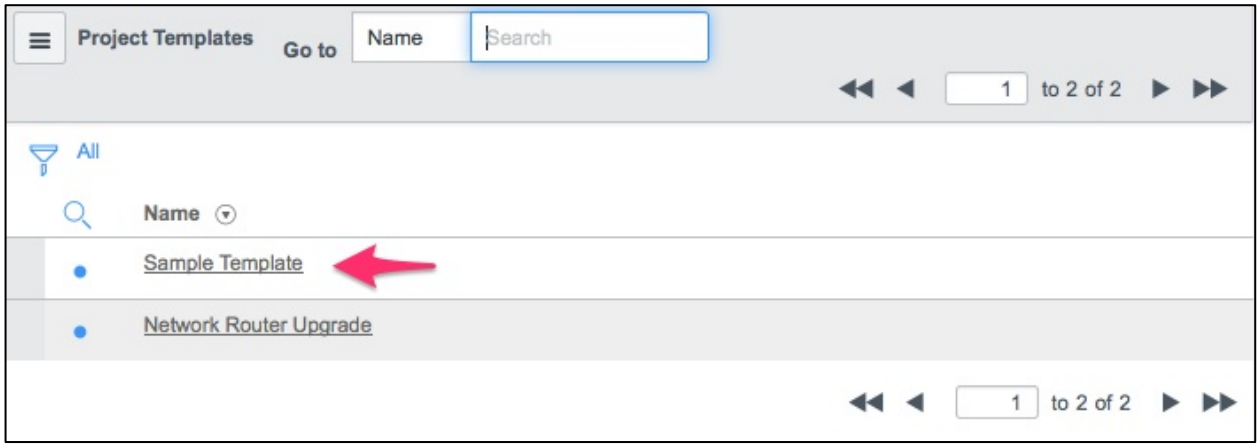
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3. Provide a **Project name. (***Preferably a new and exciting Project Name*)

   Start date can be left to default date.



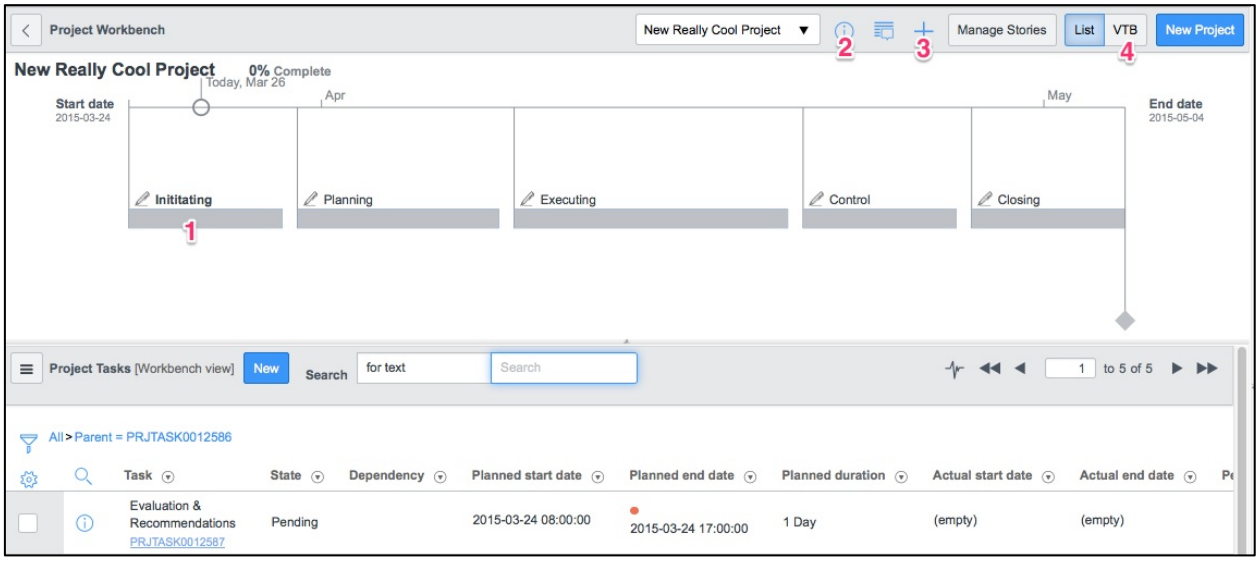
4. Type or search for **Sample Template** for the Project Template.



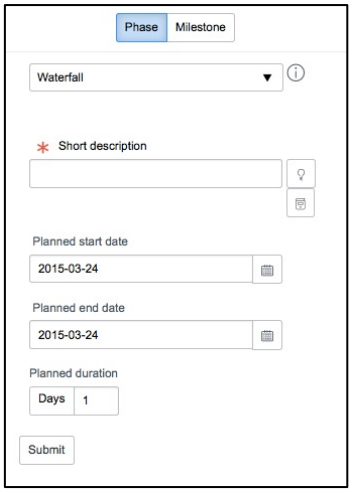
5. Once you've selected the template, click **OK.**

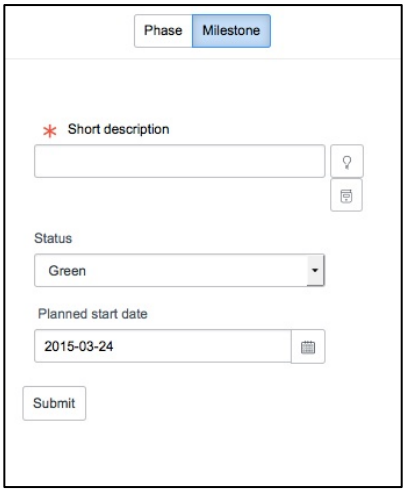
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6. This time you are directed to the **Project Workbench**.



7. Select the **Initiating Phase** bar denoted with the number **1** above. Notice that it filters the tasks in the bottom pane of the workbench.
8. Select the **Info** icon denoted with the number **2** above. This opens the Project Information form in a pop up. (Note: If you open the popup, close it before continuing.)
9. Select the **+ Sign** denoted with the number **3** above. This allows you to create a new **Phase** or **Milestone**.





Note: The Phase or Milestone will land on the timeline based on **Planned start date** you provide.

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Collaboration

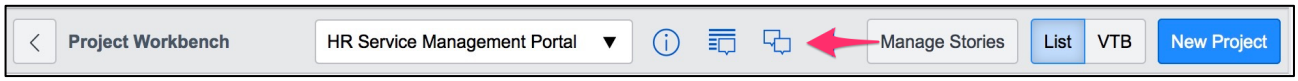
The collaboration feature provides a chat interface optimized to facilitate collaborative work on tasks. Collaboration integrates seamlessly with other social IT and task management features within the ServiceNow system, such as visual task boards. The collaboration interface overlays the standard interface, which allows users to participate in conversations while they work. Features include:

- Individual conversations between users
- Group conversations with multiple users
- Conversations linked to records. Comments and work notes appear in conversations in real time and users can update the record directly from the conversation.
- Drag-and-drop sharing of links, files, and ServiceNow records.

Collaboration is available starting with the Fuji release when UI15 is enabled.

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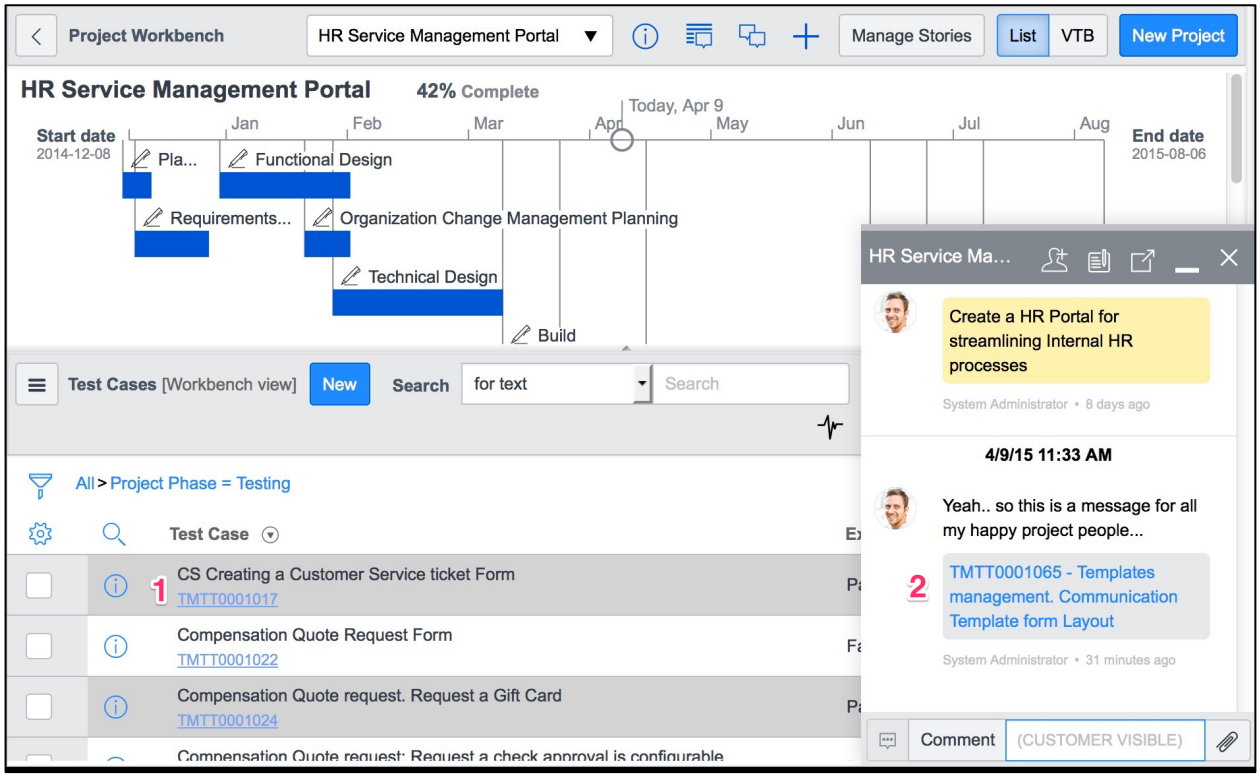
1. Click **Show in Collaboration** icon.



2. Click the **Arrow** to open the Collaboration Pane. 

3. Click the **Conversation** to open the Conversation. 

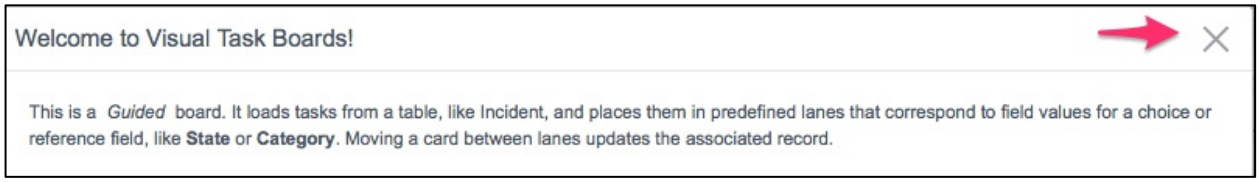
4. Click and hold task (denoted with a **1**) to the conversation (denoted with a **2**).



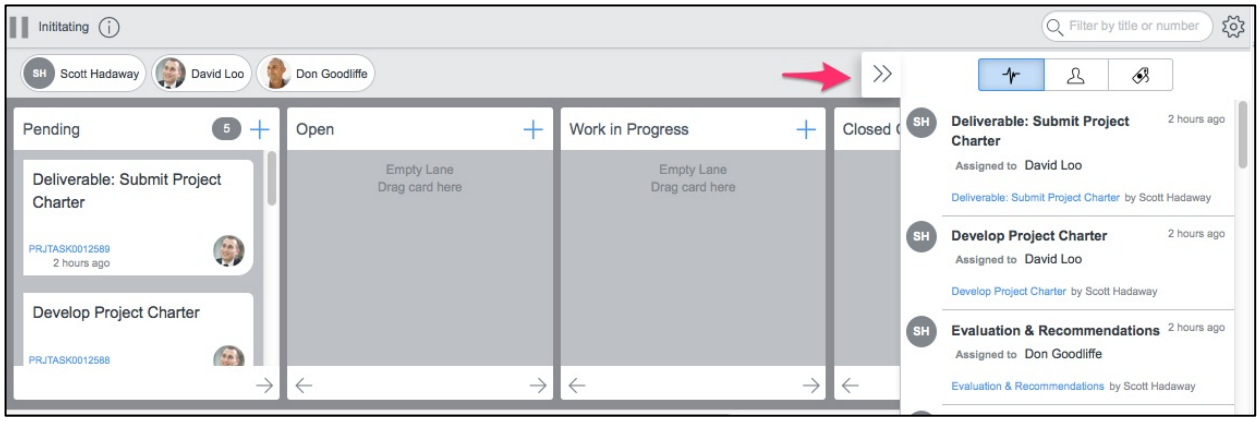
5. Select the **VTB Button** in the upper-right corner and as denoted with the number 4 on page 59. This opens the Visual Task Board view in the bottom pane vs. the list view.

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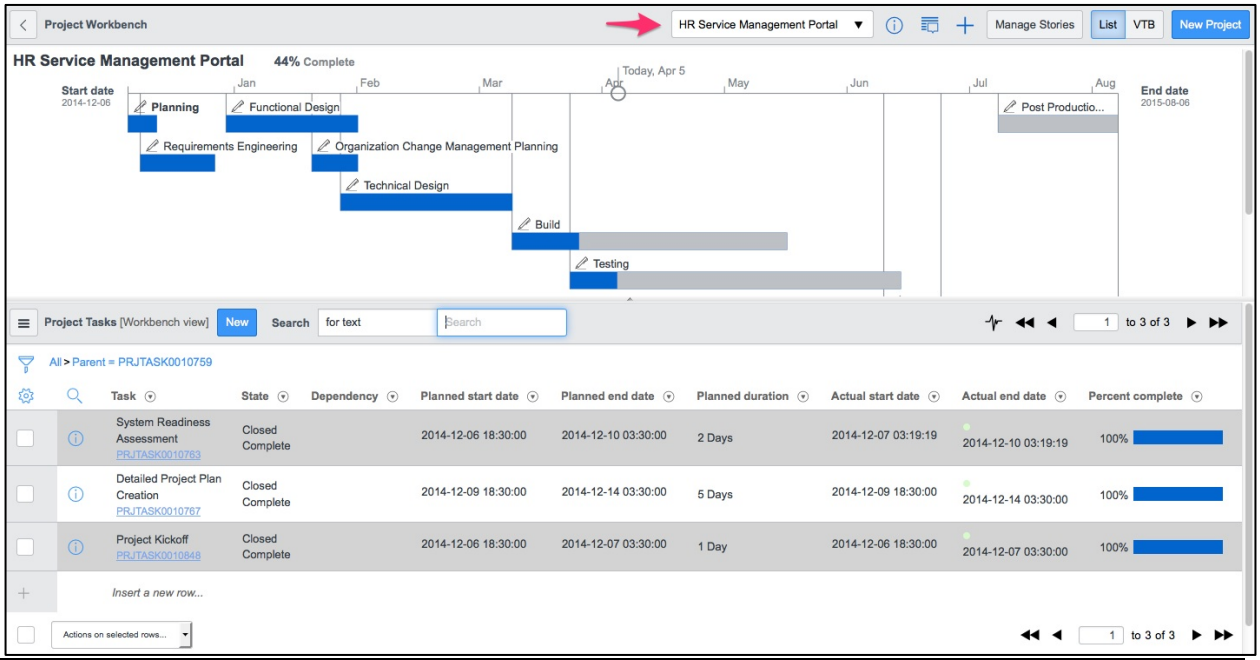
6. The first time you open the VTB view you see the Welcome Screen. Click the **X** to close it.



7. By default the VTB will open with the Activity Stream showing, again, simply click the **>>** highlighted to close it.



8. Switch back to the list view and choose **HR Service Management Portal** in the **Project Filter**.



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Lab Goal

Become familiar with the Software Development Lifecycle functionality including SCRUM, Agile and Team Collaboration.

Lab 4
SDLC
Overview

Software Development Lifecycle Overview

The SDLC integration with Project Portfolio Suite provides a solution for IT application development by integrating the SDLC application with project-based IT development. IT organizations typically work on multiple projects with shorter time schedules. The project planning and tracking is done using Waterfall but the development team prefers Agile or Scrum methodologies to carry out their work. It then becomes a challenge to track project status when there is an Agile development phase. This integration facilitates a combination of Waterfall and Agile methods for project management and development. The SDLC process is integrated with Project Portfolio Suite, starting with the Fuji Release.

The SDLC integration with Project Portfolio Suite provides the following process flow:

1. Create a team, add team members, and set team capacity
2. Create sprints
3. Assign teams to projects from the Project Workbench
4. Maintain team and project backlogs
5. Perform team sprint planning
6. Create stories, including one-off stories that are not related to projects
7. Track progress in stories, phases, and projects

Multiple projects can be under development and teams can be assigned to multiple projects. Each project and each team has its own backlog. The project backlog includes all stories related to a project. The team backlog includes stories from multiple projects that have been assigned to the team. The team grooms this combined backlog, ranks the stories and assigns points, and adds stories to sprints based on priority.

To use the SDLC integration with Project Portfolio Suite, activate the Project Portfolio Suite plugin.

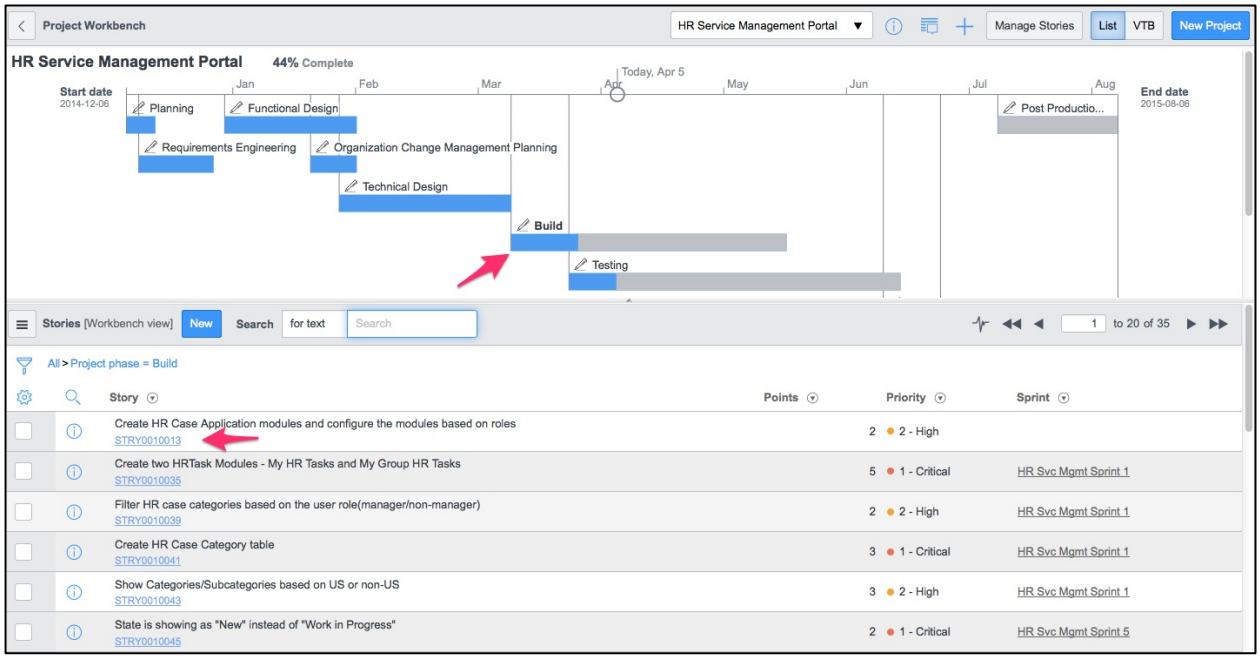
Note: There is a Lab Specific to SDLC so we will be covering the basics only during this lab.

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Stories

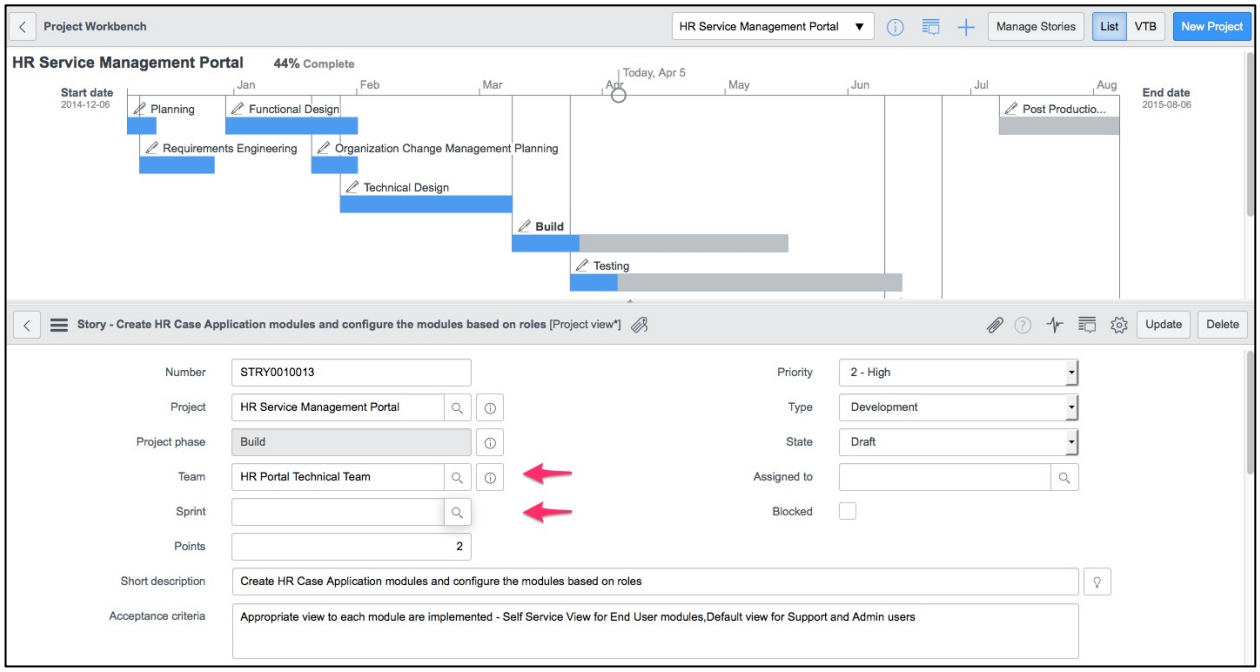
1. Review **Story Task** related to **HR Service Management Portal.**

2. Click the **Build Phase** and notice the filter list pane updates.



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3. Click the **Story Number** to open the first story.



4. Note that the **Story** Opened in the lower pane. You can work with the story in this view or hold the **Control Key** (or **Command Key** for Macs) to open the Story in the new window.

5. The **Team** has already been populated, if it hasn't select **HR Portal Technical Team.**

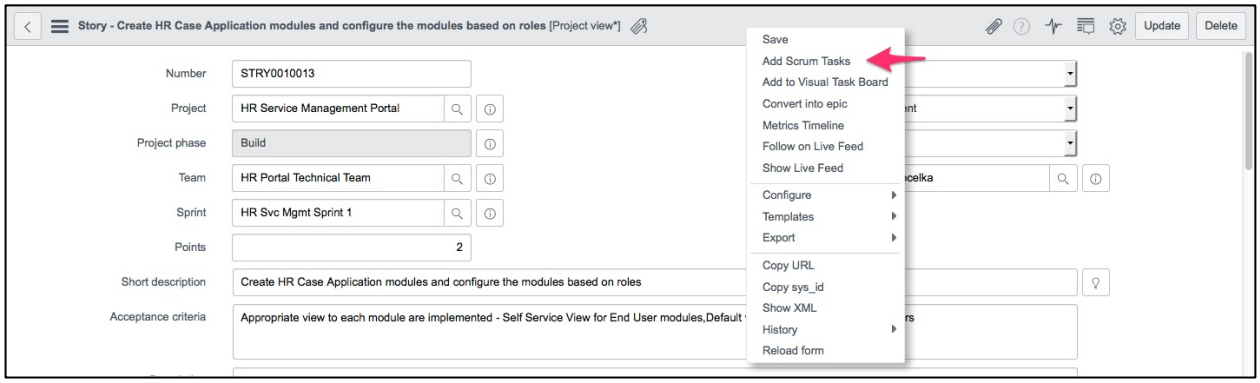
6. You can also add this Story to a **Sprint.** Select **HR Svc Mgmt Sprint 1**.

7. Assign this story to **Francine Vocelka**.

8. Right-click the header and choose **Save.**

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9. Right-click the header and select **Add Scrum Tasks.**



10. For each field **Analysis**, **Coding**, **Documentation**, and **Testing**, set the value to **1**.

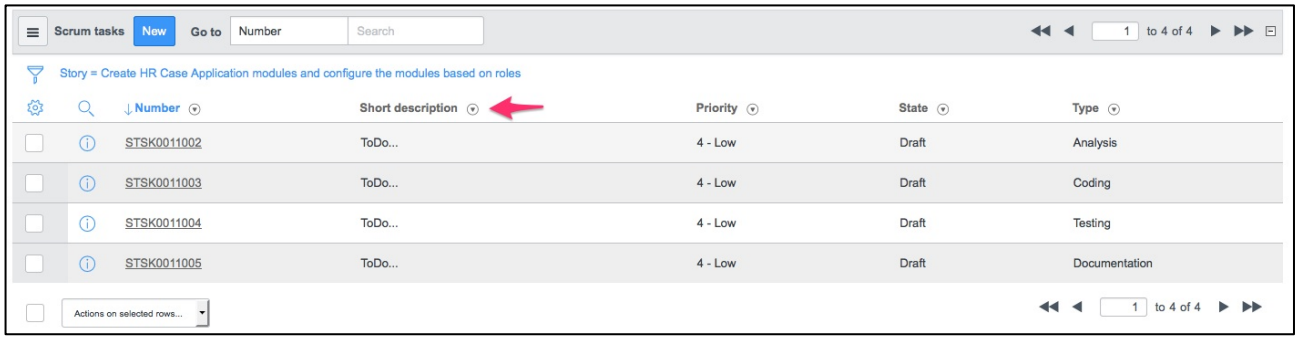


11. Click **OK.**

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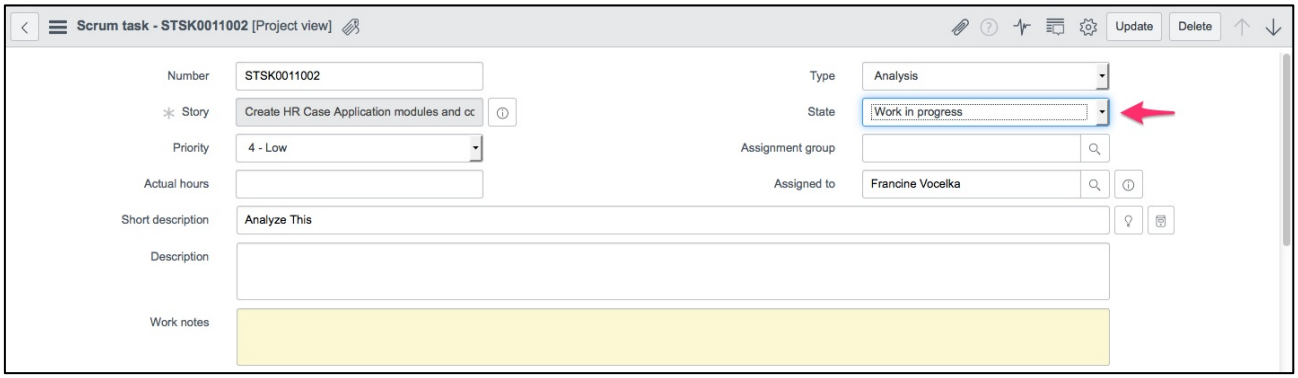
12. Scroll down to **Scrum Tasks** related list.

13. Double click the **Short description** for each task and provide something hilariously funny.



14. Open the first Task.

15. Set the State to **Work in Progress**.



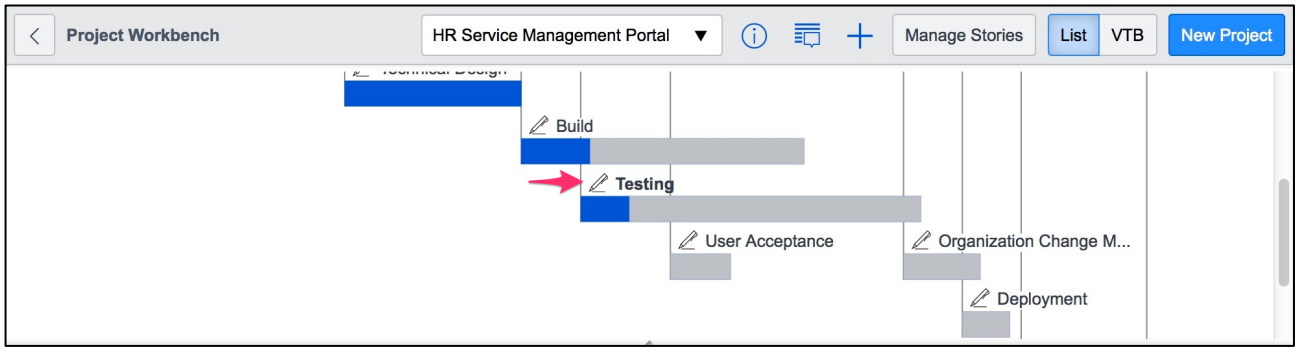
16. Click **Update.** You return to the **Story.**

17. Click **Update** again.

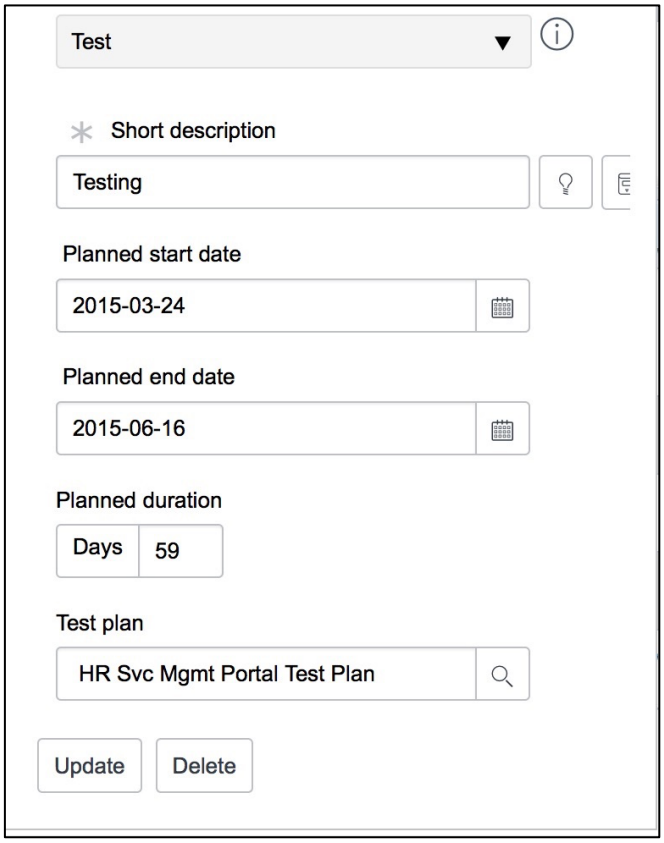
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Test Phases

1. On the **Project Workbench** Scroll and find the **Testing Phase,** click the **Pencil** as denoted below.



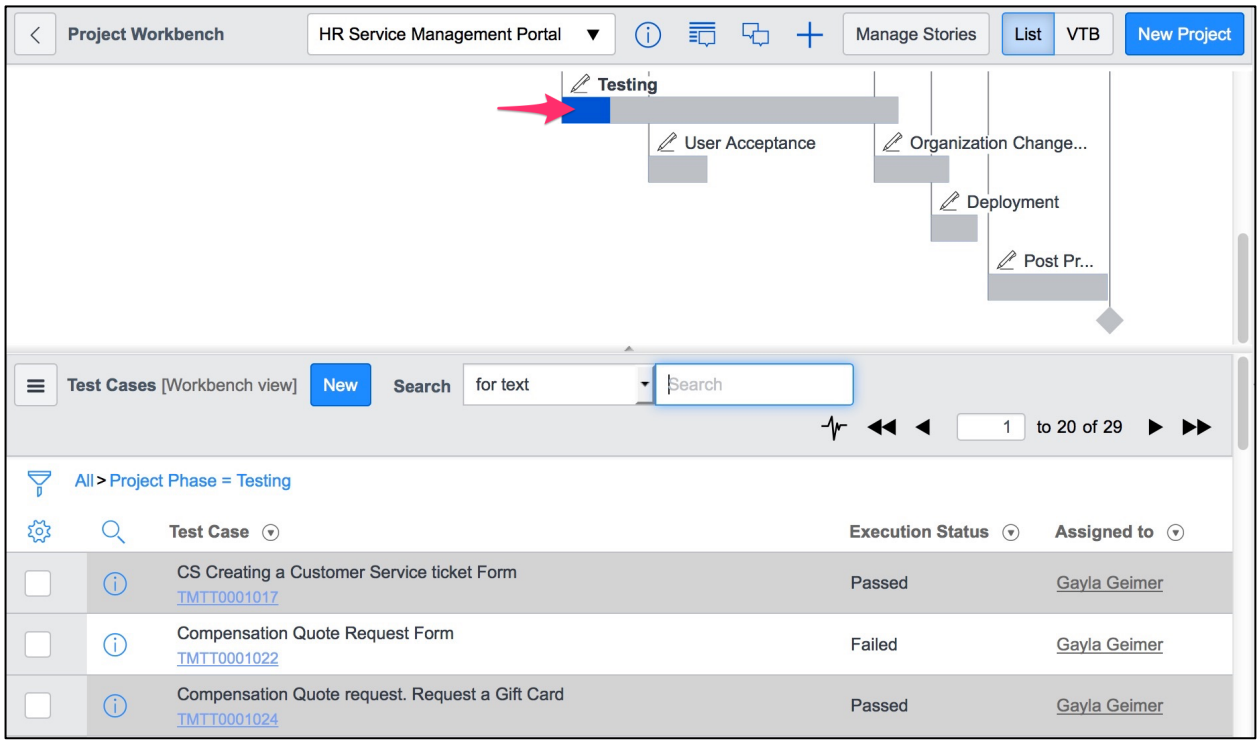
2. The Testing Plan opens and displays.



3. We aren't going to make any changes at this point so simply click **Update.**

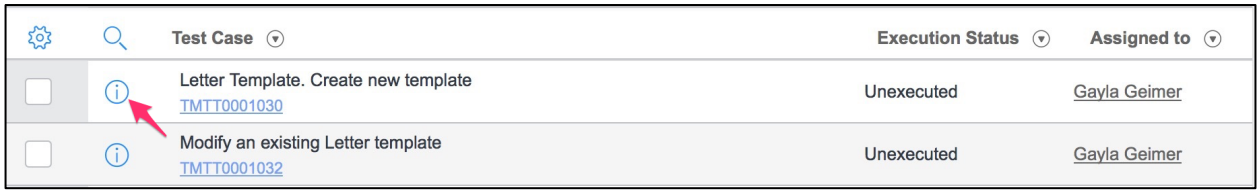
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4. In the top pane click the **Testing Phase**, which will update the lower pane to show all testing tasks.



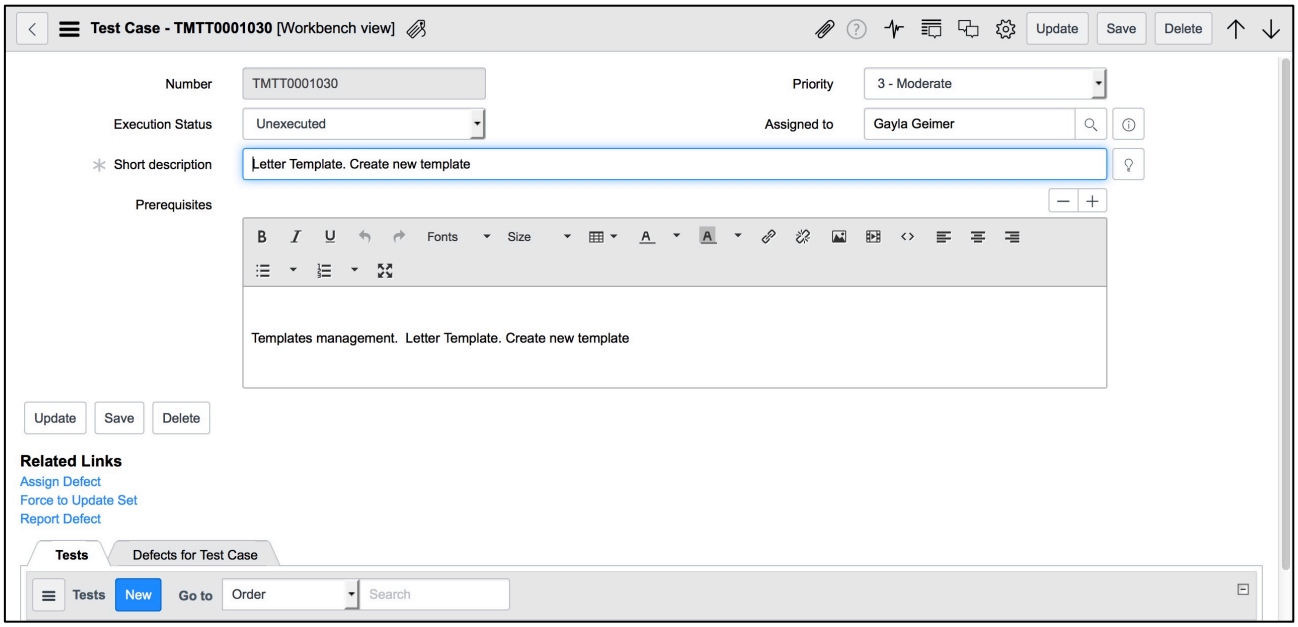
5. Scroll through the testing tasks to find task named **Letter Template. Create new template**.

6. While holding your **Command** or **Control** key**,** click the **Info Icon**. This opens the testing task in a new tab.

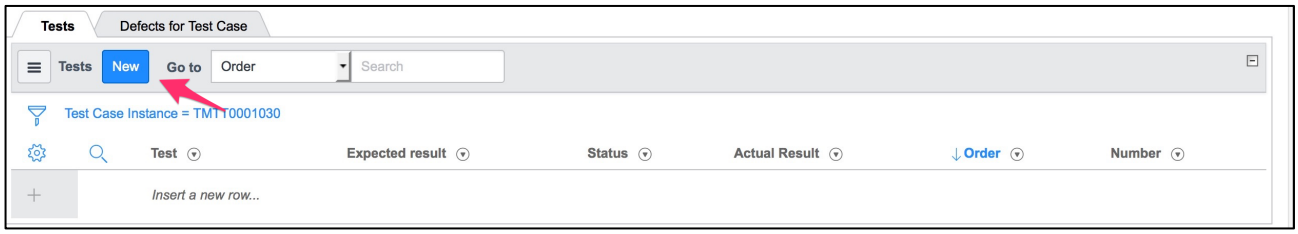


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7. Review the details of the test case.

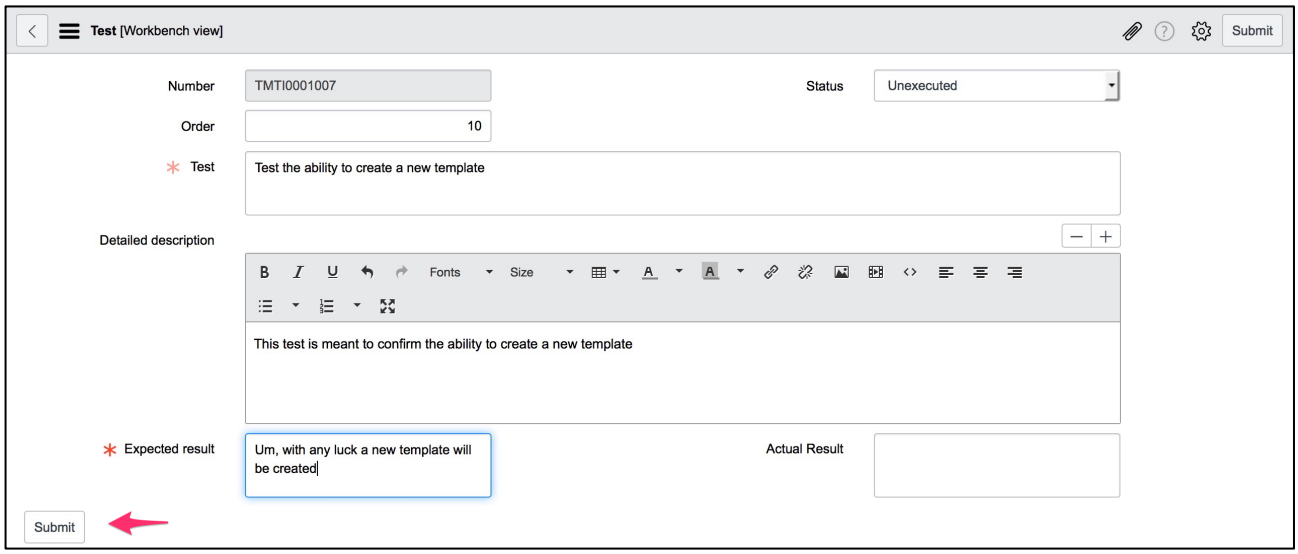


8. Scroll down to **Related Lists** and find the **Tests** tab. Click **New.**



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9. Populate the required fields **Test** and **Expected Result.** You can also provide a detailed description. Then click **Submit.**



10. You are returned to the **Test Case.** Click **Update** and **Close** the browser tab.

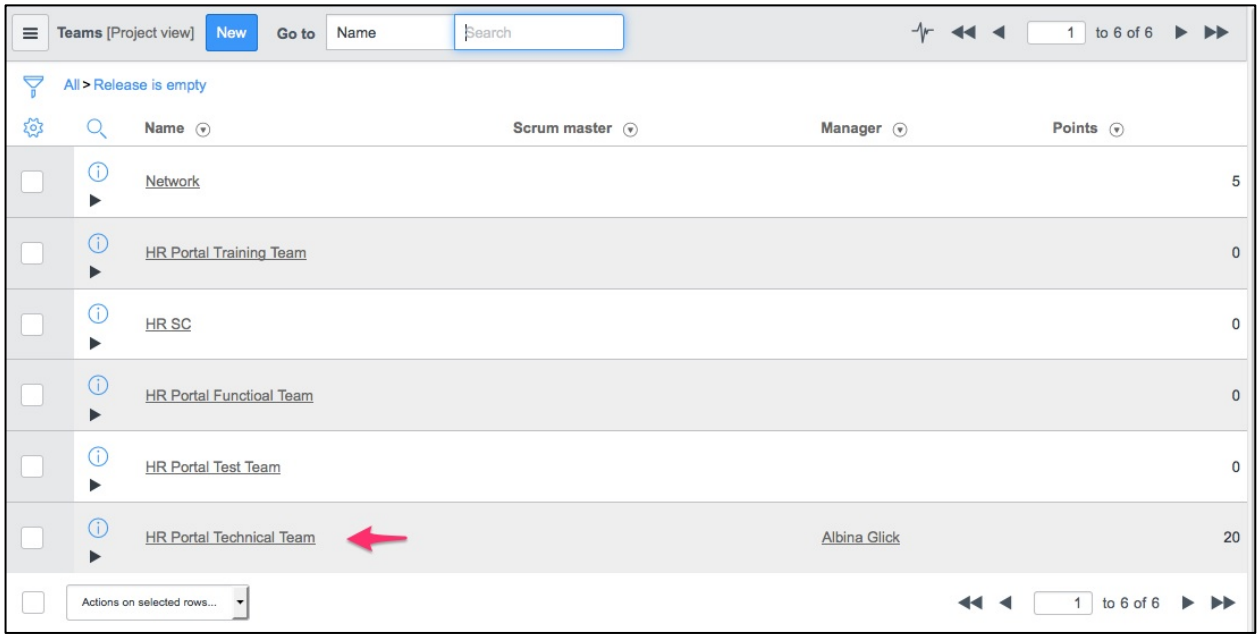
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Teams

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

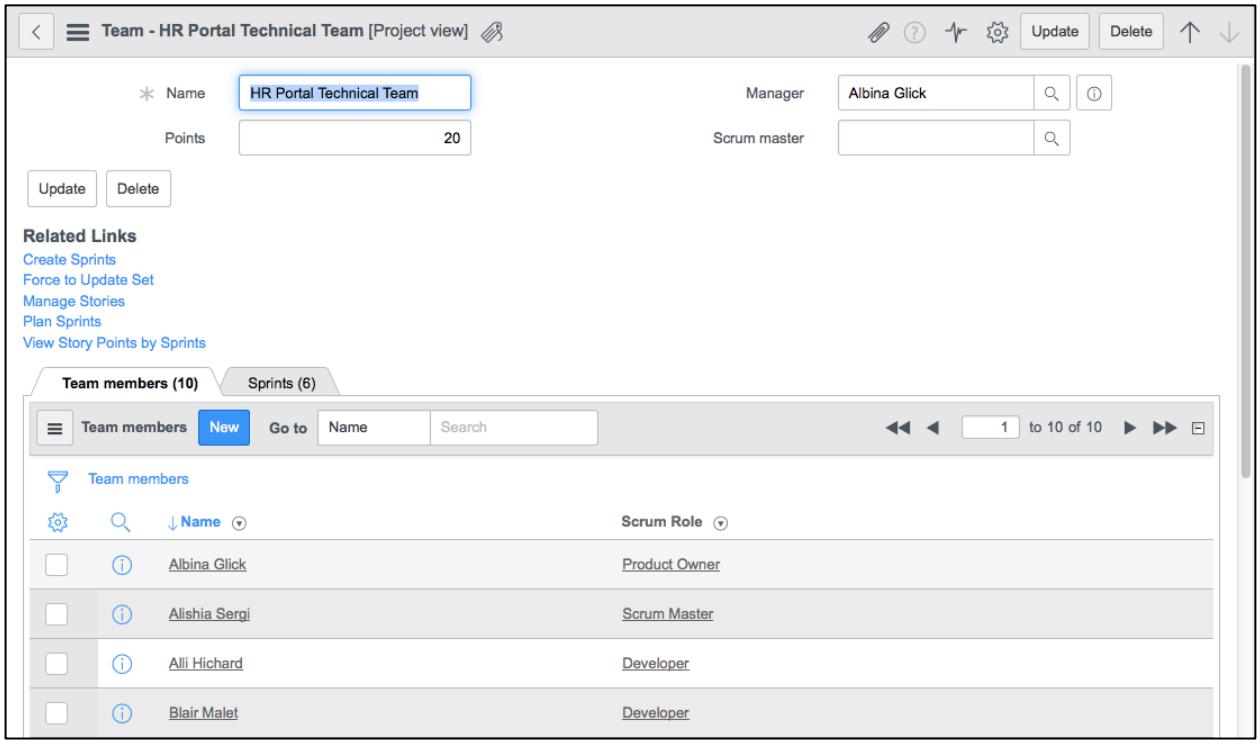


2. Select **HR Portal Technical Team** from the list of Teams to open the record.



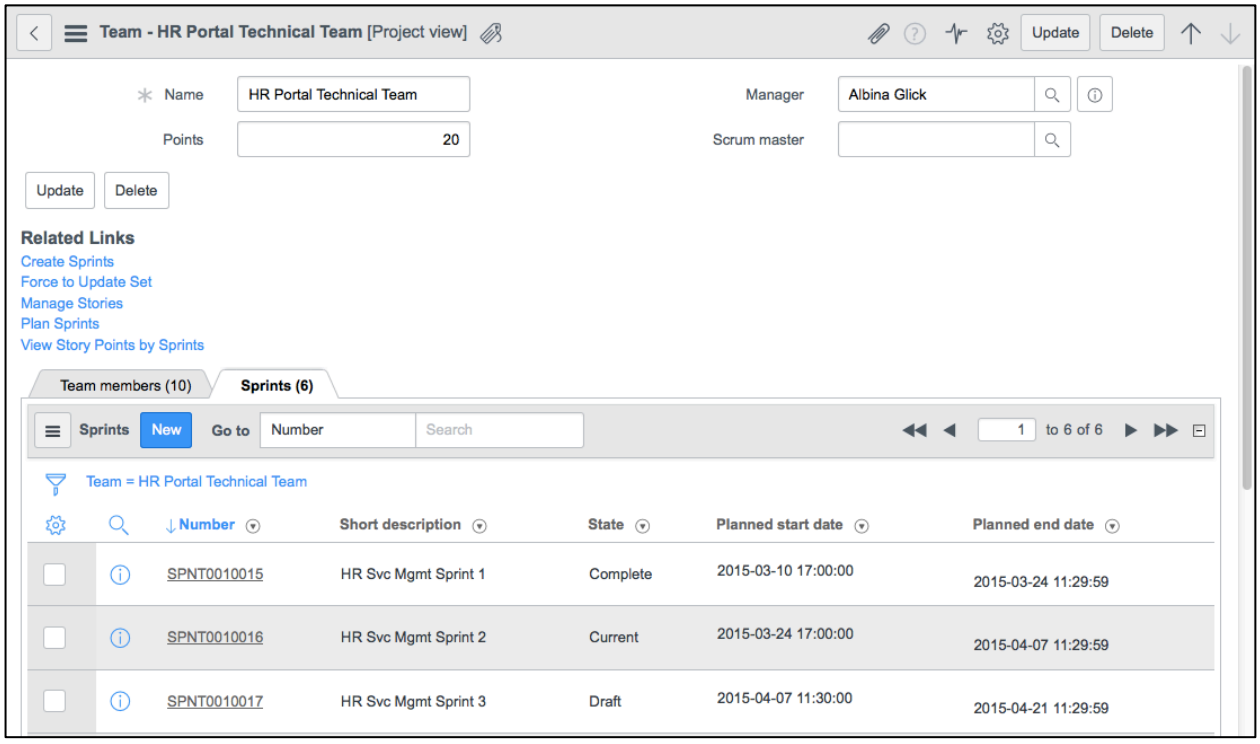
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3. Scroll down to Related Lists and view the **Team Members**.

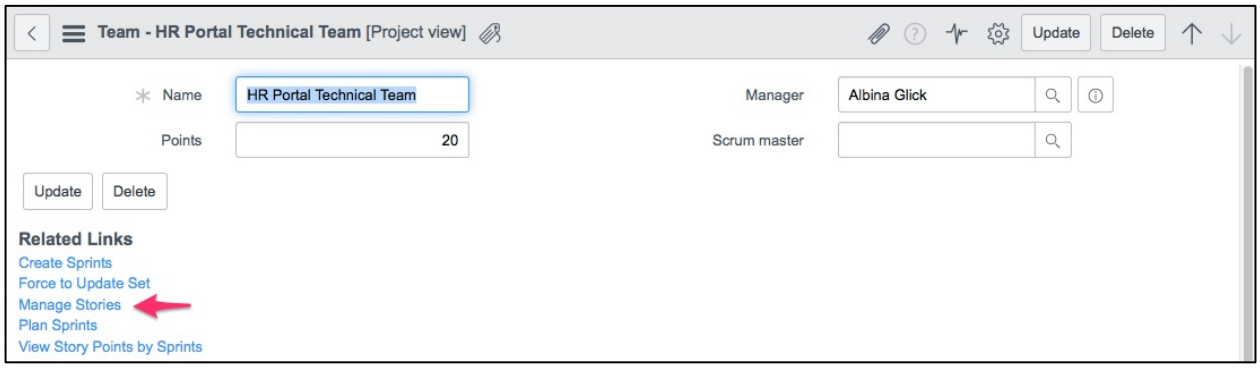


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4. Select the **Sprints** tab.

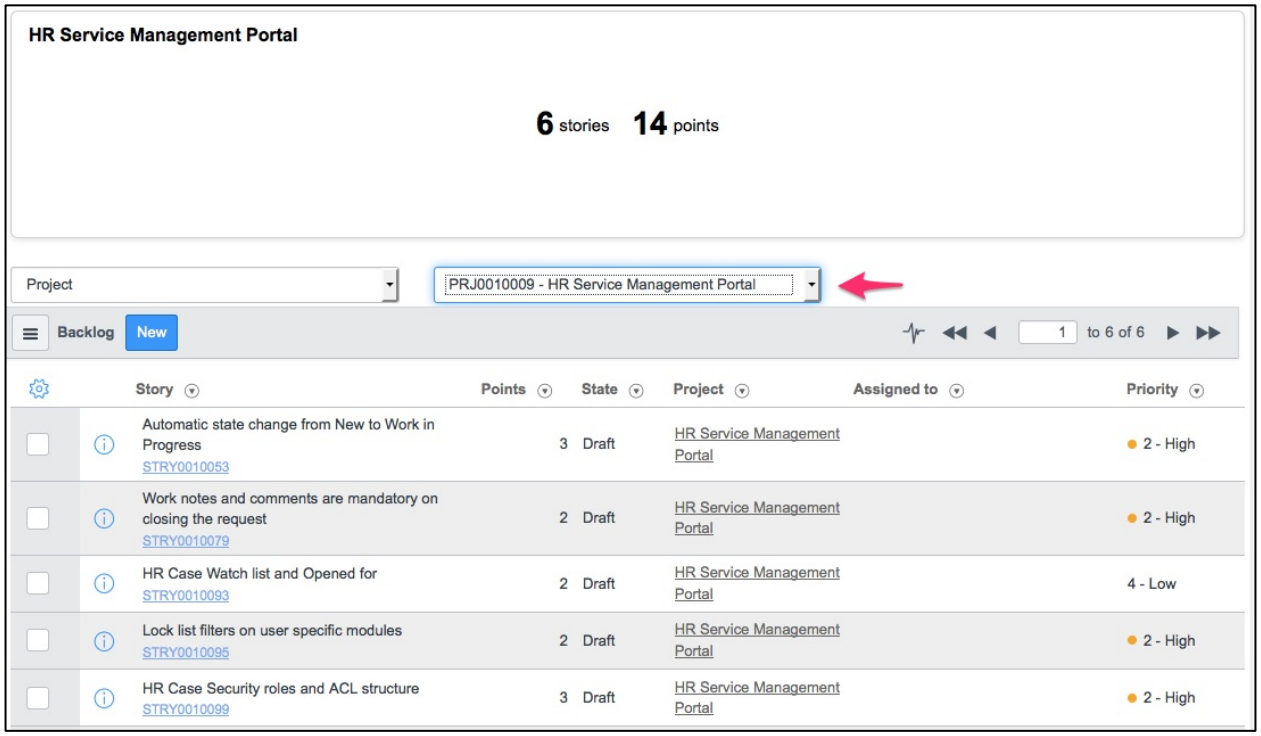


5. Under Related Links select **Manage Stories**.



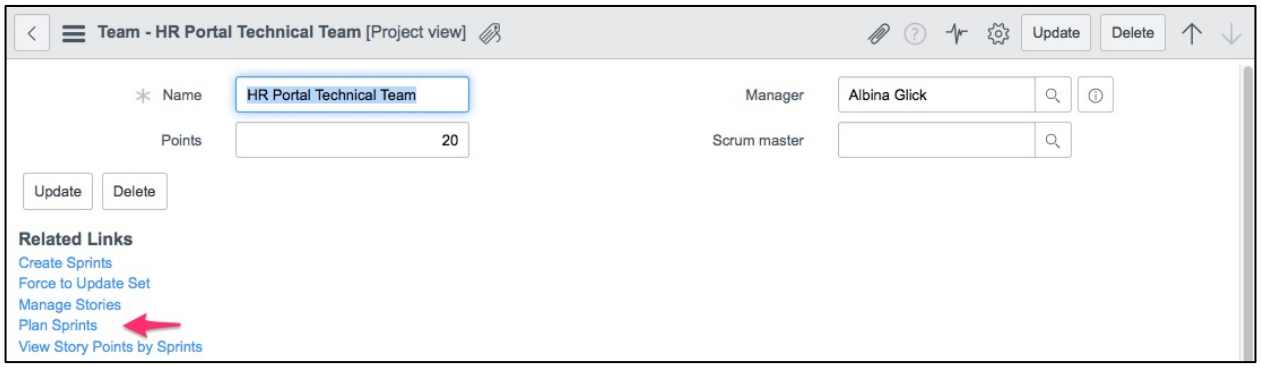
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6. Select the **HR Service Management Portal** Project.



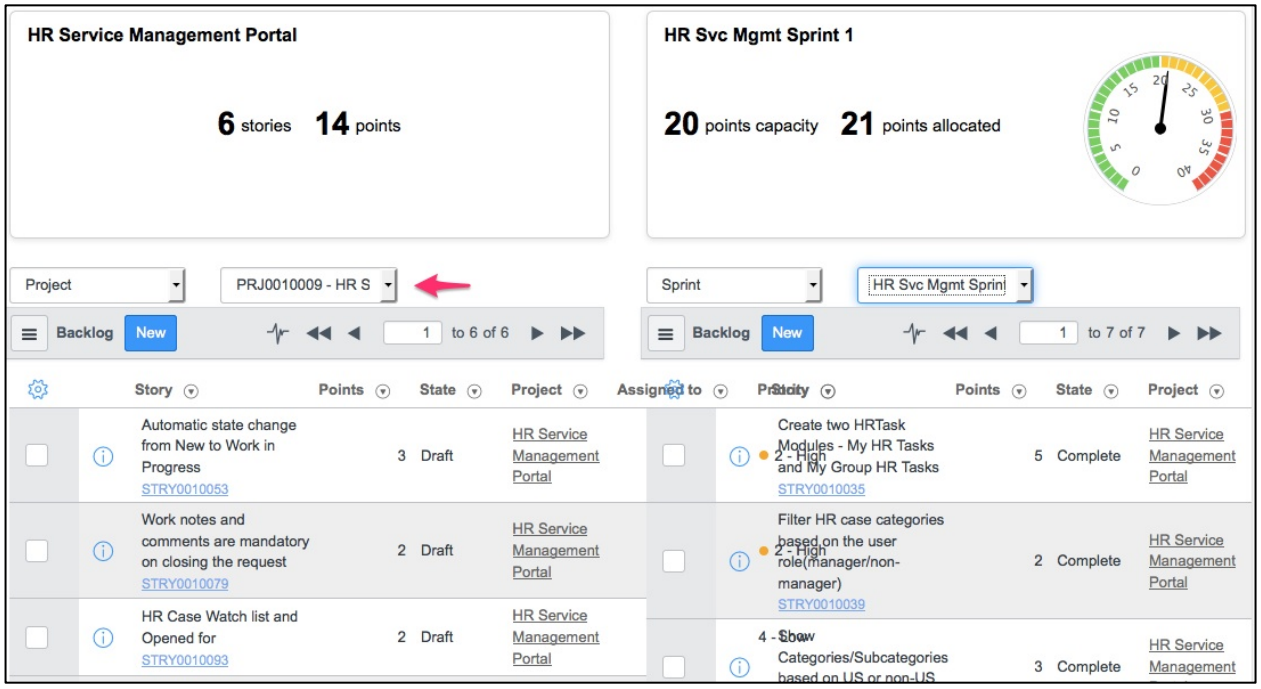
7. Click the **browser back button**.

8. Under Related Links select **Plan Sprints**.



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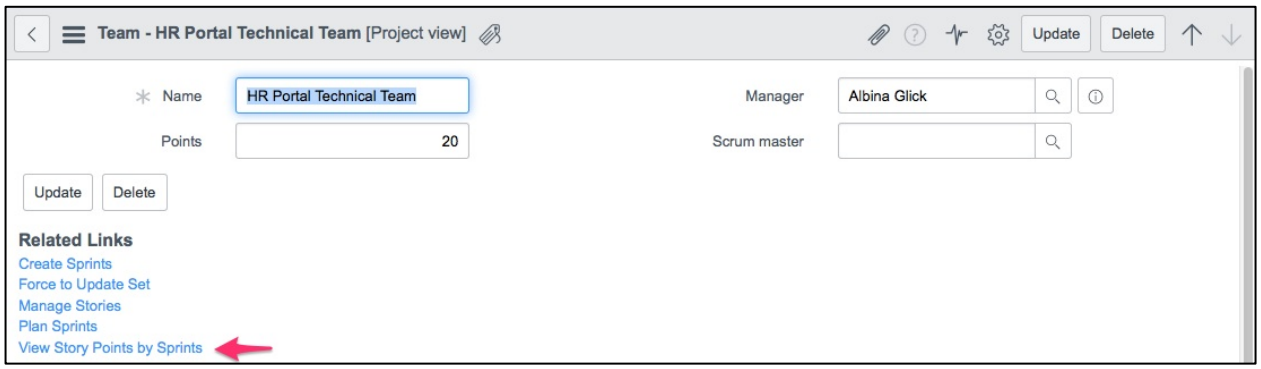
9. Select the **HR Service Management Portal** Project.



Note: You can choose Sprints from the right side to display Stories in a particular sprint. You can also drag Stories from the left pane (within Projects) into a Sprint in the right pane.

10. Click the **browser back button**.

11. Under Related Links select **View Story Points by Sprints**.



12. You can select a particular Project to limit what Story Points are displayed. For our lab, we only have one option.

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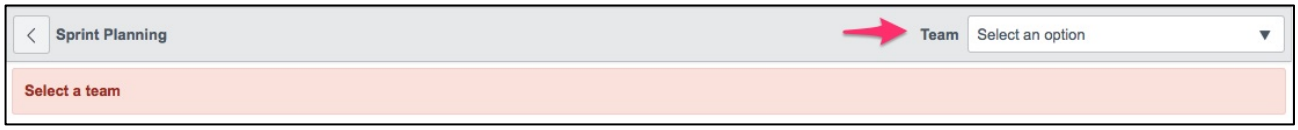
13. Close the window by clicking the **X** in the top-right corner.



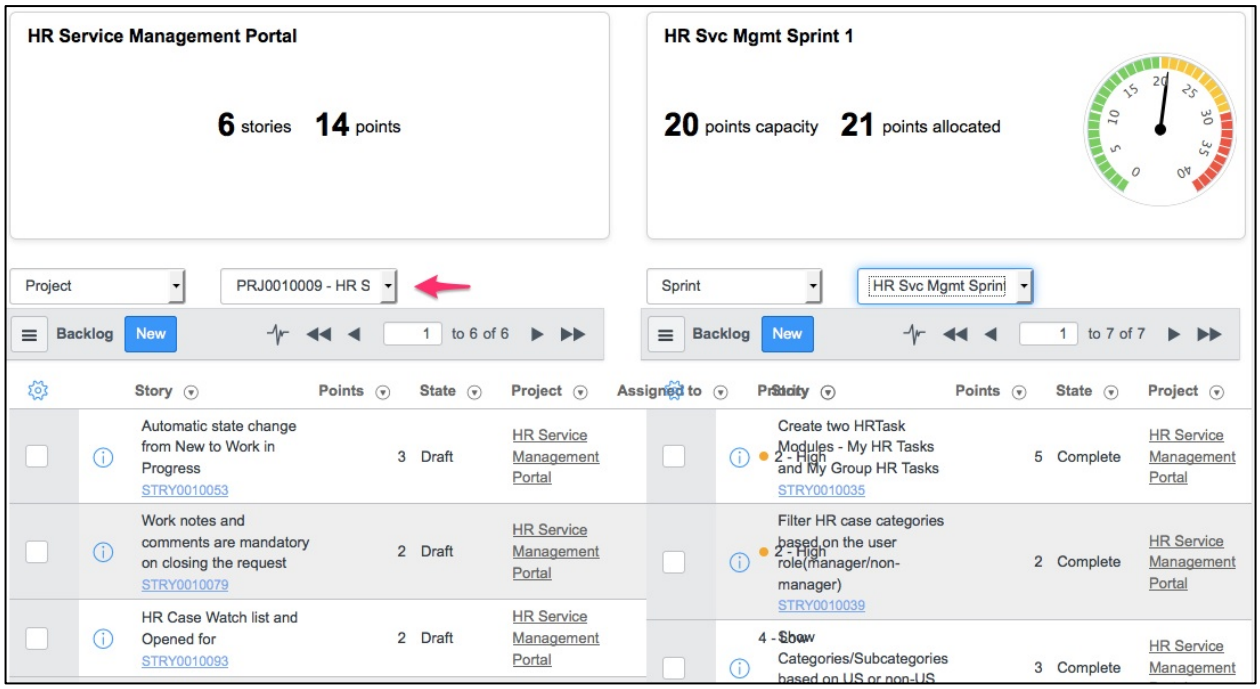
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Sprint Planning

1. Navigate to **Project > Agile > Sprint Planning**.
2. Select the **HR Portal Technical Team**.



3. The **Sprint Planning Console** is now populated with the selected team's Projects and Sprints.



Note: You can choose the Sprints from the right side to display Stories in a particular sprint. You can also drag Stories from the left pane (within Projects) into a Sprint in the right pane.

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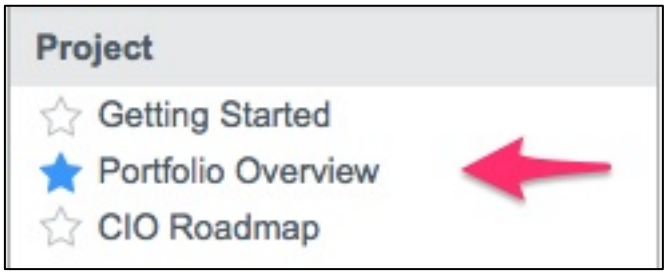
Lab Goal

Become familiar with the Reporting and Overview Consoles related to the Project Management Suite.

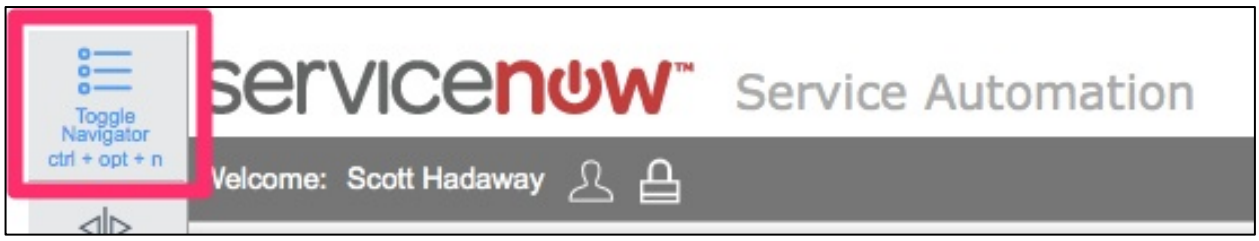
Lab 5
Reporting

Portfolio Overview

1. Navigate to **Project > Portfolio Overview**.



2. Toggle the **Navigator** in the top left corner of the screen to hide the navigator.



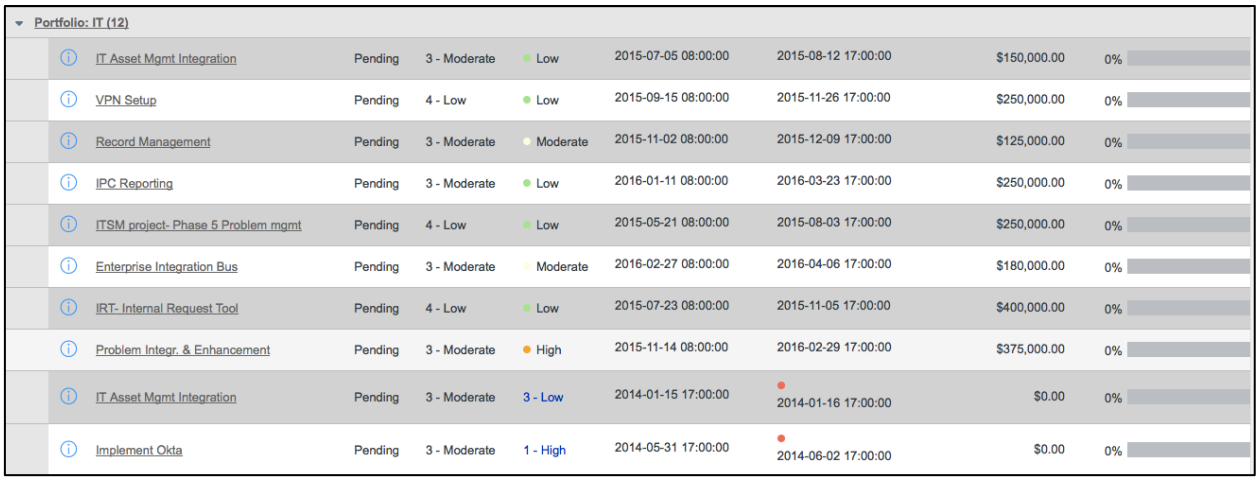
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3. The top Gauge is **Pending Projects (by Portfolio)**.

4. Find and Expand the **IT** Portfolio by clicking the triangle just to the left of the name.



5. You now see a list of all the Projects within the Portfolio.



6. Scroll down and investigate the remaining gauges on the Portfolio Overview. Note: These are all configurable and can be removed or displayed based on the user accessing the console.

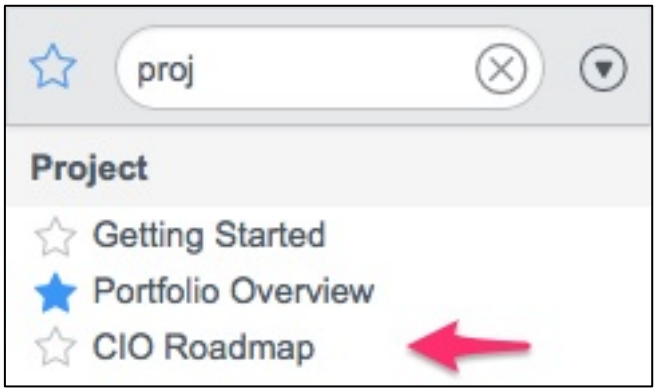
7. **Toggle the Navigator** in the top left corner of the screen to redisplay the navigator.



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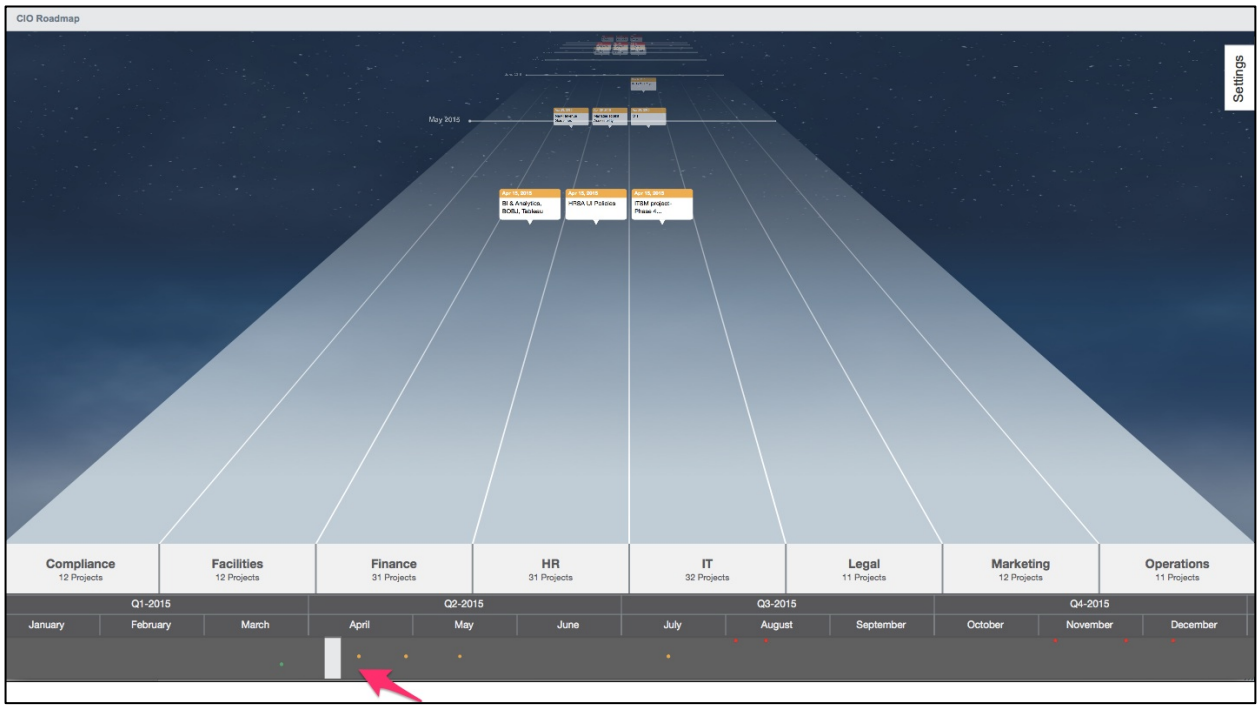
CIO Roadmap

1. Navigate to **Project > CIO Roadmap**.



2. The **CIO Roadmap** opens in a new tab.

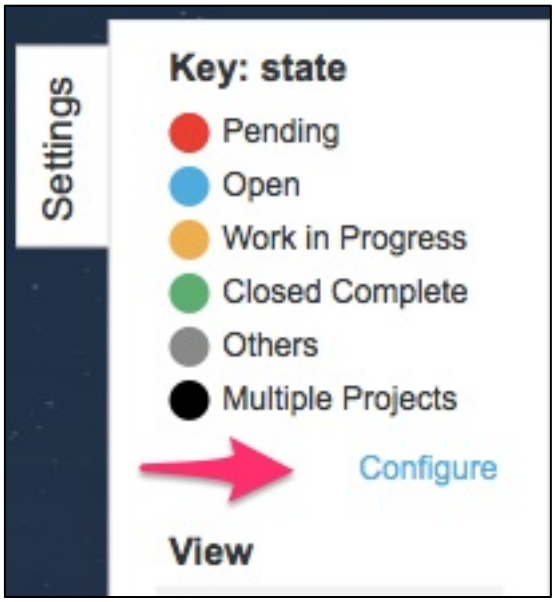
3. Select the **Date Slider** to move the roadmap forward and backwards by sliding the selector left and right.



4. Select **Settings** in the top-right corner of the screen.

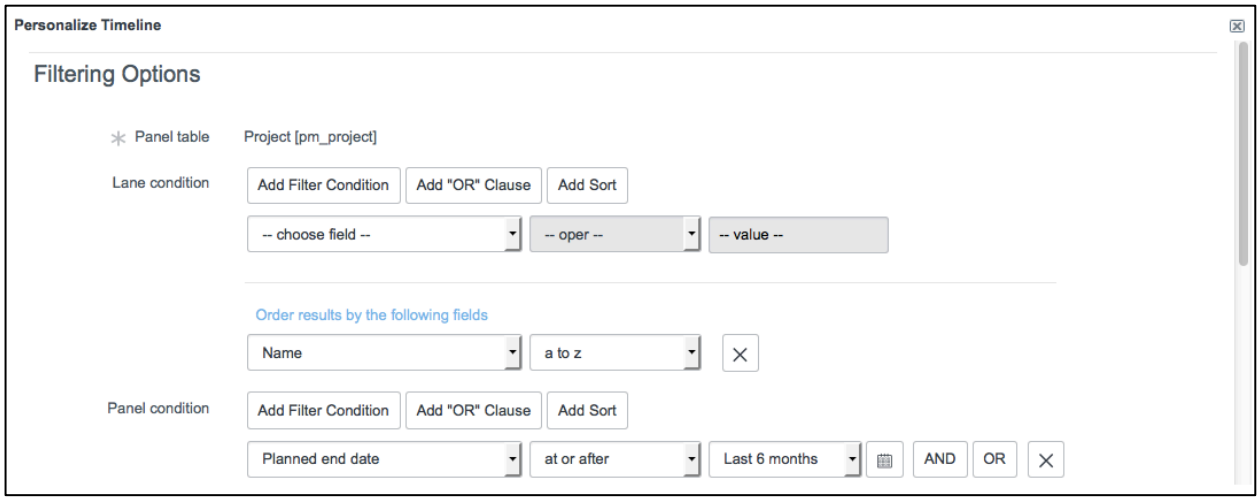
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5. Select **Configure** as denoted in the screenshot below.



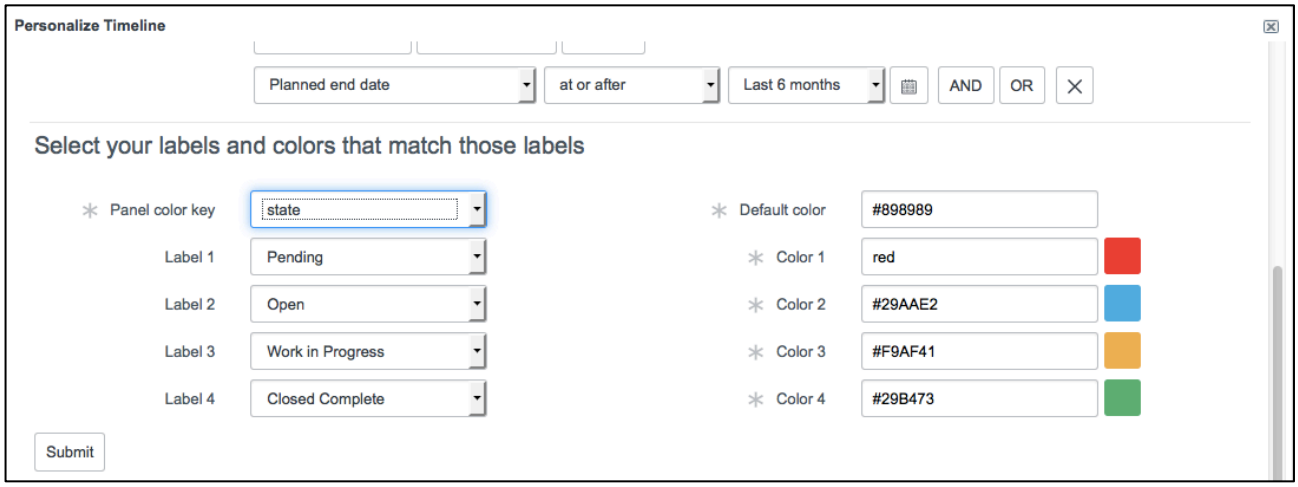
6. The **Personalize Timeline** Dialog opens.

7. On the top portion of the dialog you can configure the **Filtering Options** for your timeline.



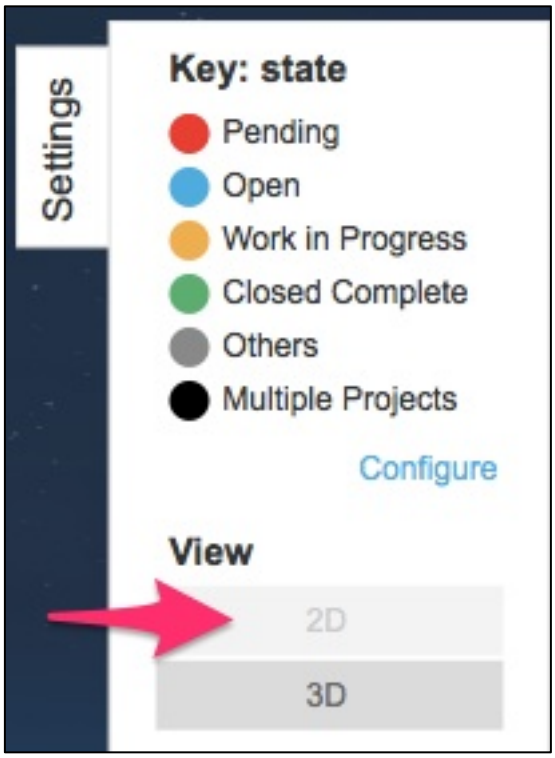
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8. On the bottom portion of the dialog you can configure the colors based on criteria.



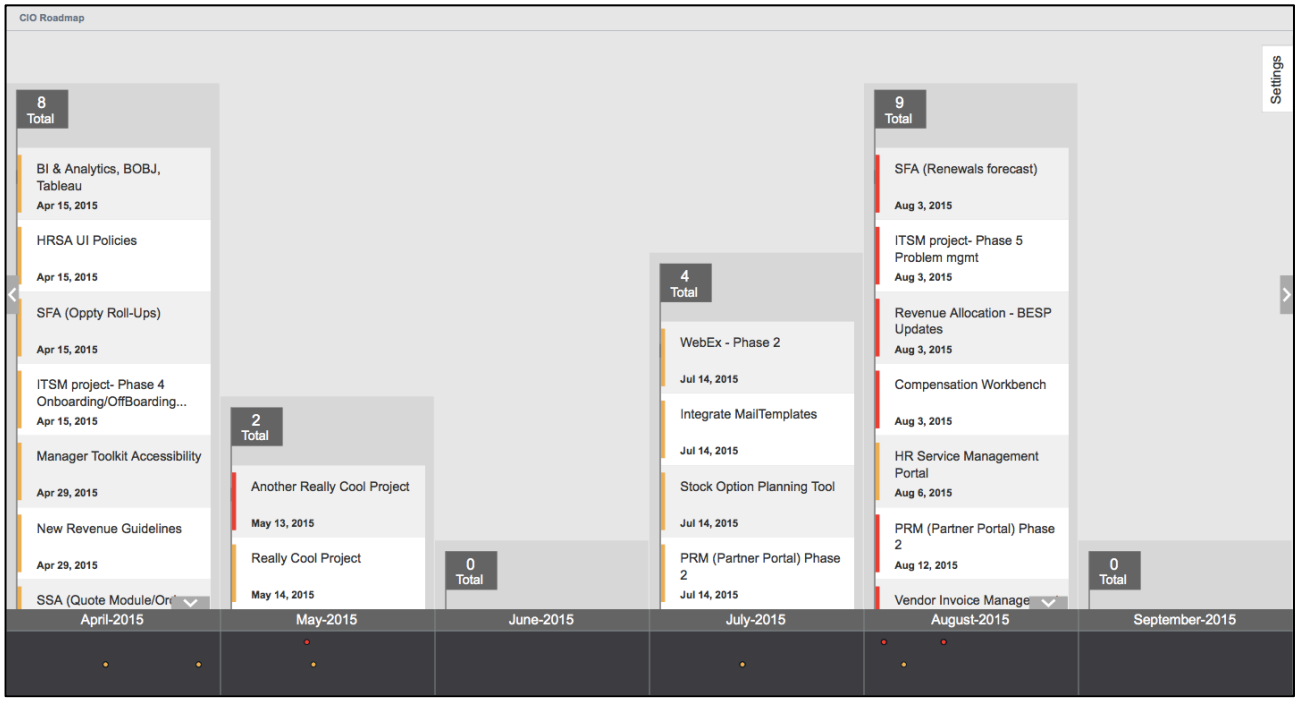
9. When you are done, click **Save** or the **X** in the top-right corner.

10. Click the **2D** as denoted in the screenshot below.

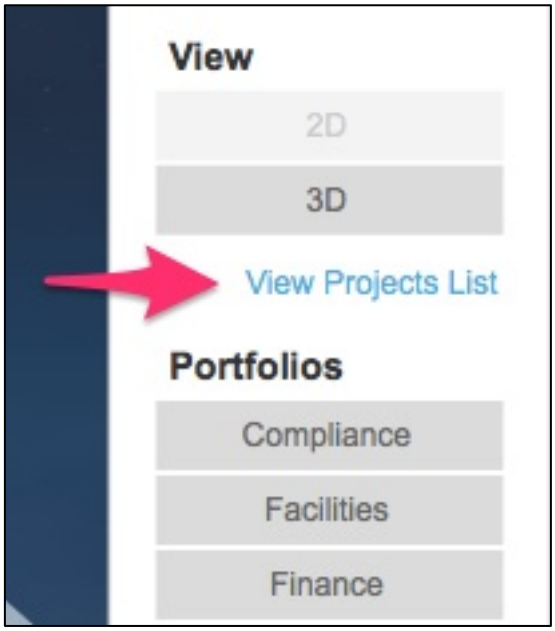


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11. The Roadmap now changes to a 2-dimensional view.

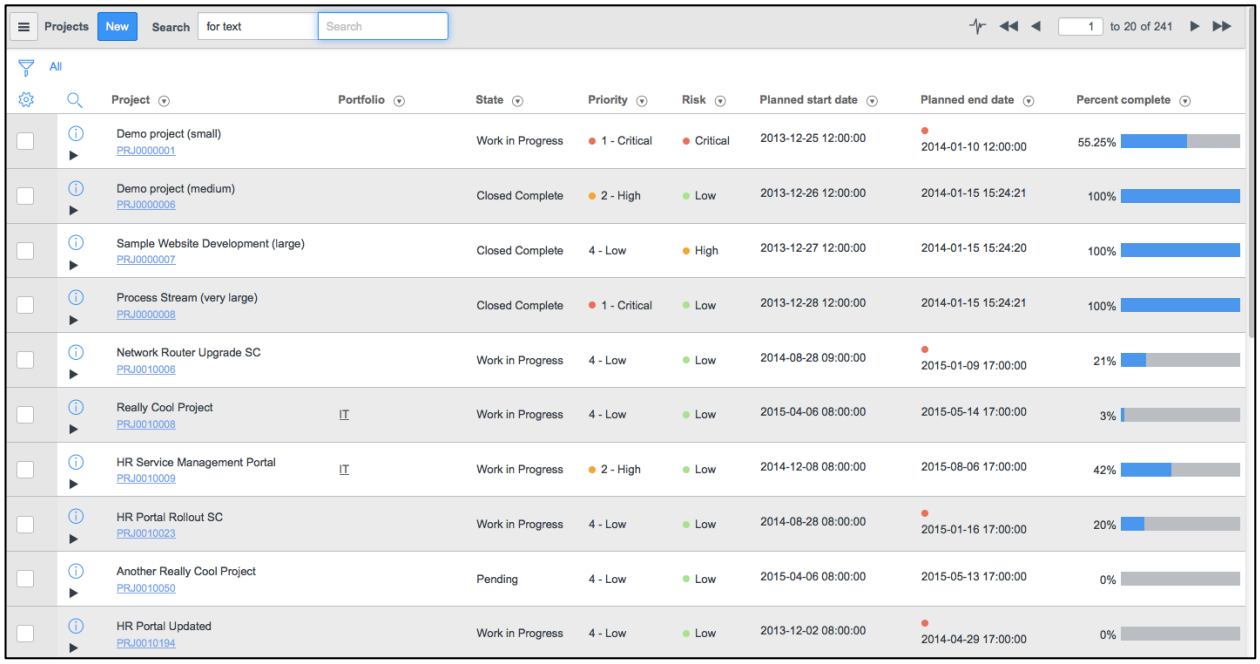


12. Click **View Projects List** as denoted in the screenshot below.



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13. A list of all the projects on the current timeline opens in a new tab.



Project	Portfolio	State	Priority	Risk	Planned start date	Planned end date	Percent complete
Demo project (small) PRJ0000001		Work in Progress	1 - Critical	Critical	2013-12-25 12:00:00	2014-01-10 12:00:00	55.25%
Demo project (medium) PRJ0000006		Closed Complete	2 - High	Low	2013-12-26 12:00:00	2014-01-15 15:24:21	100%
Sample Website Development (large) PRJ0000007		Closed Complete	4 - Low	High	2013-12-27 12:00:00	2014-01-15 15:24:20	100%
Process Stream (very large) PRJ0000008		Closed Complete	1 - Critical	Low	2013-12-28 12:00:00	2014-01-15 15:24:21	100%
Network Router Upgrade SC PRJ0010006		Work in Progress	4 - Low	Low	2014-08-28 09:00:00	2015-01-09 17:00:00	21%
Really Cool Project PRJ0010008	IT	Work in Progress	4 - Low	Low	2015-04-06 08:00:00	2015-05-14 17:00:00	3%
HR Service Management Portal PRJ0010009	IT	Work in Progress	2 - High	Low	2014-12-08 08:00:00	2015-08-06 17:00:00	42%
HR Portal Rollout SC PRJ0010023		Work in Progress	4 - Low	Low	2014-08-28 08:00:00	2015-01-16 17:00:00	20%
Another Really Cool Project PRJ0010050		Pending	4 - Low	Low	2015-04-06 08:00:00	2015-05-13 17:00:00	0%
HR Portal Updated PRJ0010194		Work in Progress	4 - Low	Low	2013-12-02 08:00:00	2014-04-29 17:00:00	0%

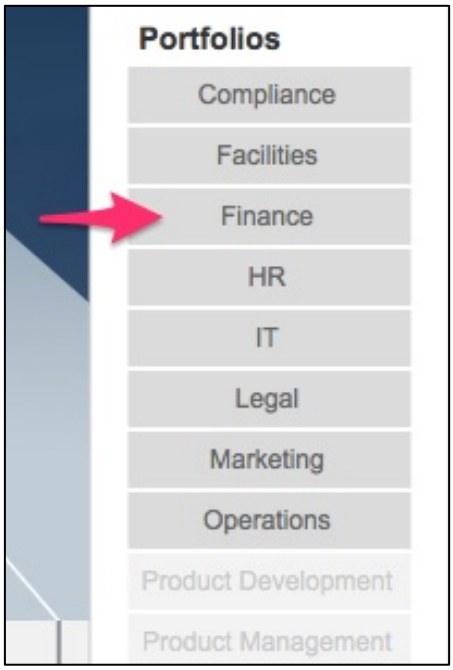
14. **Go back to CIO Roadmap tab** or simply **Close Project List tab**.

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15. You can select or deselect Portfolios by clicking them as denoted in the screenshot below.

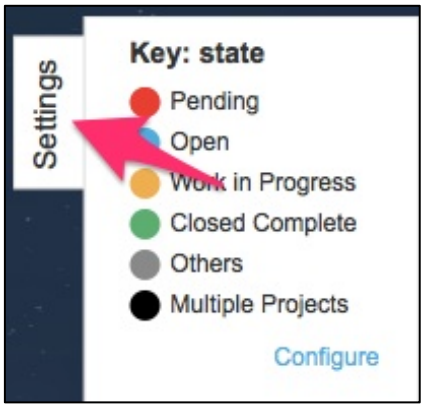
16. Click the **Finance** Portfolio. This portfolio will be removed from the roadmap.

17. Click on another Portfolio. It will be added to the roadmap.



Note: You are limited to 8 Portfolios on the CIO Roadmap.

18. Click the **Settings** area again to close the Settings Dialog.

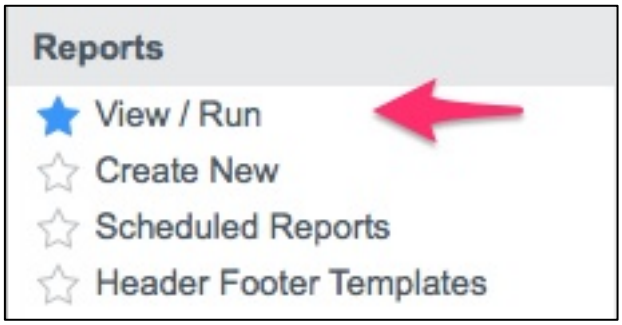


19. Close the **CIO Roadmap** tab.

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Out of Box Project Reports

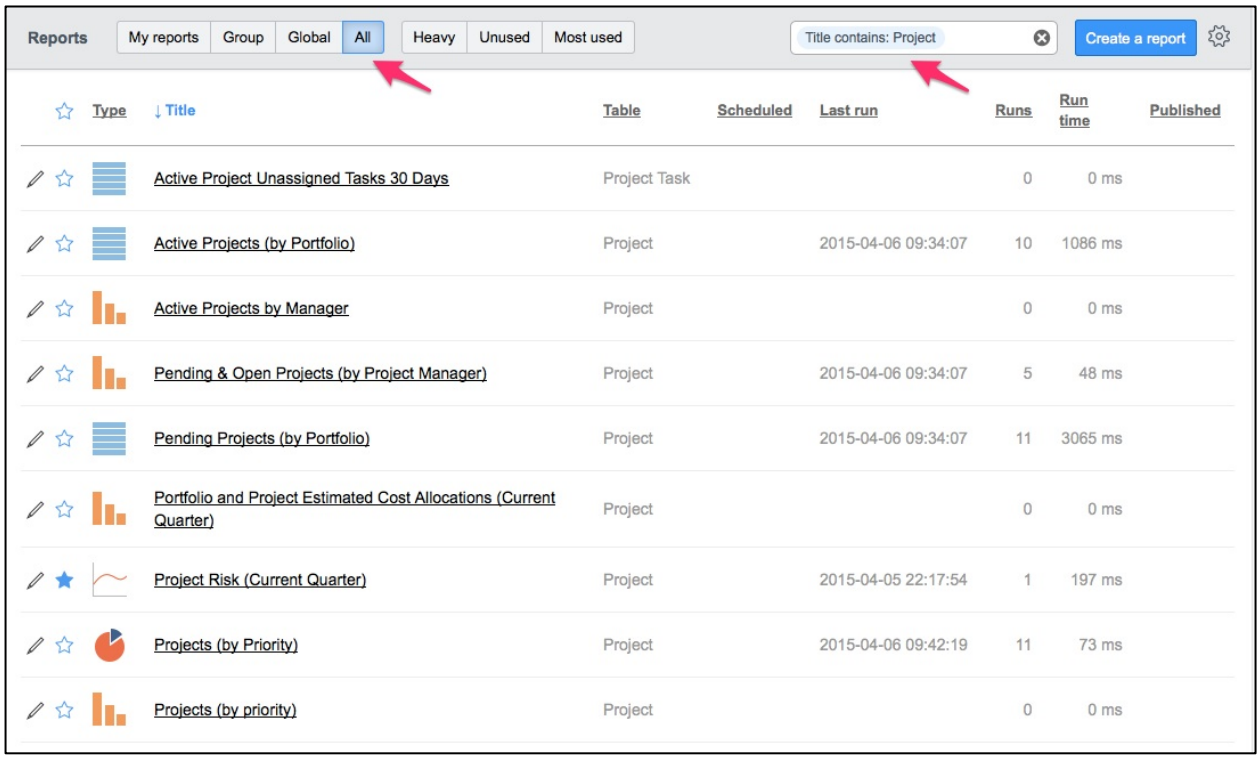
1. Navigate to **Reports > View Run**.



2. Open the **Reporting Console**.

3. Select **All** denoted in the screenshot below.

4. Type **Project** Filter Field as denoted in the screenshot below.



Type	Title	Table	Scheduled	Last run	Runs	Run time	Published
	Active Project Unassigned Tasks 30 Days	Project Task			0	0 ms	
	Active Projects (by Portfolio)	Project		2015-04-06 09:34:07	10	1086 ms	
	Active Projects by Manager	Project			0	0 ms	
	Pending & Open Projects (by Project Manager)	Project		2015-04-06 09:34:07	5	48 ms	
	Pending Projects (by Portfolio)	Project		2015-04-06 09:34:07	11	3065 ms	
	Portfolio and Project Estimated Cost Allocations (Current Quarter)	Project			0	0 ms	
	Project Risk (Current Quarter)	Project		2015-04-05 22:17:54	1	197 ms	
	Projects (by Priority)	Project		2015-04-06 09:42:19	11	73 ms	
	Projects (by priority)	Project			0	0 ms	

5. Investigate the out of box reports provided with Project Portfolio Management.

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