# Lab Guide

## Capturing and Managing Ideas

## with Demand Management 201

Dale Mooney & Nacime Alfaras

Default Login / Password:

admin / Knowledge16

itil / Knowledge16

employee / Knowledge16

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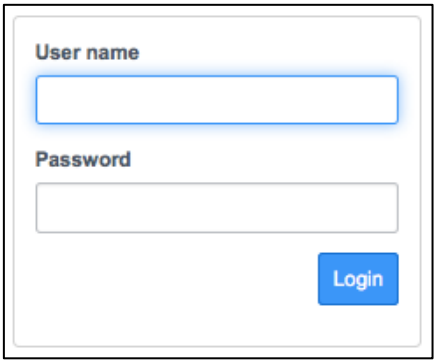
# Lab Goal

This lab explains how to perform Pre-Lab Setup and confirm that you have the proper configuration and required data for the completion of the labs.

**Pre-Lab Configuration**

## Log in to Your Lab Instance

1. Navigate to the unique instance URL provided.
2. Log in using the **admin** credentials provided.




## Plugin Confirmation

1. Navigate to **System Definition > Plugins**.
2. Filter the list by ***Project**.

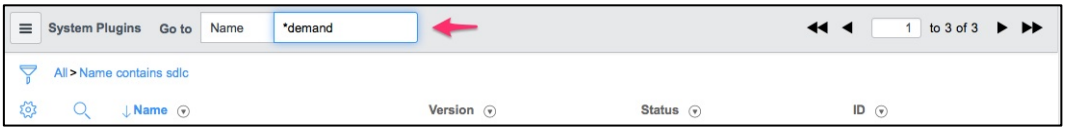



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3. Find **Project Management** and **Project Portfolio Suite** and confirm they are both enabled. If either is not **Active**, please raise your hand.




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



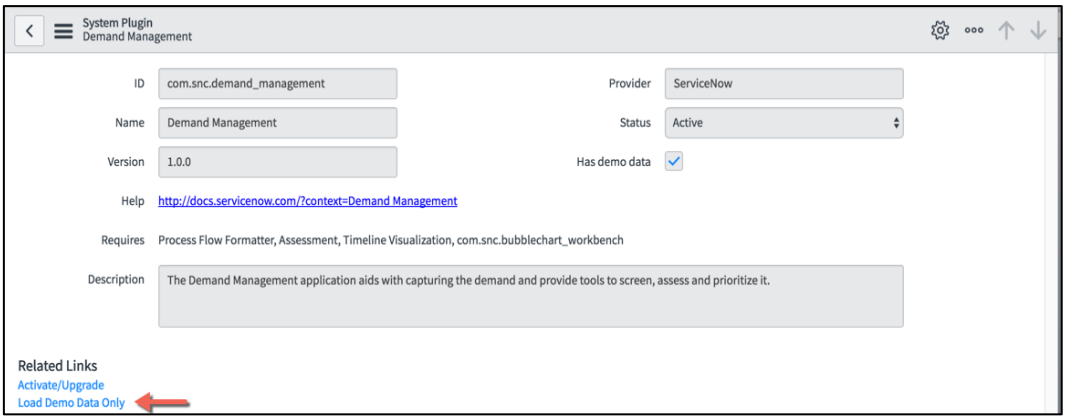

5. Find **Demand Management** and confirm that it is **Active**.




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

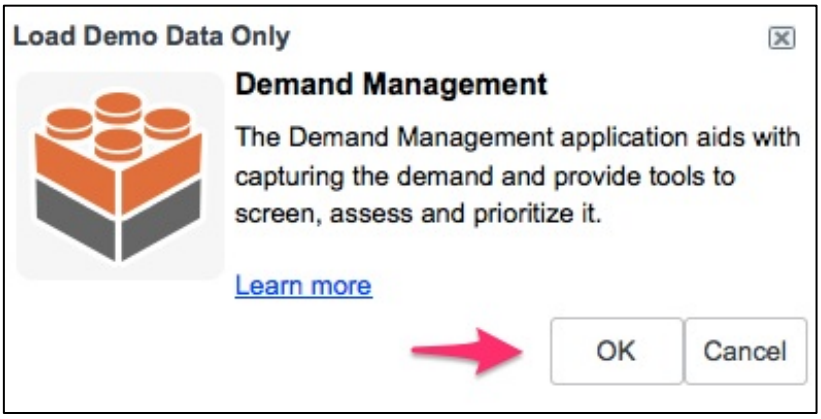



7. Click **Load Demo Data Only**.




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8. Click **OK**.



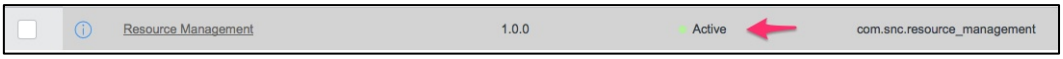

9. Click **View Plugin List** to close the window after the data load completes.



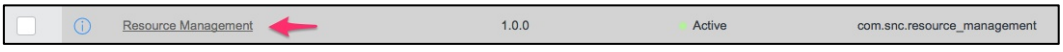

10. Filter the list by ***Resource**.




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

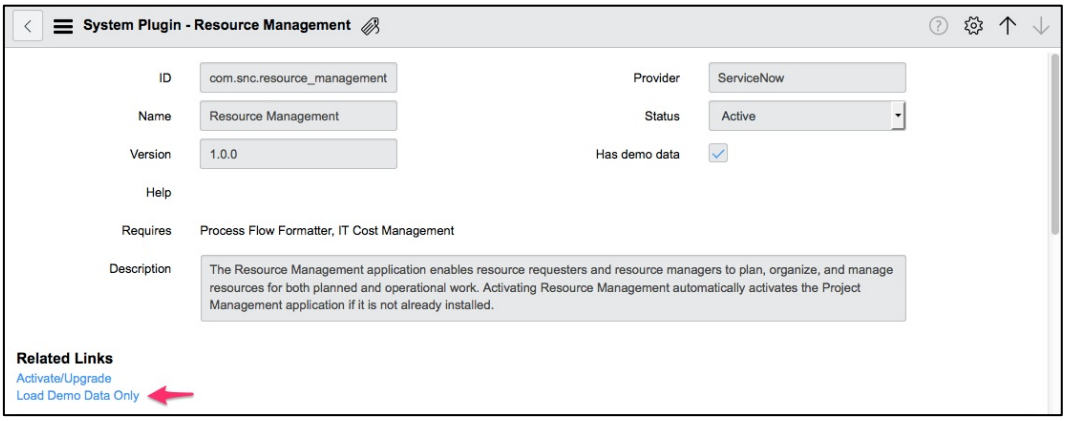



12. Click **Resource Management** to open the plugin.

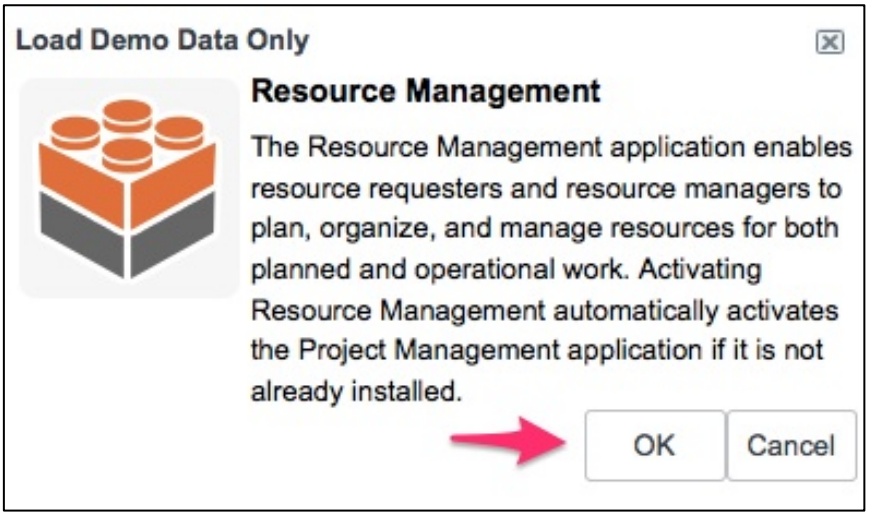



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13. Click **Load Demo Data Only**.




14. Click **OK**.




15. Click **View Plugin List** to close the window after the data load has completed.

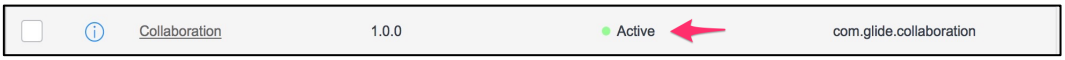



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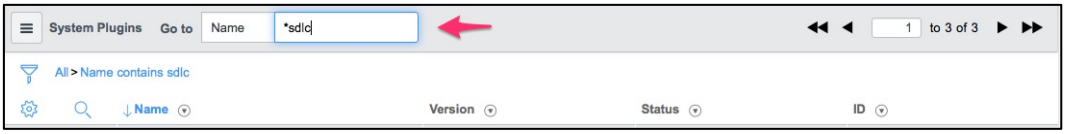
16. Filter the list by ***Collaboration**.



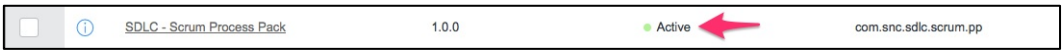

17. Find **Collaboration** and confirm that it is **Active**.



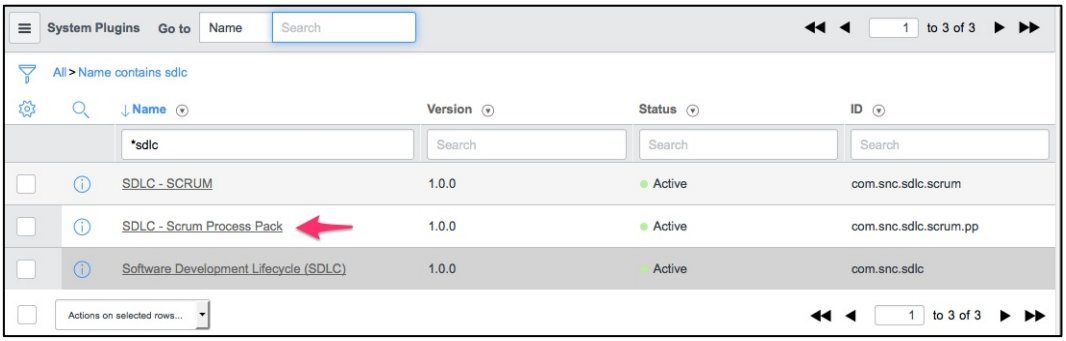

18. Filter the list by ***SDLC**.




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

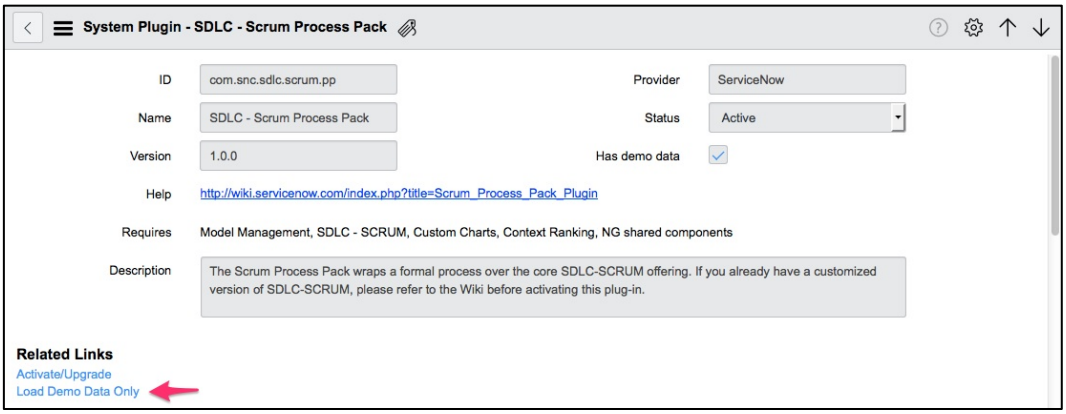



20. Click **SDLC - Scrum Process Pack** to open the plugin.




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




22. Click **OK**.



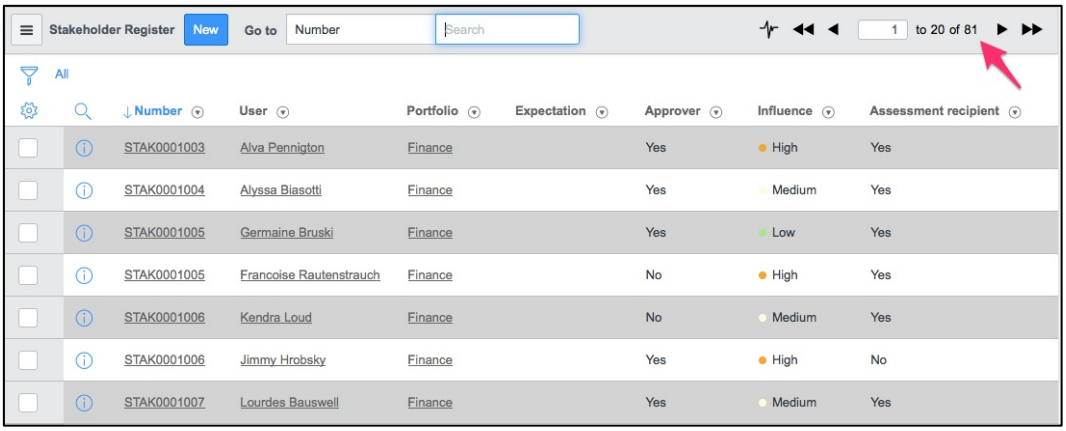

23. Click **View Plugin List** to close window after the data load completes.




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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.

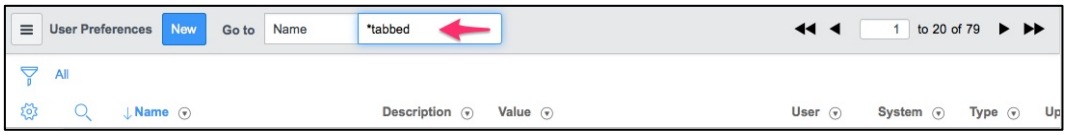



| Number | User | Portfolio | Expectation | Approver | Influence | Assessment recipient |
|---|---|---|---|---|---|---|
| STAK0001003 | Alva Pennigton | Finance | | Yes | High | Yes |
| STAK0001004 | Alyssa Biasotti | Finance | | Yes | Medium | Yes |
| STAK0001005 | Germaine Bruski | Finance | | Yes | 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 |

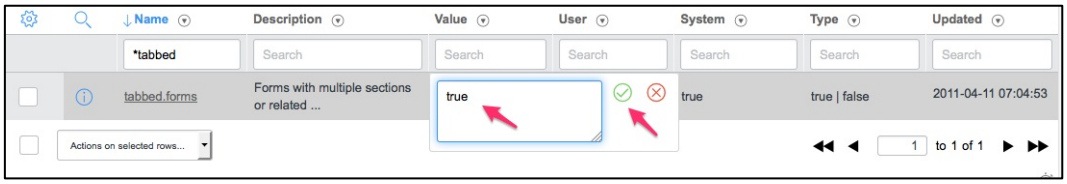
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## Set Tabbed View for All Users

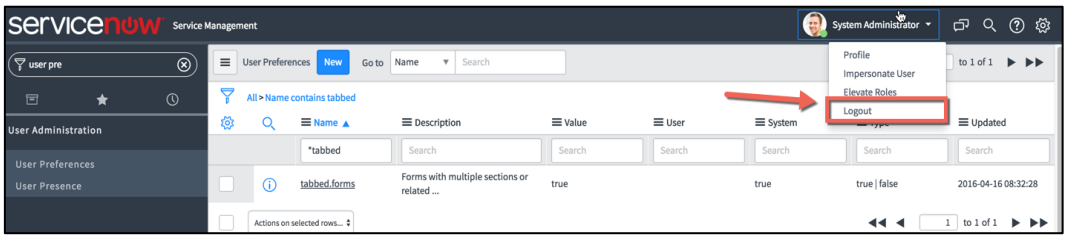
1. Navigate to **User Administration > User Preferences**.
2. Filter the list by ***tabbed** in the **Name** field




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




4. Click the **green check mark**.
5. Click **System Administrator and then Logout**. Log back in to allow the settings to take effect.




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# Lab Goal

This lab familiarizes you with the Portfolio Management Module and its relationships to Project Management.

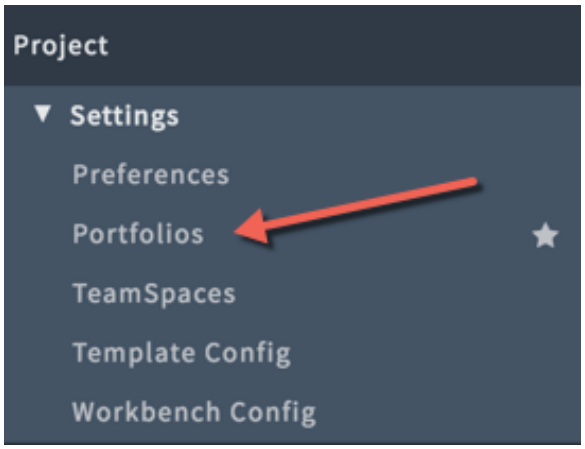
**Lab 1.0 Portfolio Management**

## Overview

A portfolio is a collection of related projects and demands. 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.

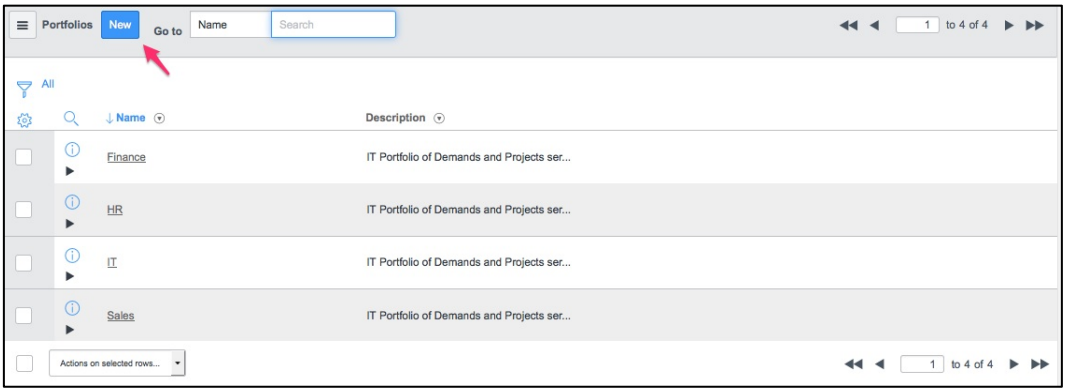
## Create a Portfolio

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



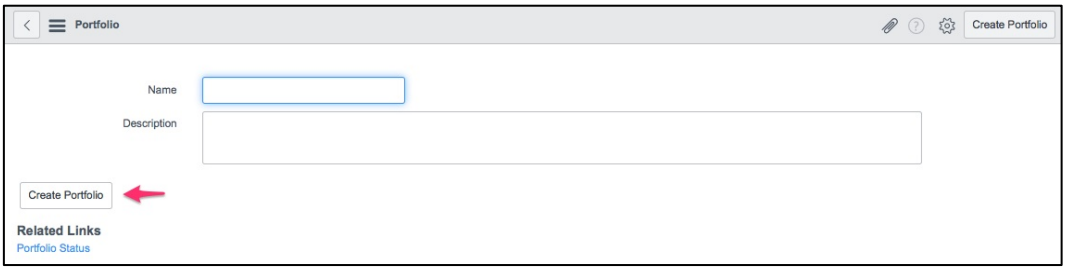

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2. Click the **New** button on the list in the right panel.




3. Provide the following:

   - **Name:** A unique name that summarizes the projects and demands included in this portfolio. (E.g. “Really Cool Portfolio”)
   - **Description:** Create a description that adequately explains the various projects and demands attached to it.




4. Click **Create Portfolio**.

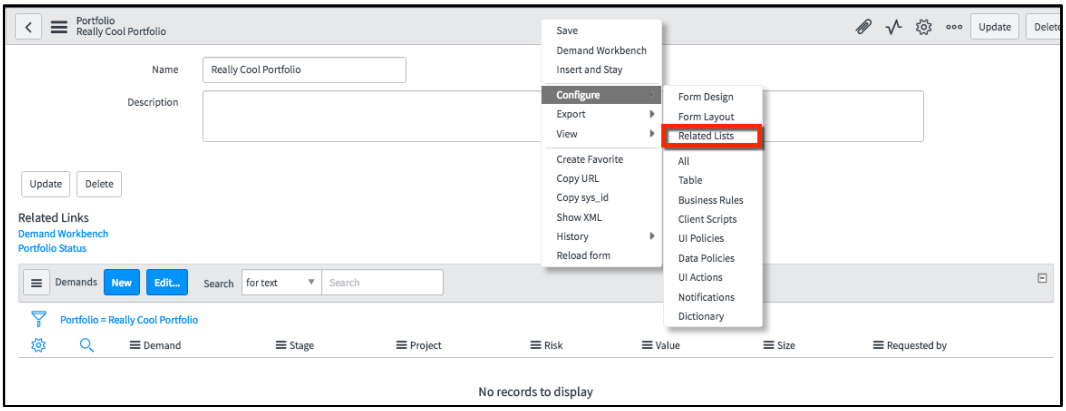
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# Add Stakeholder Register Related List to Portfolio Form

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

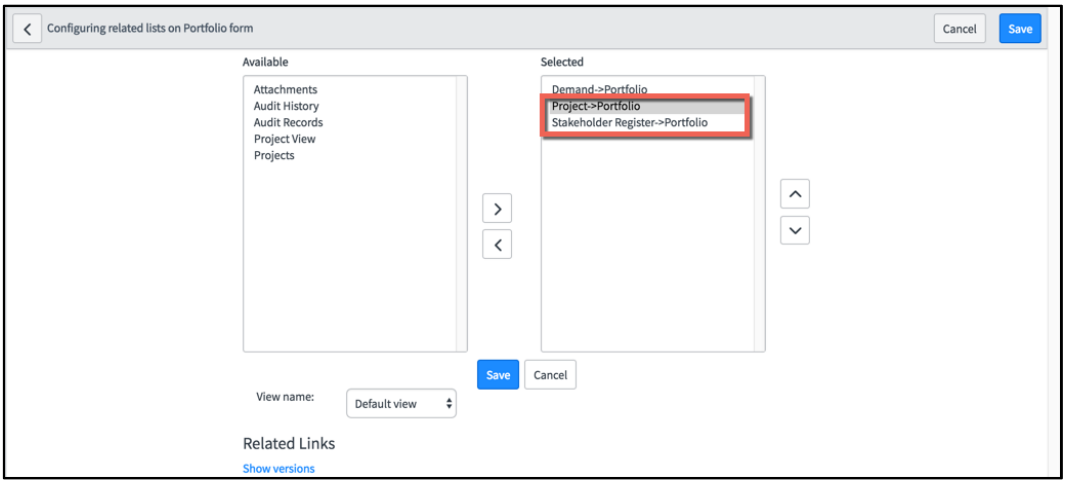



2. Select **Configure > Related Lists** from the context menu list.




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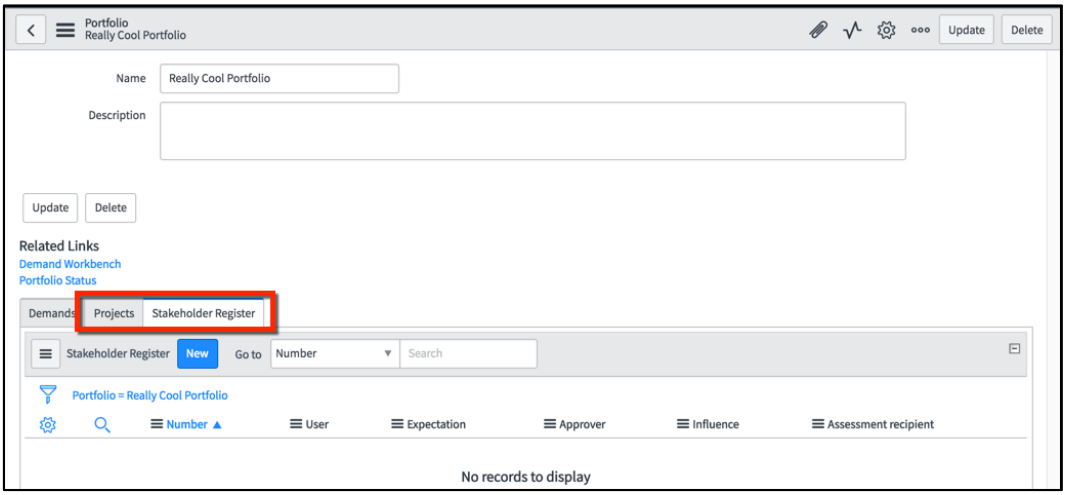
3. Confirm that **Stakeholder Register > Portfolio** and **Project > Portfolio** are in the right side panel.




4. If they are not in the right side panel, find them in the **Available** slush bucket and double-click.

5. Click **Save**.

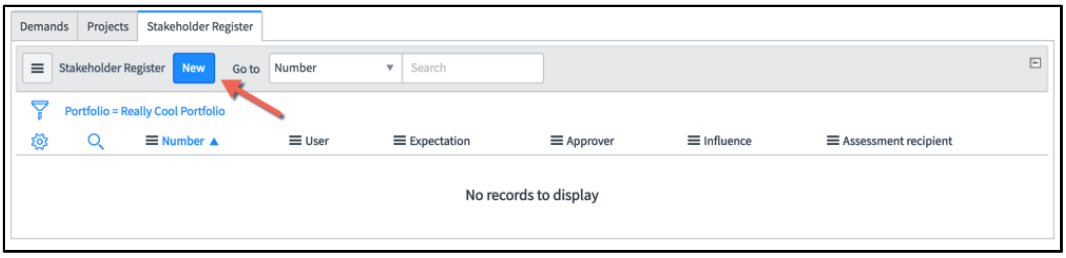
6. Your Portfolio should now include the related list highlighted below:




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## Add Stakeholders to the Portfolio

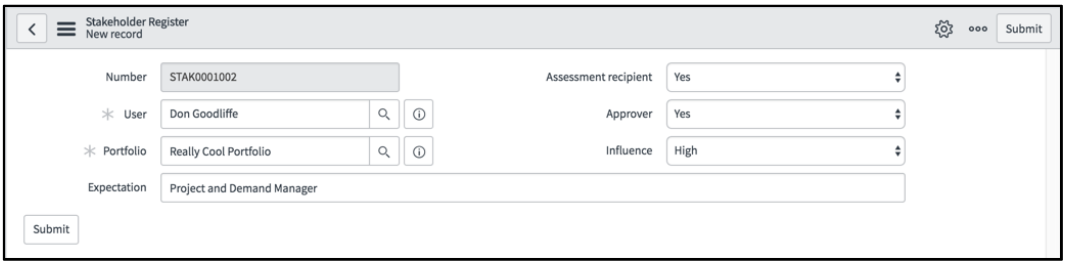
1. Open the **Stakeholder Register** Tab**.**




2. Click **New**.

3. Provide the following:

   - User: **Don Goodliffe**
   - Assessment recipient: **Yes**
   - Approver: **Yes**
   - Influence: **High**
   - Expectation: Be descriptive about person's involvement with the portfolio like PMO, Executive Sponsor, etc.

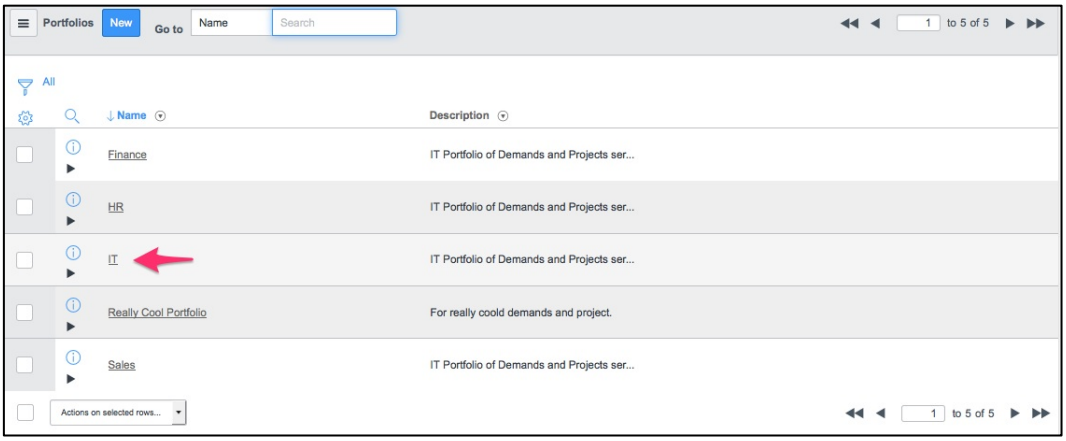



4. Click **Submit**. You return to the Portfolio Record.

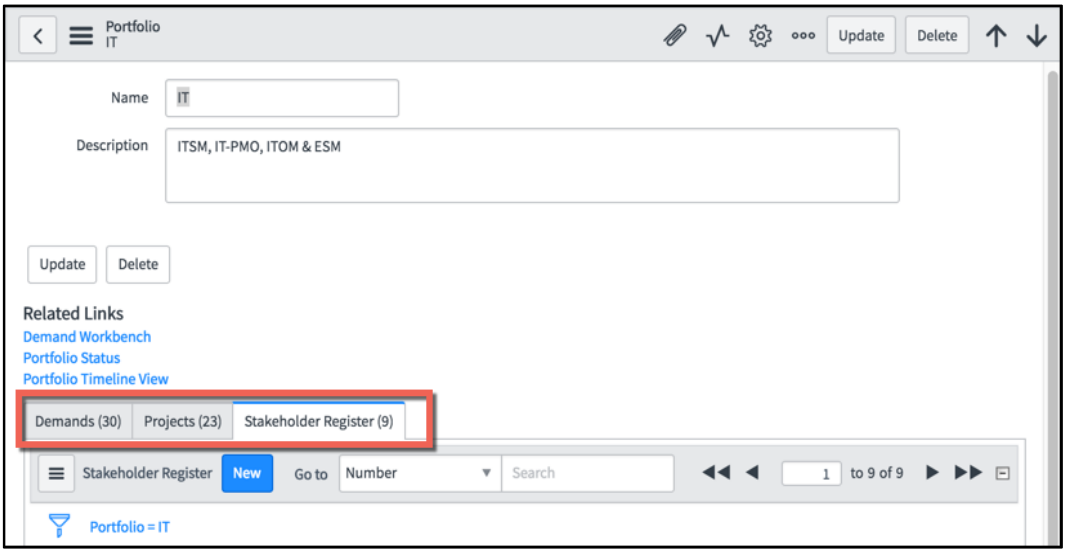
5. On the Portfolio record, click **Update**. You return to the list of Portfolios.

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6. Click on **IT** to open the IT Portfolio in the list of **Portfolios**.

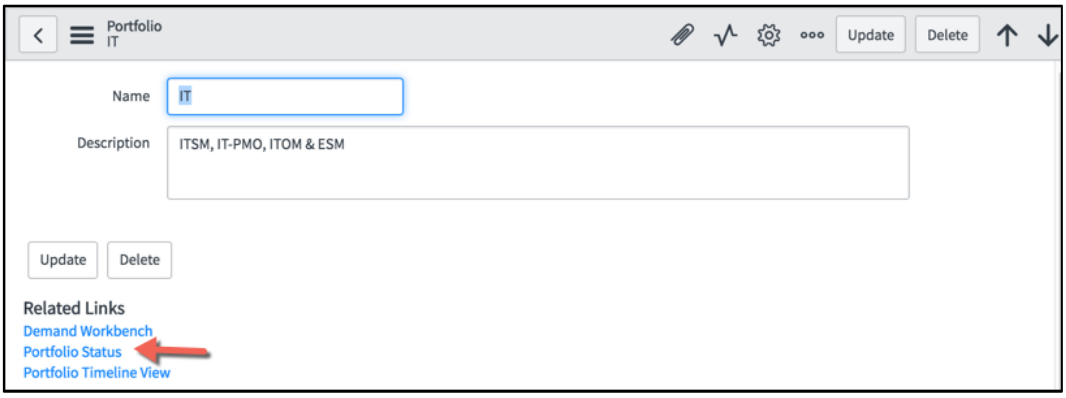


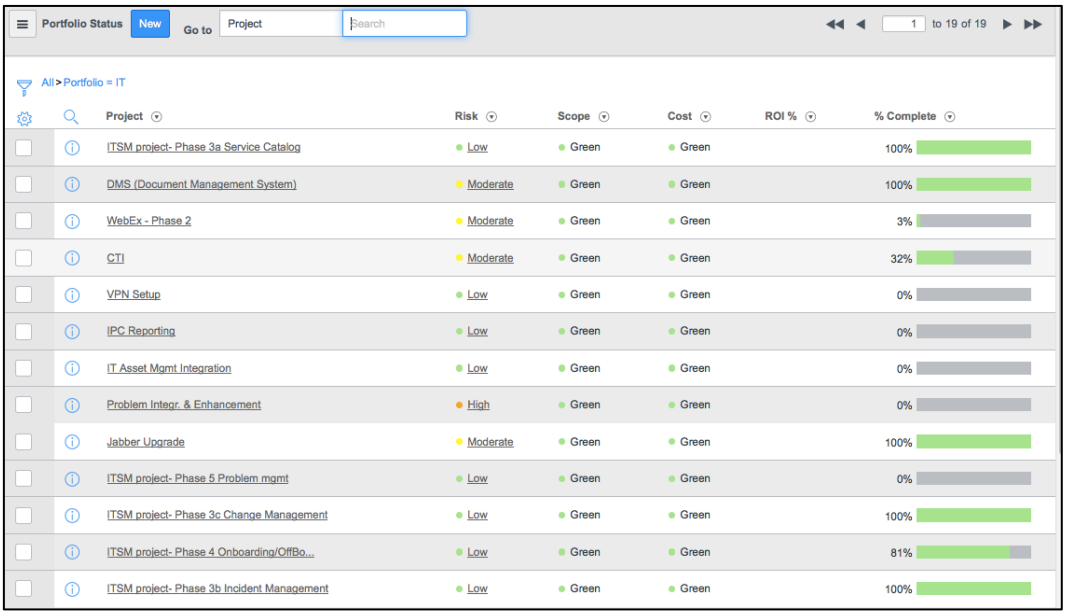

7. Note that there are several **Demands**, **Projects**, and **Stakeholder** records within the related list.




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8. Click **Portfolio Status** to access a list of Projects included in the IT portfolio.

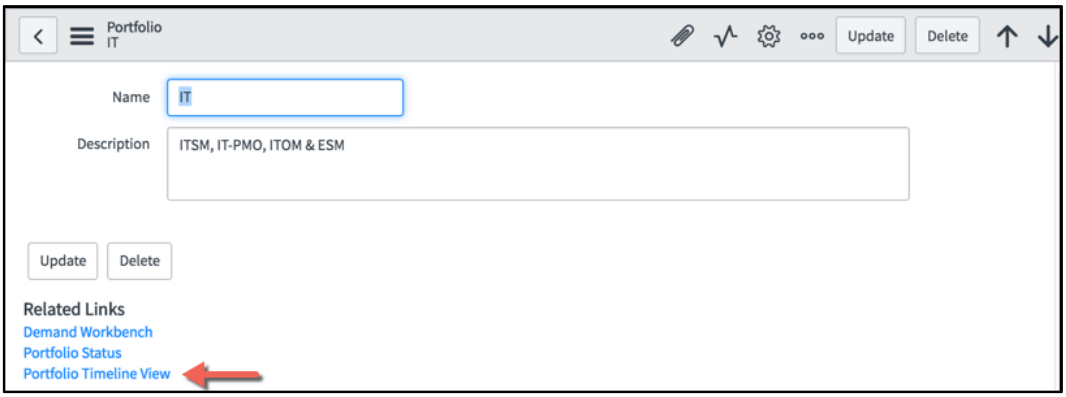


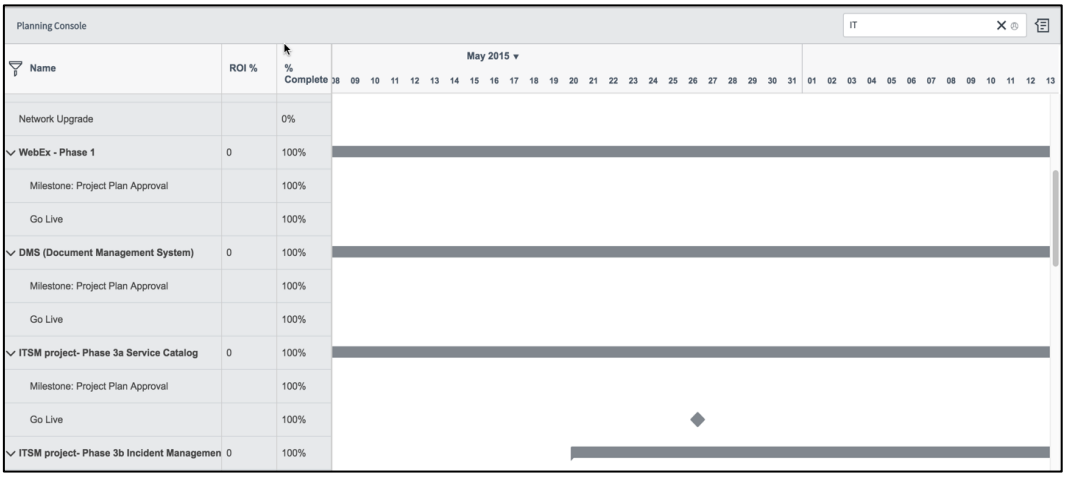




9. Click the browser **back button** to return to the IT Portfolio.

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10. Click **Portfolio Timeline View** to open a new tab with the Portfolio Planning console.




11. Close the **Portfolio Timeline View** tab.

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# Lab Goal

This lab familiarizes you with the Ideation Module and Collaboration.

**Lab 2.0**
**Ideation and Collaboration**

## Ideation Overview

With the ideation module, business users can create and submit ideas. The demand manager evaluates the submitted ideas and promotes accepted ideas to demands. This module also tracks the progress of an idea as it moves through the different stages of the lifecycle, from idea to demand to project and actualization. Ideation is integrated with the Demand application.

## Submit Ideas

All users can submit ideas through the Service Catalog. Demand users can submit ideas through the Self-Service menu.

The system creates a new idea, assigns a unique number, and adds it to the Ideas list. The new idea is created in the Submitted state.

**Note**: After an idea is submitted, it cannot be modified without the Admin Role.

## View Ideas

Users can view their own submitted ideas in the Service Catalog by navigating to **Self-Service > Ideas > My Ideas**. Users can view all submitted ideas by navigating to **Self-Service > Ideas > All**. Ideas are displayed on the Ideas list, which includes the following four columns:

- **Idea:** Initially displays both the title of an idea and the idea number. Idea is a composite field, with the idea number providing a link to the Idea form.
- **Stage:** Displays the current stage of an idea as it moves through the lifecycle. Pointing to this field opens a pop-up window that shows the progression from idea to demand to actualization.
- **Submitted by**: Displays the name of the user who submitted the idea.
- **Demand**: Displays the demand name and number after an idea has been accepted and promoted to a demand. Clicking the demand number in this composite field opens the Demand form.

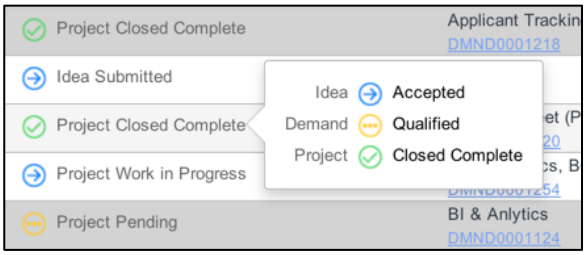
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## Stage Fields

The **Stage** field, on the **Ideas list**, displays the current state of an idea as it moves through the demand lifecycle, from an idea to a demand and then to the resulting project, enhancement, change, or defect. The result of an idea depends on the initial settings in the Category and Type fields on the Demand form. The Stage field also appears on the **Demands list**. The Stage field is a display only field and cannot be searched or sorted.

A new idea is created in the Submitted state. An accepted idea is updated to the Accepted state and a deferred idea is updated to the Skipped state. When a demand is closed, the associated idea is marked as **Complete**.

Pointing to the **Stage** field displays a pop-up window that shows the progression of the idea along with the value of the **State** field for each step in the progression.



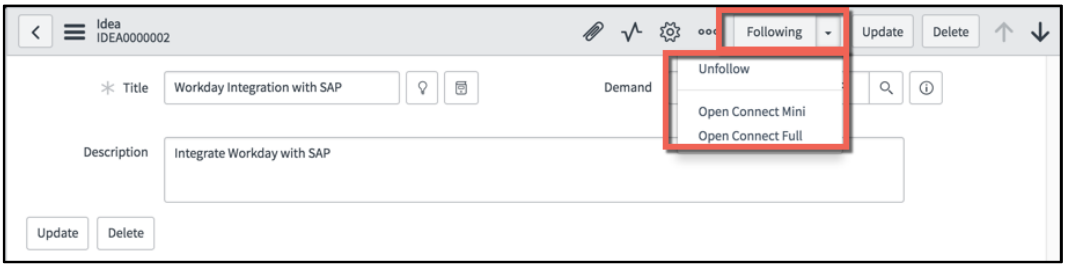

- **Idea**: If an idea is being evaluated, the pop-up window displays the current state of the idea.
- **Demand**: If an idea is promoted to a demand, the pop-up window displays the current state of the demand as well as the idea.
- **Project, Enhancement, Change, or Defect**: If a demand is accepted, the pop-up window displays the current state of the resulting project, enhancement, change, or defect in addition to the demand and idea.

## Collaborate on Ideas

Users can use the activity stream, Live Feed, or Connect to discuss ideas and exchange information.

- On the Ideas list header, click the list activity stream icon  to display the activity stream for the records currently displayed in the list.
- On the Idea form header, right-click and select **Show Live Feed** to display the live feed information specific to this record.
- On the Idea form header, click the **Follow** button to follow the record or open Connect to start a chat conversation specific to this idea. Once you **Follow** a record, you have a choice to **Open Connect Mini** opens the mini Connect window or **Open Connect Full** opens a full Connect window in a new tab.

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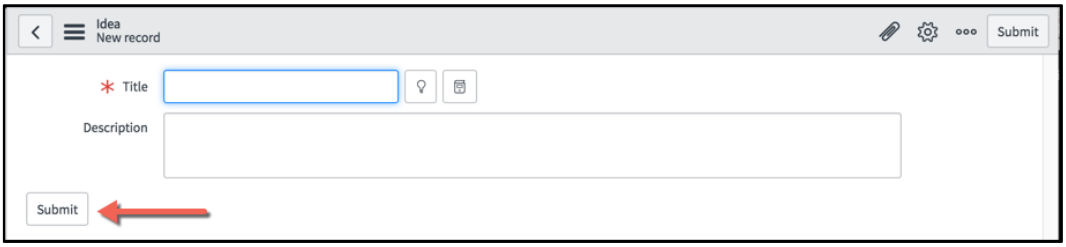



## Submit a New Idea

1. Navigate to **Self-Service > Ideas > Create New**.




2. Give your idea a **Title** and **Description**, and then click **Submit**.

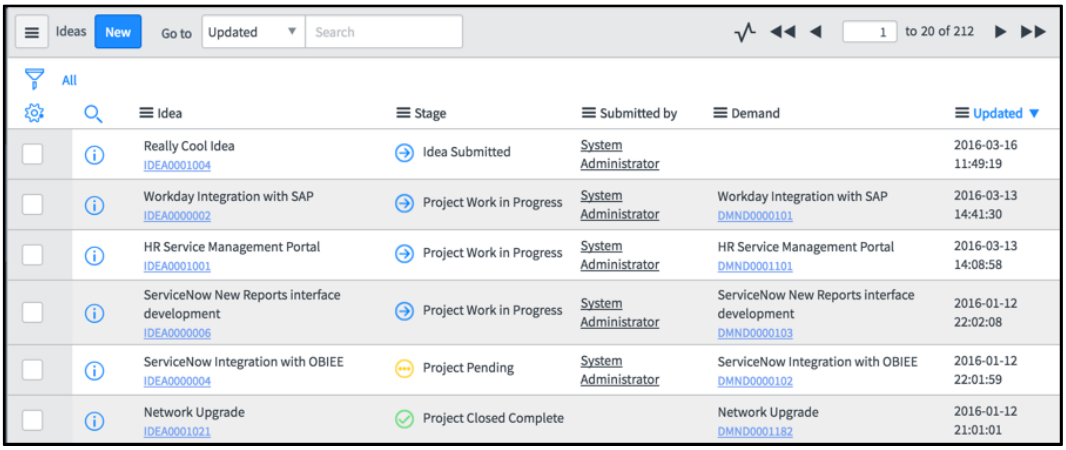



3. Navigate to **Self-Service > Ideas > All**.




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4. You are directed to the following screen.

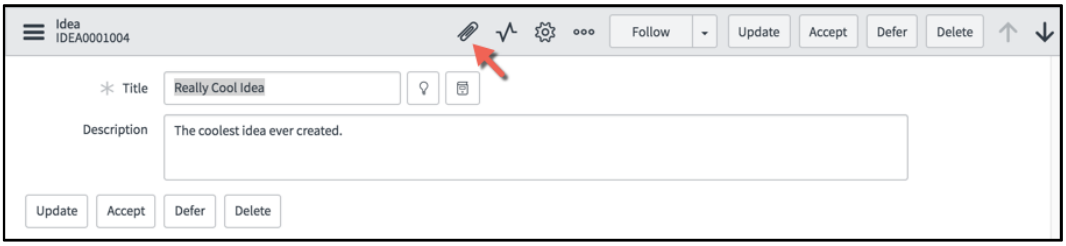



5. On the **Ideas list**, find the Idea you just created and click the **Idea Number** to open it.



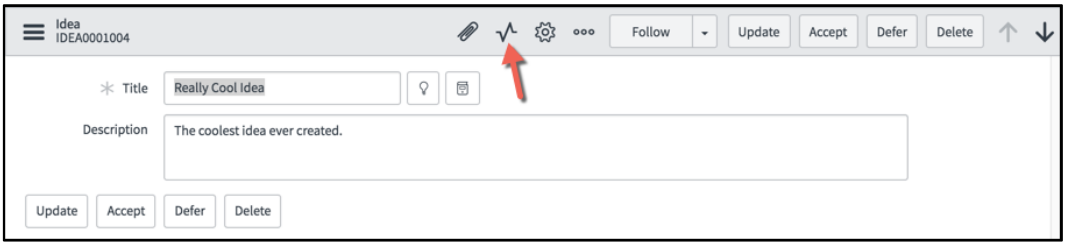

6. Notice the additional actions that are now available on the form.

7. **Manage Attachments** allows you to Add and Remove attachments to the Idea.



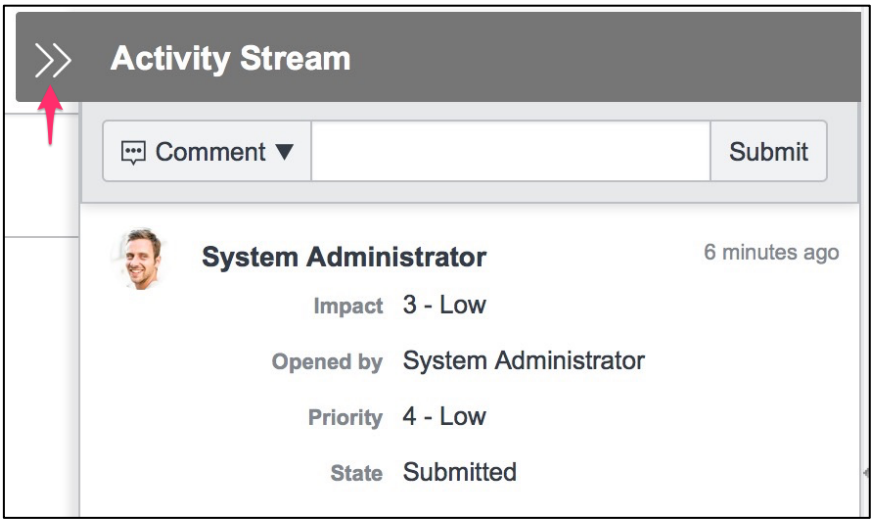

8. **Show Activity Stream** opens the activity stream for this idea.

9. Click the **Show Activity Steam** icon.

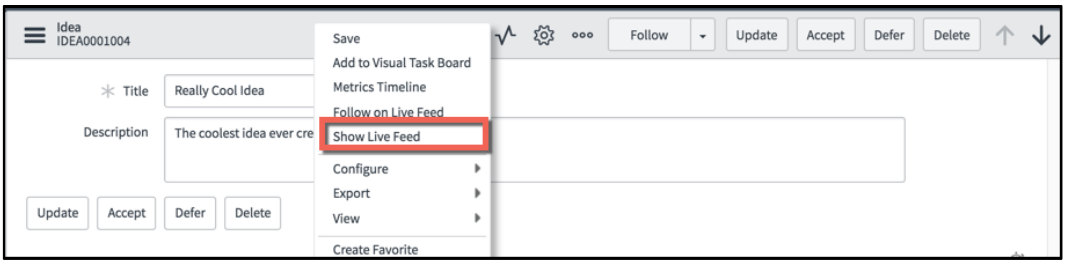



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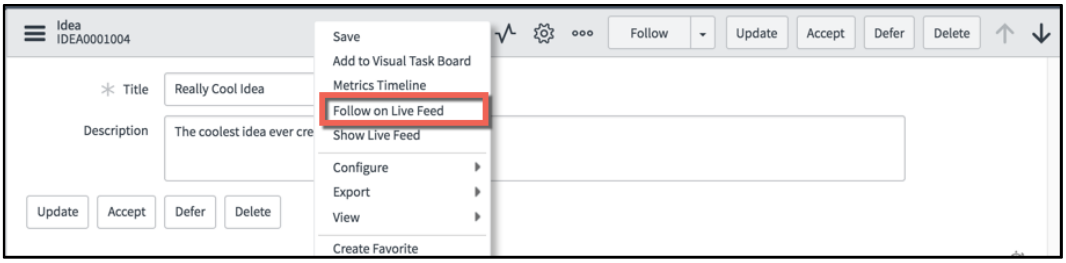
10. Click the **>>** to close the Activity Stream.




11. Right-click in the header and select **Show Live Feed** to view the Live Feed for this idea. Click the Close icon to exit the Live Feed window.

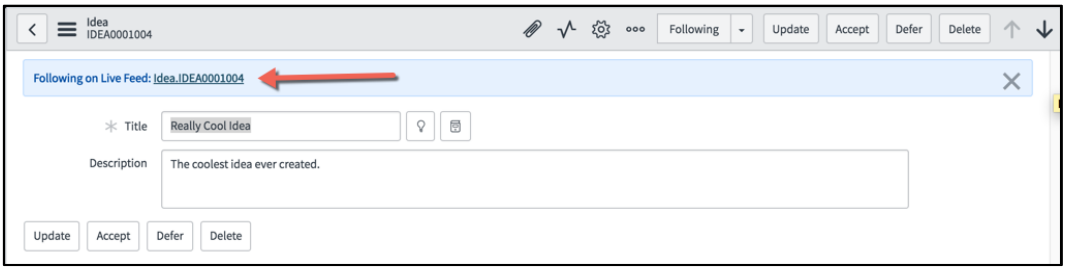



12. Right-click in the record header and click **Follow on Live Feed** to follow this record on Live Feed.

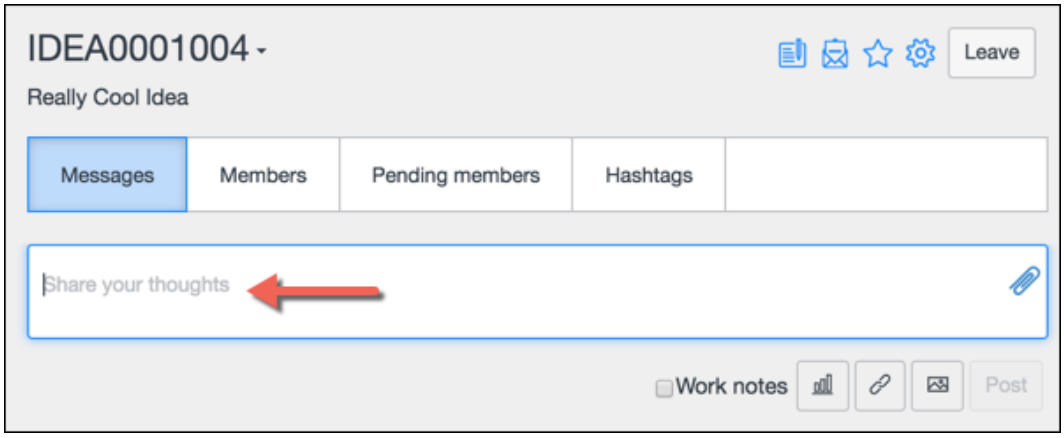



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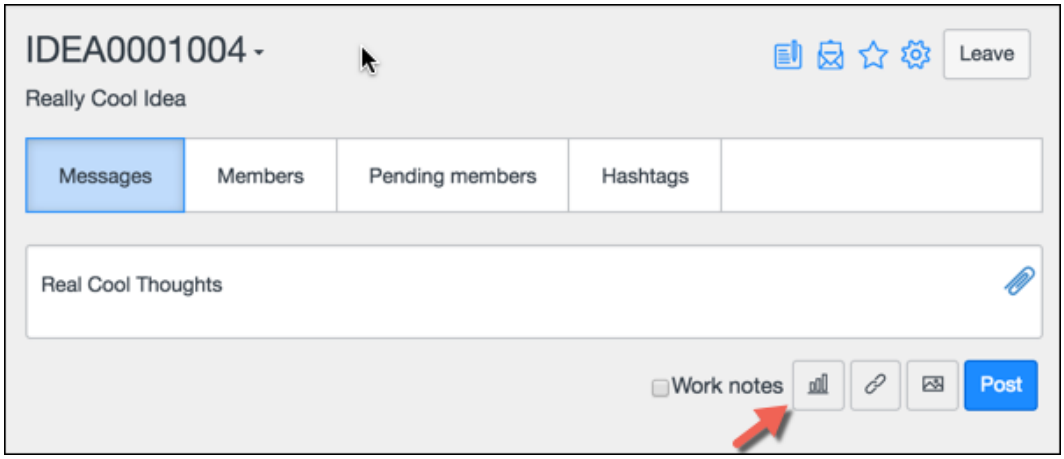
13. Click the hyperlink to the idea number generated (i.e. Idea.IDEA#######) to be taken to the Live Feed for the idea record.




14. Click in the **Share your thoughts** field.

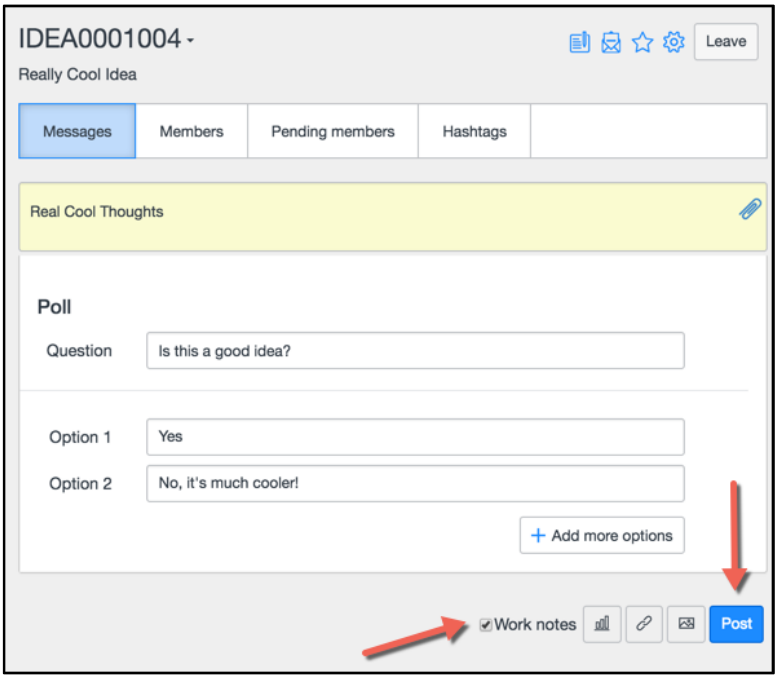



15. Enter some really cool thoughts in the field and then click the **Create Poll** icon.




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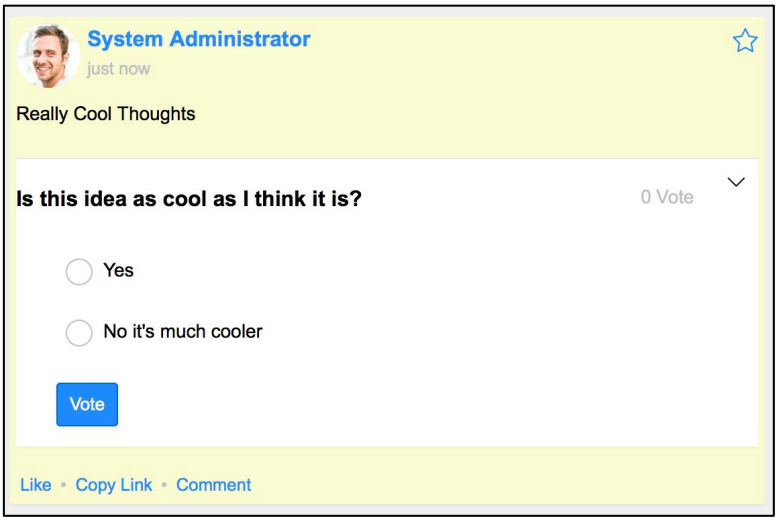
16. Provide the following:
    - Poll Question: **Is this a good idea?**
    - Provide at least two responses
        - Option 1: **Yes**
        - Option 2: **No, it's much cooler**
    - Work notes: **Checked**




17. Click **Post**.

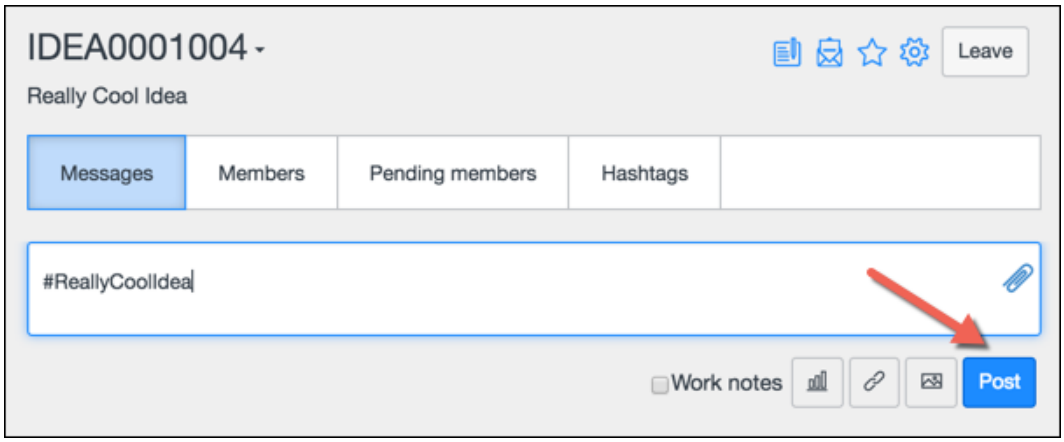
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18. Your new **Poll** has been posted to **Live Feed**.



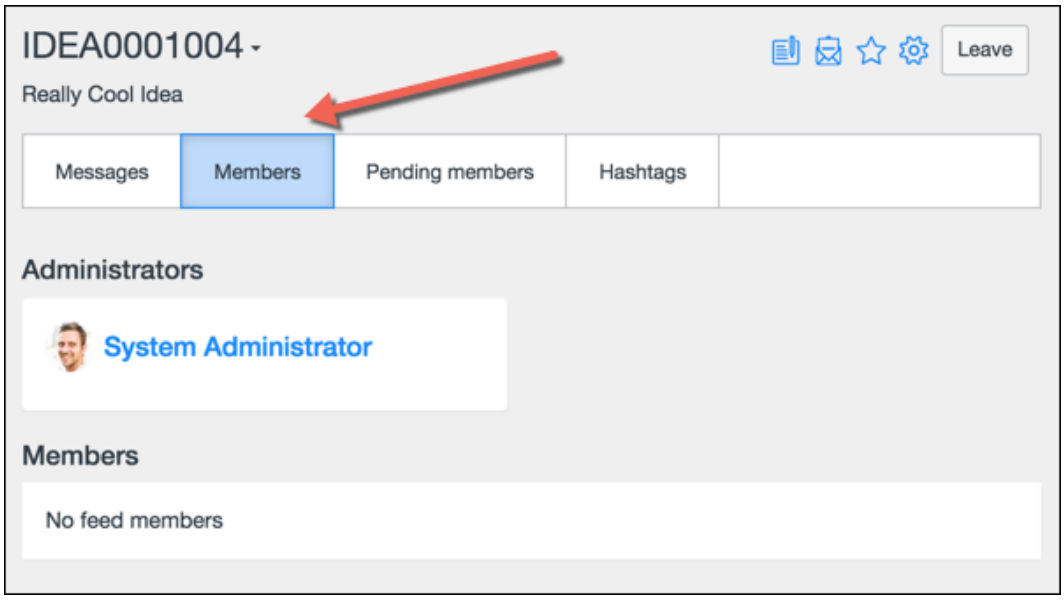

19. You could vote on your poll if you wanted to, but that is a lot like "liking your own Facebook post."

20. Add a #HashTag to **Share** your thoughts. For instance **#ReallyCoolIdea**, then click **Post**.

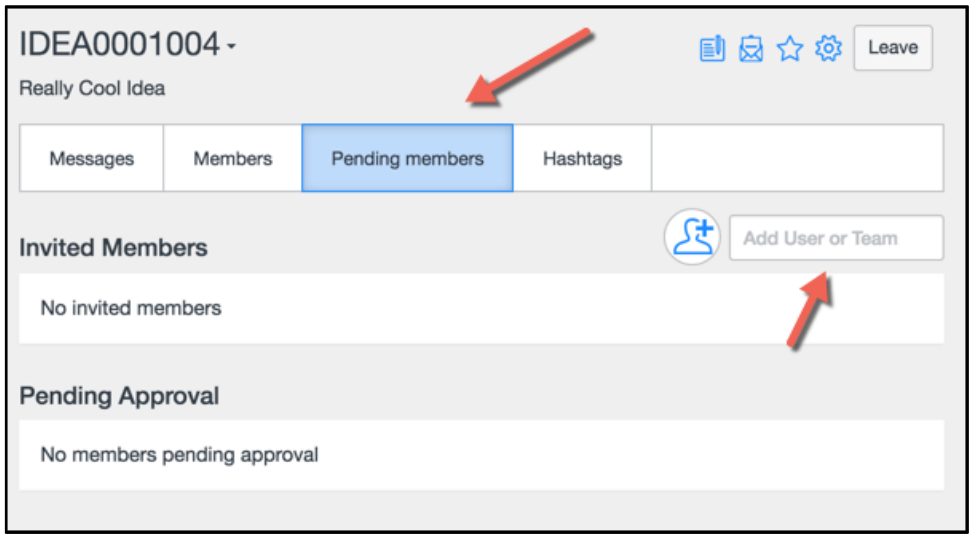



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21. Click **Members**. You are now a member. A note indicates that there are no feed members.

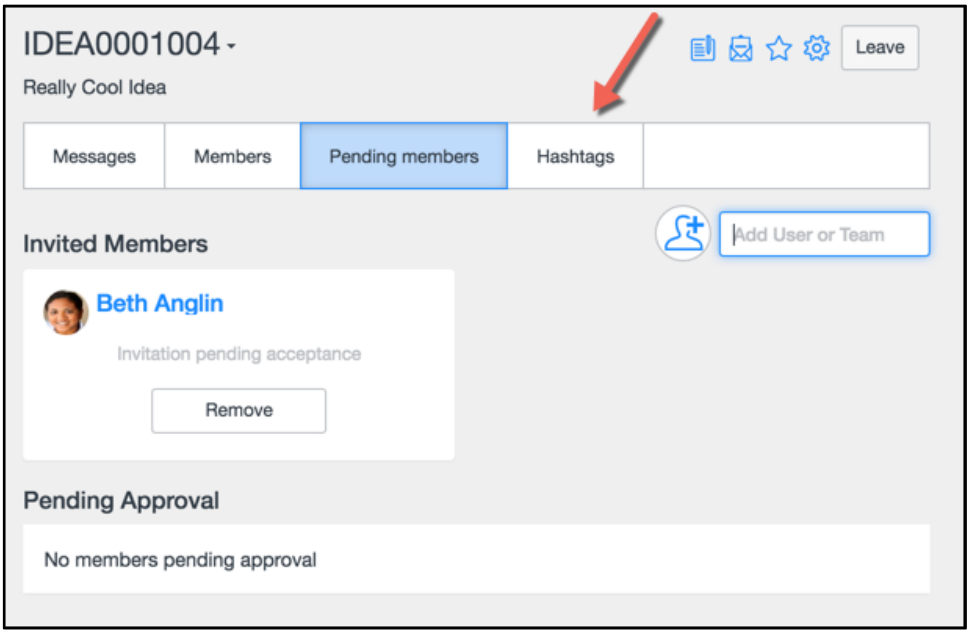



22. Click **Pending Members**.



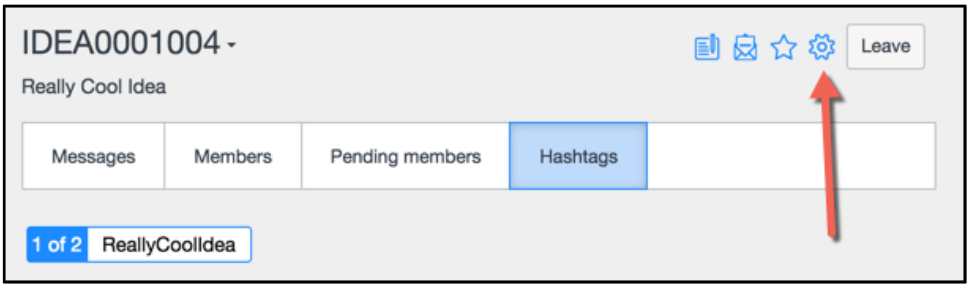

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23. In the **Add User or Team** field type **Beth Anglin**. She is invited to the Live Feed group.



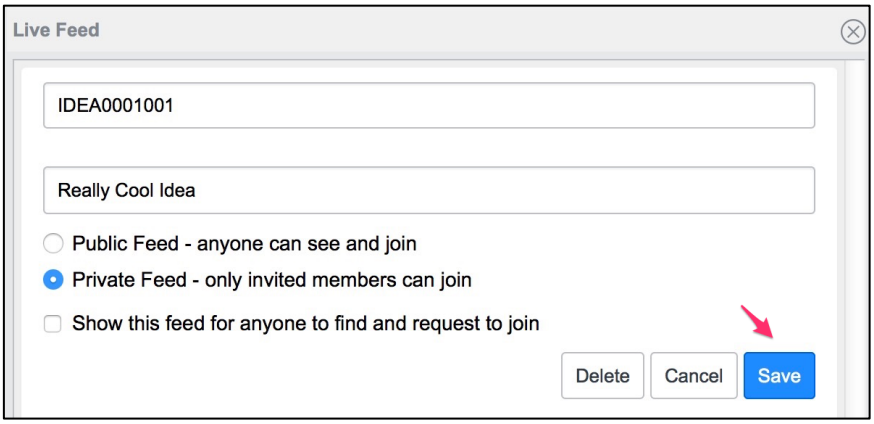

24. Click **Hashtags**. Note the hashtag you entered.

25. Click the **Gear** icon.




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26. You can make your feed **public**, **private**, or allow **anyone** to find and join it.




27. Click **Save**.

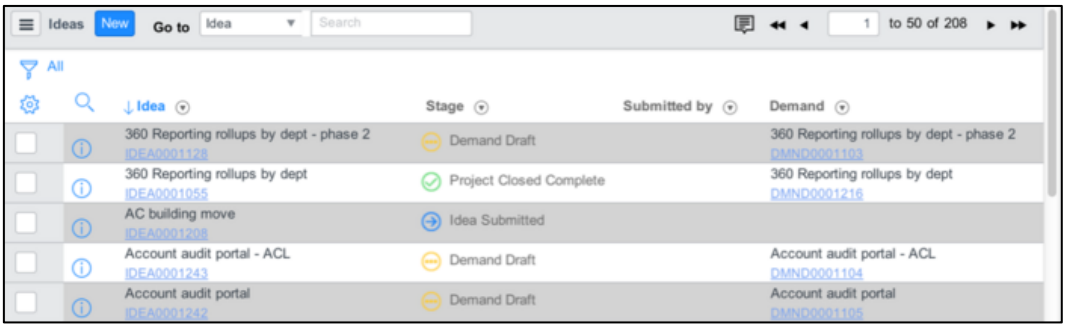
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## Evaluate Ideas

The demand manager can evaluate an idea and then decide whether to accept the idea, defer it, or delete it from the Ideas list.

1. If you no longer have your **Idea** open, navigate to **Self-Service > Ideas > All**.

2. Notice the list of **Ideas**.




3. Find the Idea you just created on the **Ideas list** and click the **Idea Number** to open it.




4. Click one of the following buttons: (**Note**: In this lab, we accept the idea.)

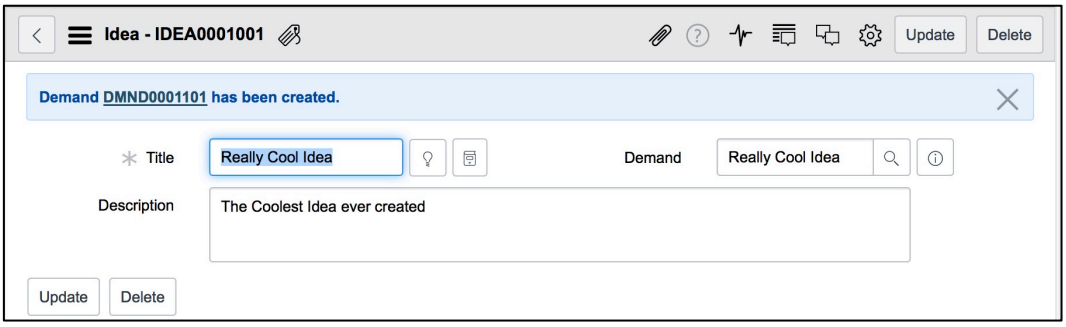
   - **Update**: Saves any changes made to the idea form.
   - **Accept**: Changes the idea state to **Accepted** and creates the associated demand record.
   - **Defer**: Defers the idea and changes the idea state to **Skipped**.
   - **Delete**: Removes the idea from the Ideas list.

5. Click **Accept** to promote the idea to a **Demand**.




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6. After you accept the idea, the following screen appears. This concludes the lab. Leave your screen open because the next labs picks up at this point.




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# Lab Goal

This lab familiarizes you with the Demand Management application.

**Lab 3.0 Demand Management**

## Overview

Users can create, view, and modify demands using the Demand Management application if they have the demand manager role. Users can also approve demands and create the following artifacts from the approved demands:

- Project
- Change
- Enhancement
- Defect

The type of artifact created from a demand depends on the selections in the **Category** and **Type** fields on the Demand form. Enhancements and defects can be created if the system administrator has activated the SDLC-SCRUM plugin.

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## Create Demands

The demand manager can create a demand from the demand workbench. Demands created from the workbench are created in a qualified state.

The demand manager and the demand user can create a demand from the Demand application.

## View Demands

The demand manager can view demands from the application or the Demand Workbench.

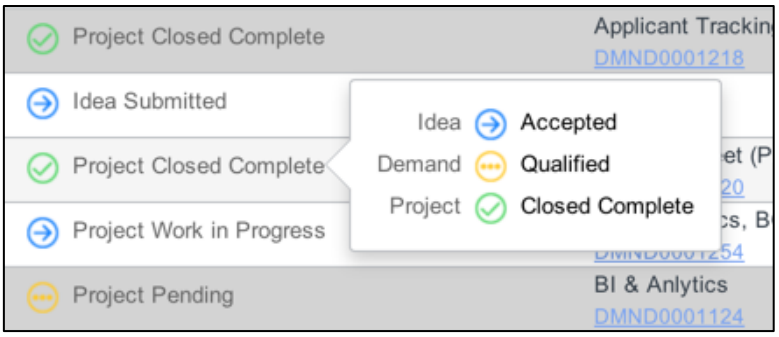
The demand user can view demands from the application.

The **Demand** field on the Demands list is a composite field that combines the demand name and number. The demand number provides a link to the Demand form.

The **Stage** field displays the status or progress of a demand and is updated as the demand moves through the lifecycle, from an **idea** to a **demand** to the resulting **project**, **enhancement**, **change**, or **defect**. At a glance, users can use this field to track the progress of a demand. For more information, see Stage Fields.

Pointing to the **Stage** field on the Demands list displays a pop-up window that shows the progression of the idea along with the value of the **State** field for each step in the progression:

- **Idea:** If an idea is being evaluated, the pop-up window displays the current state of the idea.
- **Demand:** If an idea is promoted to a demand, the pop-up window displays the current state of the demand as well as the idea.
- **Project**, **Enhancement**, **Change**, or **Defect:** If a demand is accepted, the pop-up window displays the current state of the resulting artifact in addition to the demand and idea.




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## Demand Management Lifecycle

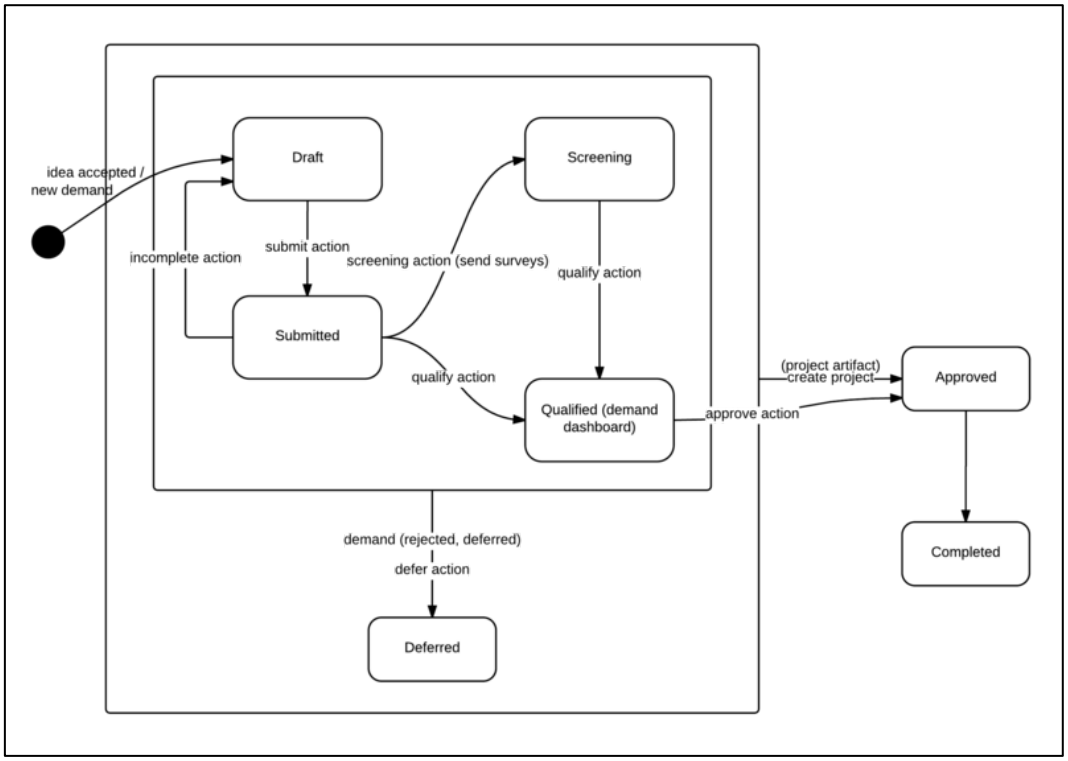
The demand management lifecycle can be simplified as follows:

- **Create a demand:**
  - The user submits an idea and the demand manager approves the idea, automatically creating a demand from that idea.
- **View a list of demands:**
  - The demand manager views demands on the demand workbench or from a list view.
- **Enhance a demand:**
  - The demand manager can send the demand to screening, which sends assessments to stakeholders.
- **Assess a demand:**
  - The demand manager can screen the demand and send surveys to stakeholders to complete assessments.
  - The demand manager can set the state of the demand to qualify, defer, or incomplete.
  - Demands can be analyzed and approved using the demand workbench.
- **Create an artifact:**
  - The demand manager creates a project, enhancement, change or defect.

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## Demand States

Demands can only be in one of the states denoted in the following diagram.




These states appear in the process flow indicator at the top of the Demand form. The process flow indicator:

- Highlights the current state of the demand.
- Checks off the states that a demand has passed through.
- Leaves blank the states that have been skipped.

In this example, the demand is currently in the **Approved** state. It passed through the **Draft**, **Submitted**, and **Qualified** states, but skipped the **Screening** state.




## Demand Management (Continued from the Previous Lab)

1. After you accept the idea, the **Demand Number** (i.e. DMND#####) message appears.

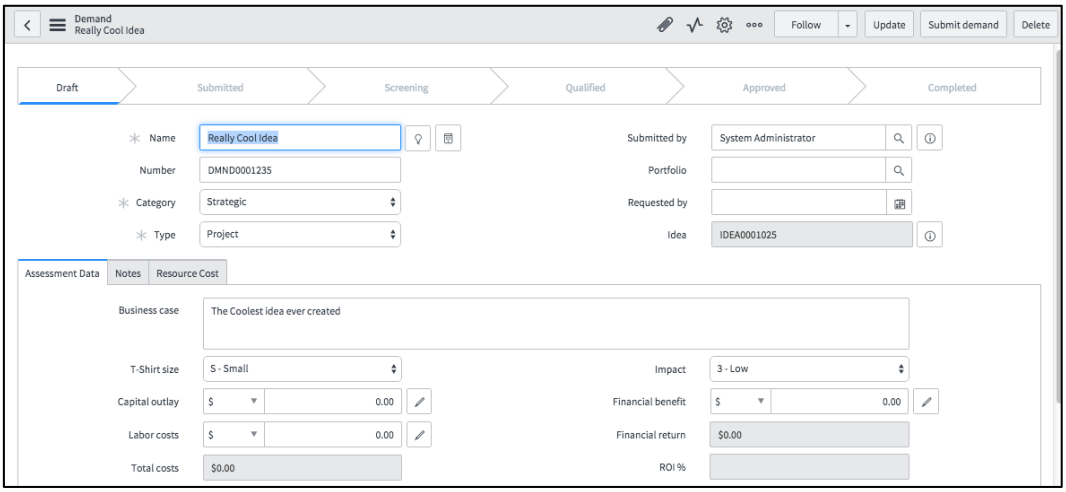
2. Click the **Demand Number** to be directed to the newly created **Demand**.

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3. If you left this screen, navigate to **Demand > Demands > All** and find the **Demand** you created in the list. The Demand will have the same name as the Idea you created (Really Cool Idea).




The **Demand** you created should look something like the image below. The Demand Process has begun and you can continue by applying a template or completing the required steps before submitting the demand for review.




## Submit Demand

The demand manager typically works with a business relationship manager to identify stakeholders and elicit requirements, risks, and other important information. The Demand Management application streamlines the stakeholder identification process by auto-populating the list of stakeholders based on the portfolio the user selects when filling out the demand form in the service catalog or in the Demand Management application. The Demand Management application also allows you to use assessments to automate some of the information gathering process.

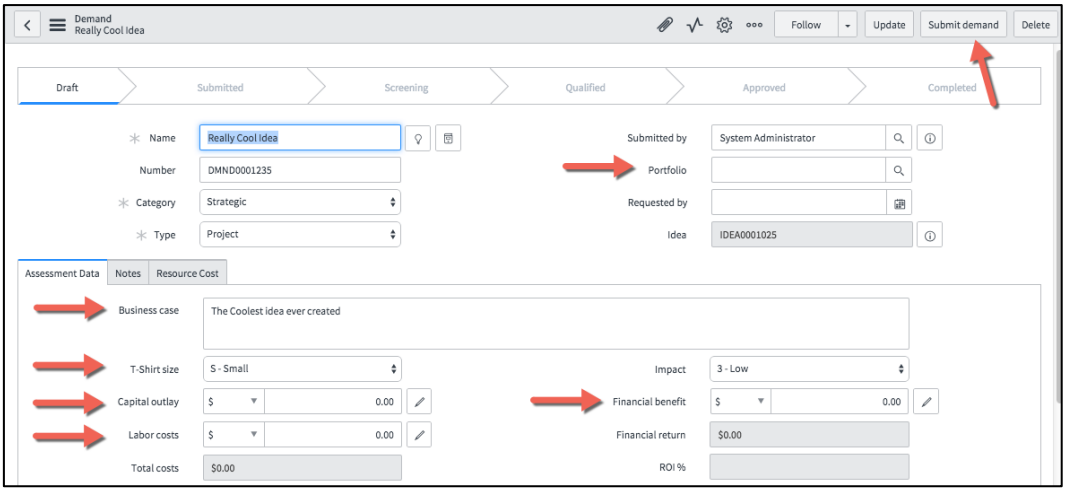
Note that the demand is currently in a Draft state. There are a number of elements that should be completed before submitting the demand. The fields that should be completed at this stage are denoted on the screenshot below.

The Category and Type of the demand will determine what takes place after the demand process completes. For this lab, leave them as Strategic and Project, respectively.

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4. For **Portfolio** select **IT**.

5. Provide the following on the **Assessment Data** tab:
   - **Business Case**
   - **T-Shirt Size**
     - This is a natural language approach to provide an overall estimate for the demand.
   - **Capital Outlay** estimate
   - **Labor Costs** estimate
   - **Financial Benefit** estimate




6. Click **Submit Demand** and note the state changes to **Submitted**.




## Enhance Demands

## Stakeholders

Stakeholders are users with specific product or service knowledge associated to a portfolio. They are generally familiar with the metrics and processes and are typically a subject matter expert or someone with specific responsibilities related to a portfolio.

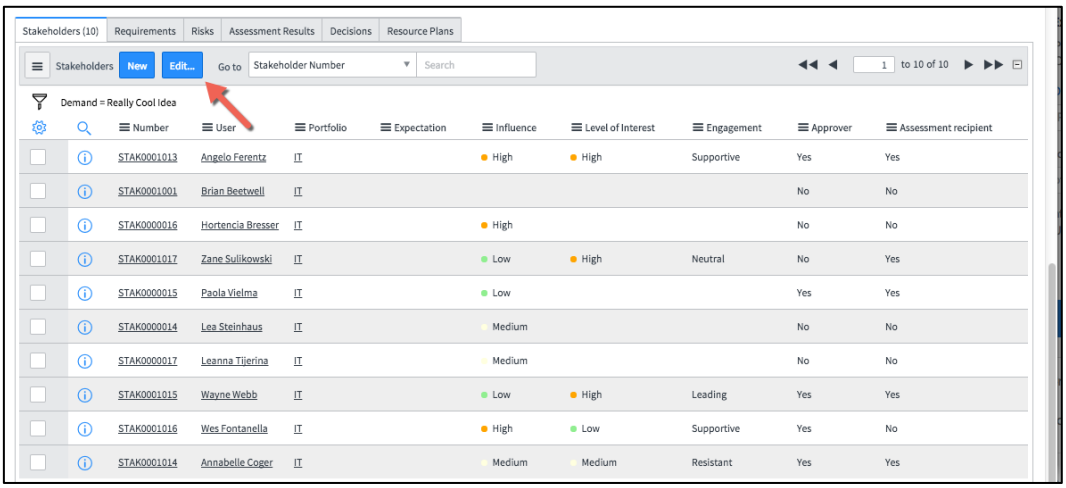
In a production environment, when a demand is submitted, the demand stakeholder list is populated automatically from the associated portfolio. You can add additional stakeholders if needed.

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1. Scroll to **Related Lists** and find the **Stakeholders** tab.

2. Click **Edit**.

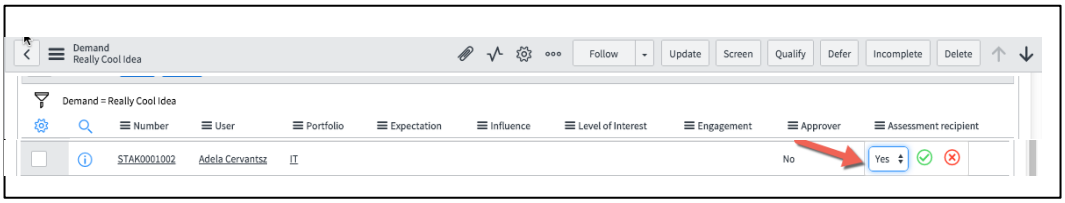
3. Choose a new stakeholder, **Adela Cervantsz,** from the left list to add to the right. Click **Save**.




A demand can have multiple stakeholders, and a stakeholder can be associated with multiple demands.

**Note**: Some stakeholders have differing levels of interest and roles related to the demand.

4. Give your new stakeholder, Adela Cervantsz rights as an assessment recipient by toggling the associated field from “no” to “yes” (double click to activate).




## Requirements

Demand managers can create as many requirements as needed but requirements are not mandatory. Typically, the stakeholders associated with a demand request should have input into what the requirements are for a demand request to be completed.

Demand managers can use the Requirement form to describe the requirement and assign an owner who is responsible for making sure the requirement is met. If a requirement is especially complex, demand managers can associate planned tasks, such as project tasks, with the requirement, and assign and track those tasks until they are complete.

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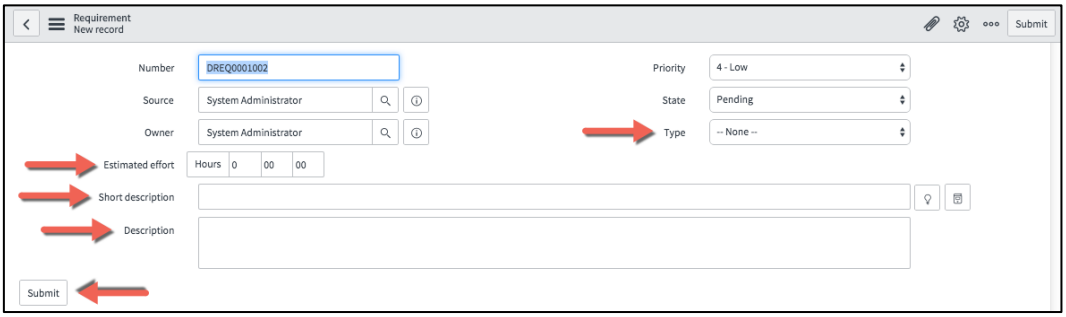
1. Scroll to **Related Lists** and select the **Requirements** tab.

2. Click **New**.




3. Provide the following:

   - **Estimated Effort**
   - **Short Description**
   - **Detailed Description**
   - **Type**
     - The Type of requirement can be Business, Solution (Functional), Solution (Non-Functional), Quality, Stakeholder, or Transition.




4. Click **Submit**.

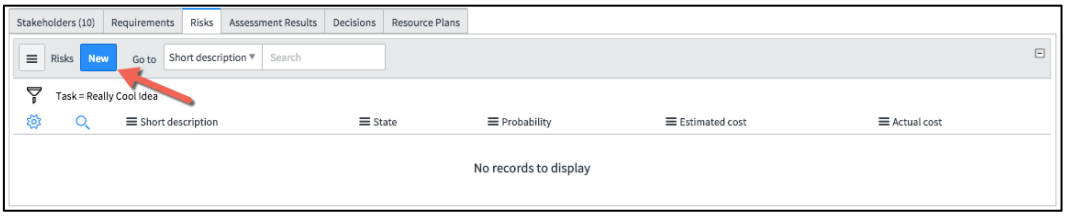
## Risks

Risks are any uncertain events that can potentially impact the success or outcome of a project. For example, schedule slippage is a risk, even if incorrect estimating causes it. Another example of a risk is a change in project requirements. It is important to record risks so decision makers have all the relevant information when assessing a demand.

1. Scroll to **Related Lists** and select the **Risks** tab.

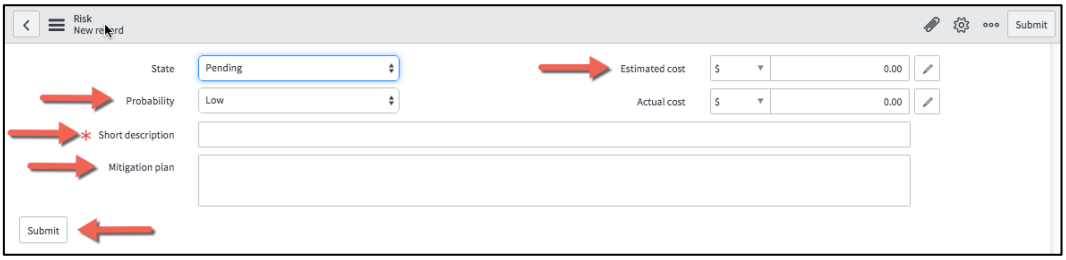
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2. Click **New**.




3. Provide the following:

- **Probability**
  - The likelihood that the event described by the risk will occur during the course of the project.
- **Short description**
- **Mitigation plan**
- **Estimated cost**



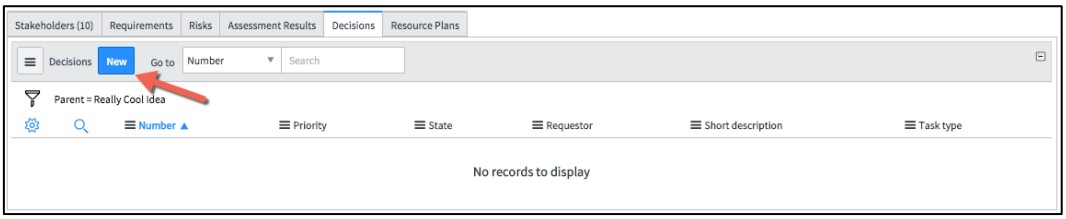

4. Click **Submit**.

## Decisions

Decisions provide a means to capture key decisions that will need to be made during the demand process. For instance a Go / No Go might take place after key actions have been completed. Decisions may or may not require an approval before they can be completed.

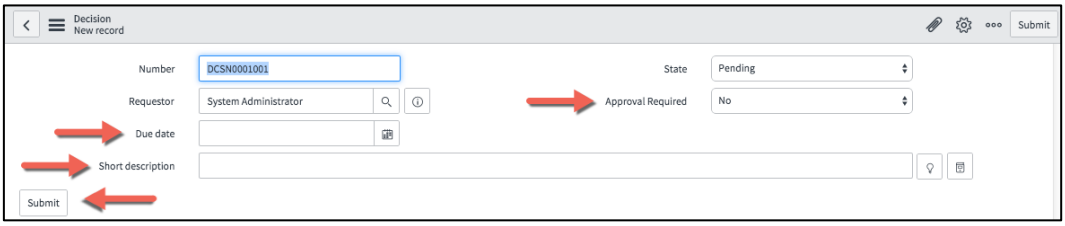
1. Scroll to **Related Lists** and select the **Decisions** tab.

2. Click **New**.




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3. Provide the following:
   - **Due date**
   - **Approval Required**
   - **Short description**




4. Click **Submit**.

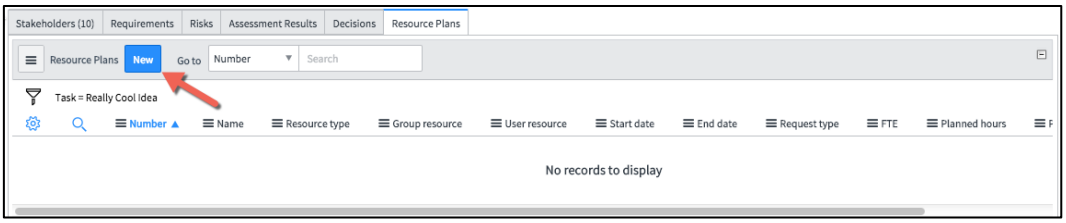
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## Resource Plans

Resource plans are another source of information that decision makers can use when evaluating demands. You can create resource plans for a demand from the Resource Plan related list, which appears only if the Resource Management application is activated.

1. Scroll to **Related Lists** and select the **Resource Plans** tab.

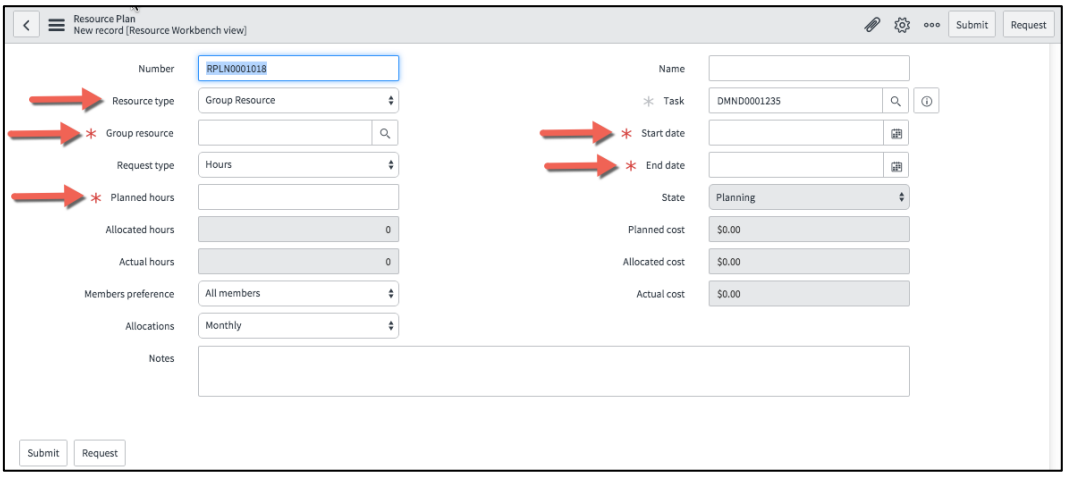
2. Click **New**.




3. Provide the following:

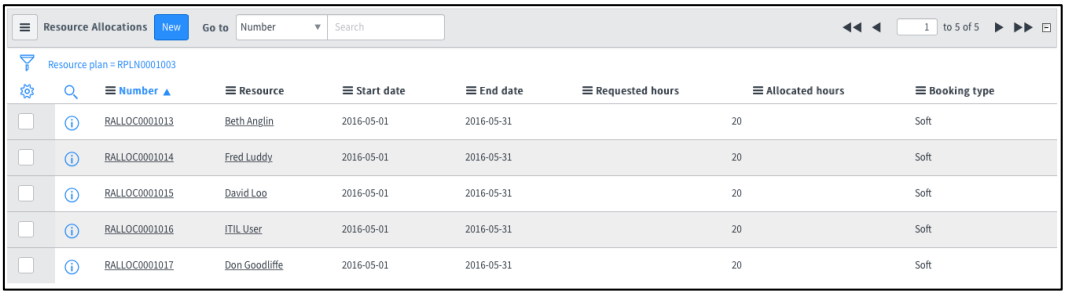
   - Resource Type: **Group Resource**
   - Group Resource: **Software**
   - Planned Hours: **100**
   - Start Date: Make something up.
   - End Date: Make something up

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




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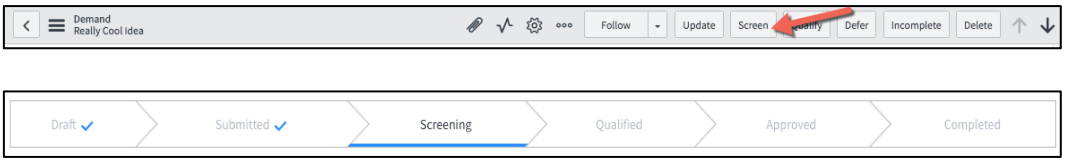
5. After the record has saved/refreshed, scroll down to **Resource Allocations**. Here you can see the planned hours requested for the members of the Software Group




6. Click **Update**. You are redirected to your demand.

   **Note**: This is the extent of the Resource Management material 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 documentation site for Resource Management here:
   https://docs.servicenow.com/bundle/geneva-release-notes/page/product/resource_management/concept/c_ResourceManagement.html

7. On the top of the demand form, click the **Screen** button. Note the state changes to **Screening**.




8. Now that our Demand record has entered the Screening phase, we will learn how to perform Assessments of the Demand content in the next lab exercise.

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# Lab Goal

This lab familiarizes you with Demand Assessment.

**Lab 4.0**
**Demand Assessment**

## Qualify Demands

When a demand is qualified, the assessment values are copied to the demand record and become the demand score values:

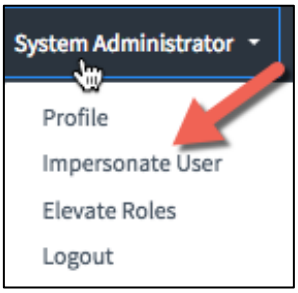
- **Size:** Assessment score size
- **ROI:** Assessment score value
- **Risk:** Assessment score risk
- **Strategic alignment:** Assessment score strategic alignment
- **Cost:** Assessment score cost

These values can be updated from the demand workbench bubble chart or from the demand form. Additional metrics can be added to meet specific customer needs.

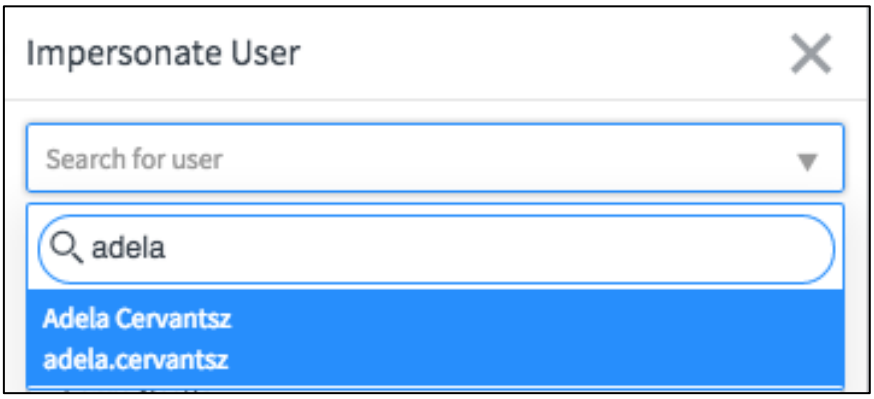
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## Assess Demand

1. At the top right of the screen click **System Administrator**. Click **Impersonate User**.

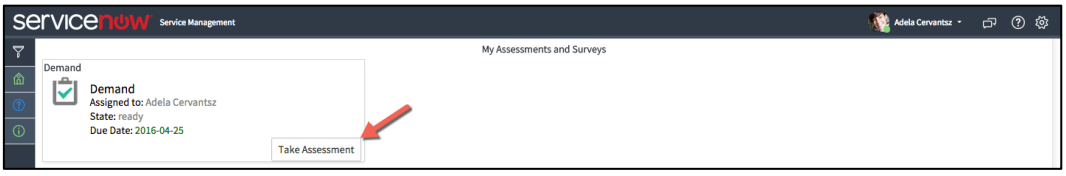



2. Impersonate User **Adela Cervantsz** (**Note**: this is the stakeholder you added in a previous step).



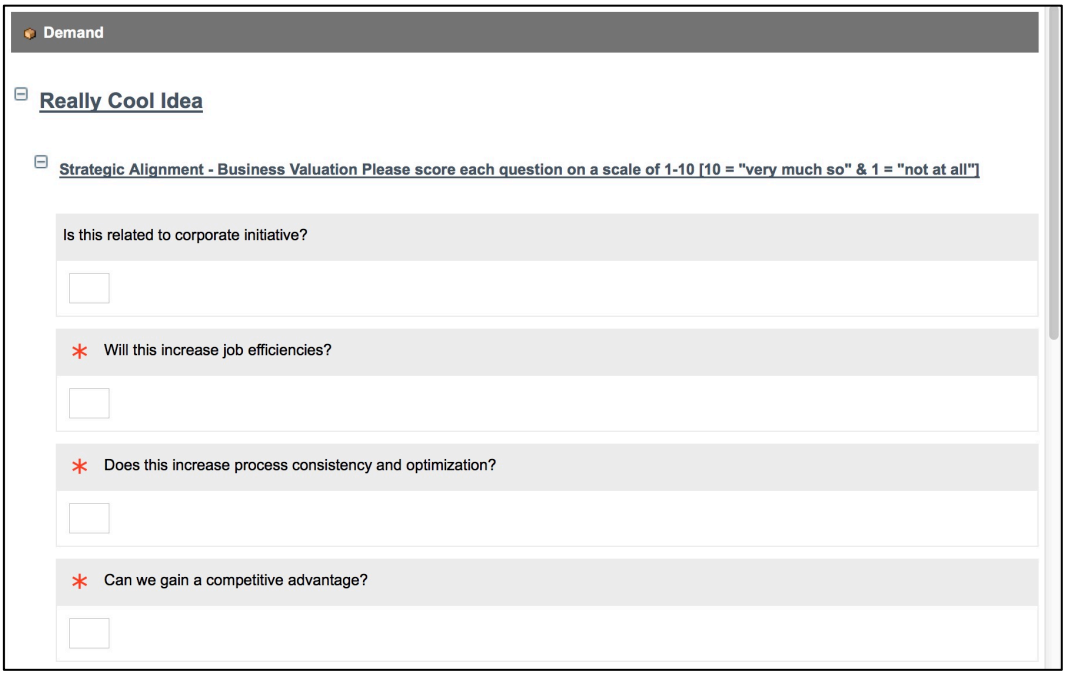

3. Navigate to **Self-Service > My Assessments and Surveys**.

4. Find the Assessment referencing the Demand you created and click **Take Assessment**.

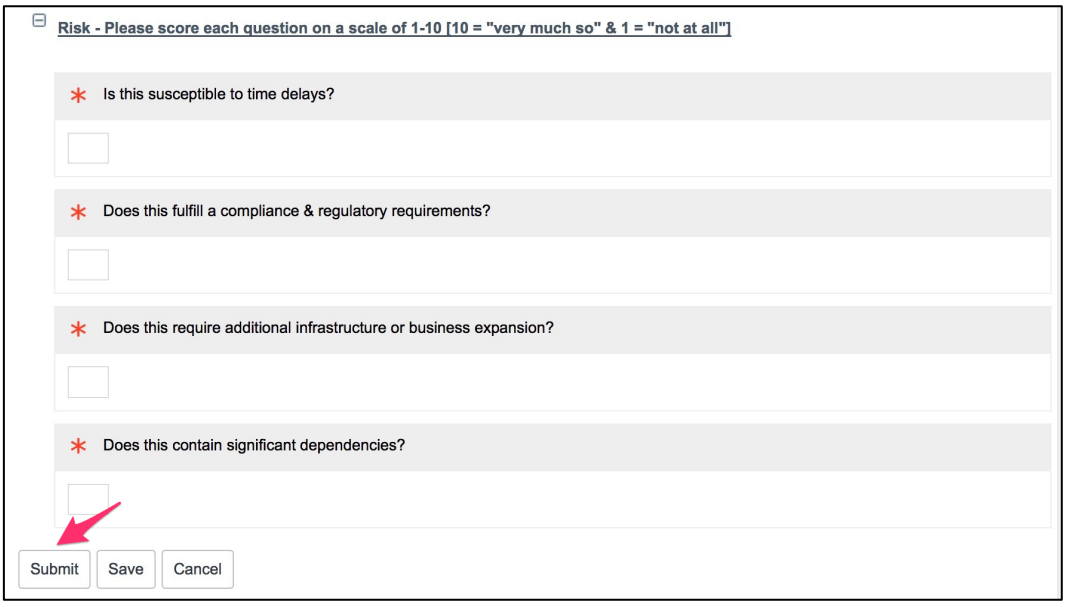



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5. Follow the instructions and **Complete the Assessment**. Be creative.



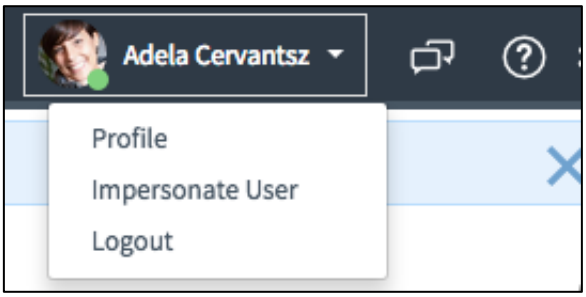

6. After you have responded to each of the questions, click **Submit**.



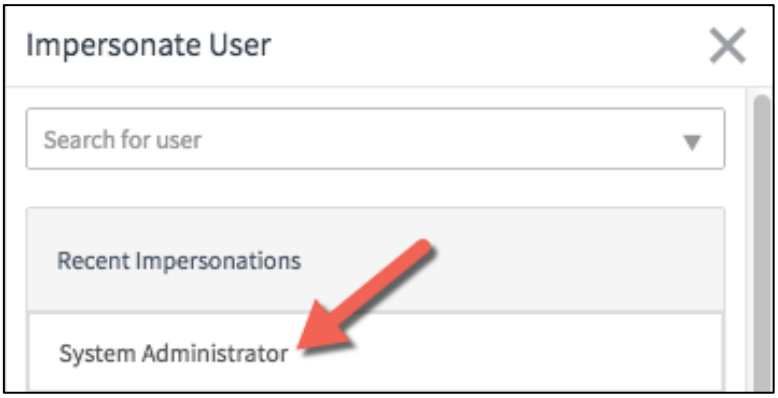

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## Qualify and Approve Demand

1. At the top right of the screen click **Adela Cervantsz**. Select **Impersonate User**.

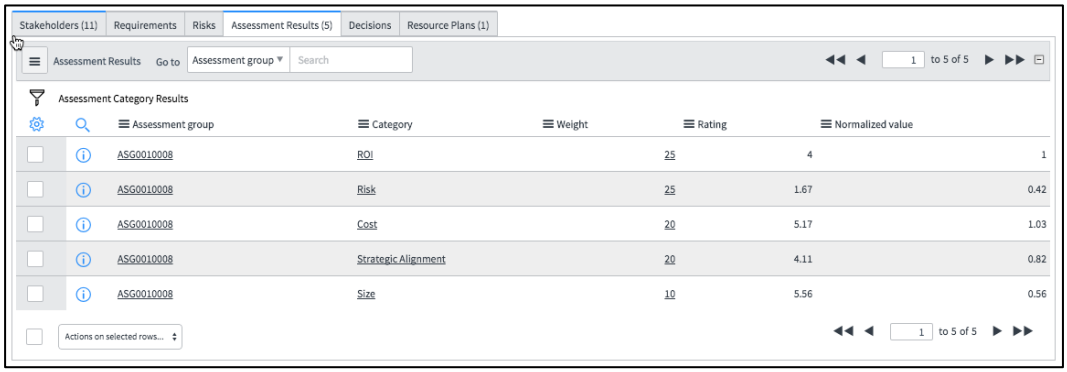



2. Search for user **System Administrator**.




3. Navigate to **Demand > Demands > All**, find your Demand and open it.

4. After your demand opens, scroll to Related Lists and click the **Assessment Results** tab.




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5. The normalized value is aggregated for all responses to provide the values that are used to evaluate the appropriate metrics (e.g., Risk, Cost, Size). The Strategic Alignment and Risk values are calculated based upon the assessment response you just provided on behalf of Adela Cervantsz.

6. Click **Qualify** on the top of the Demand. This moves the demand into the next phase of the process.




Under normal circumstances this demand would be ready for Peer Review. For this lab, we approve the demand and see what happens.

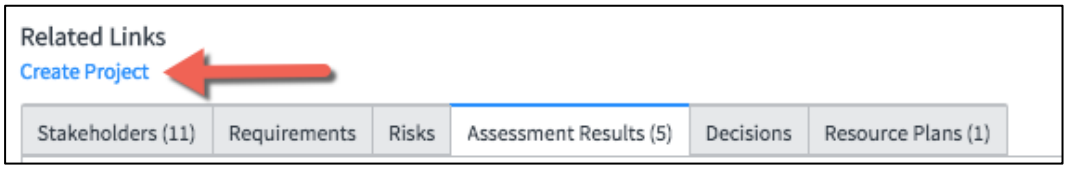
7. Click **Approve** on the top of the Demand. It is helpful to raise one eyebrow when clicking on approve.



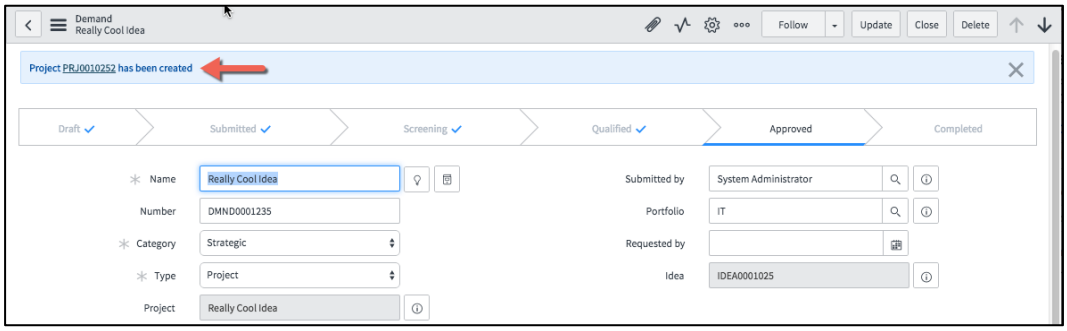

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## Create a Project

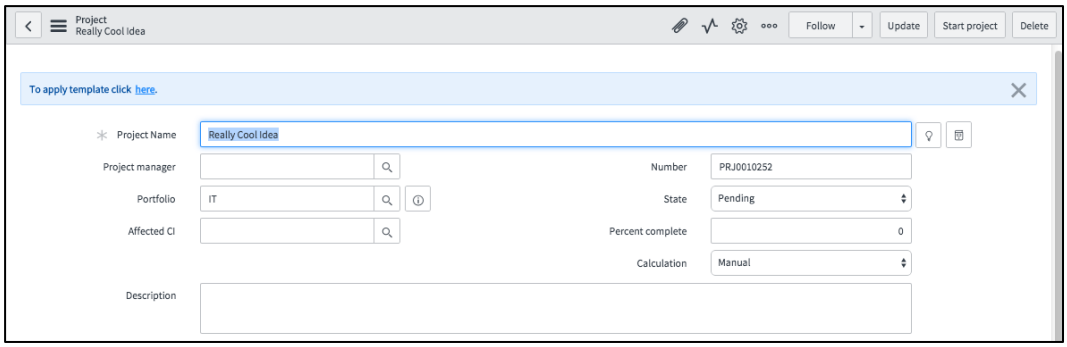
1. After the Demand has been approved, scroll to Related Links and click **Create Project**.




2. After the Project is created, the screen updates with the Project ID. Click the **Project Number** in the message (i.e. PRJ#####).




3. The example below shows that the Project has been created. Spend a moment looking through the project. Notice that a few things have come over from the demand, for instance the **Resource Plan**.




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# Lab Goal

Become familiar with the Demand Workbench and Roadmap.

**Lab 5.0 Demand Workbench and Roadmap**

## Demand Visualization

The Demand Management application comes with two demand visualization tools: the Demand Workbench and the Demand Roadmap. The Demand Workbench provides a single point of engagement for assessing and approving demands and creating projects, enhancements, changes, or defects. This page combines multiple views of demand information, including an interactive bubble chart and a detail area that displays the list of current demands. The Demand Roadmap is a visual representation of an organization's demands over time.

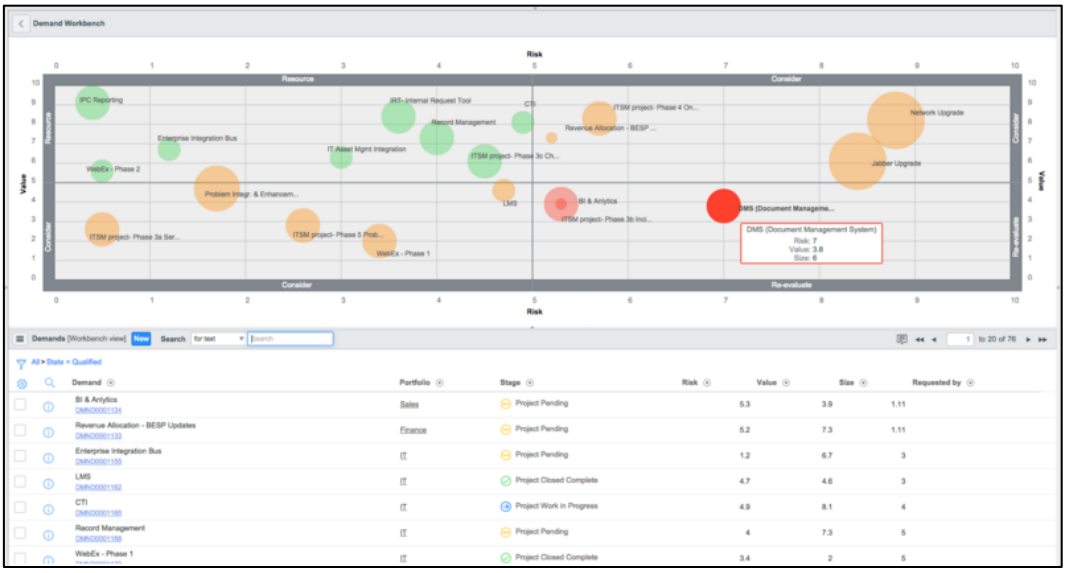
## Use of the Demand Workbench

A bubble chart is a graph that plots multiple demands based on three categories: risk, value, and size. Each demand is represented on the bubble chart by a circle that varies in size and color depending on the average of the scores for these categories. The bubble chart in the demand workbench displays all qualified demands and is dynamically updated as demands are created and assessed. This makes it a useful tool for demand managers, stakeholders, and decision makers to visually assess and compare demands.

The list view on the demand workbench displays a list of the qualified demands that appear in the bubble chart. Selecting a demand from this list highlights the demand in the bubble chart and displays the demand form. The list view is also integrated with Live Feed so users can see current activity for a demand.

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1. To access the Demand Workbench, navigate to **Demand > Demands > Workbench**.




## Demand Workbench

The demand workbench provides a central location for viewing and assessing business demands. The demand workbench makes it easy to manage demands by presenting multiple interactive views of demand information on one page. The workbench is split into two panes: the top pane presents an interactive bubble chart for assessing demands, and the bottom pane displays the demand details in a list view.

The demand workbench provides real-time interaction between the two panes. Modifying a demand in the bubble chart automatically updates the values in the demand record. Similarly, changes made to a demand record are automatically reflected in the bubble chart.

By default, the workbench displays demands that have been screened by stakeholders or qualified by the demand manager. With the demand manager role, you can use the workbench to:

- View, evaluate, and update demands
- Create new demands
- Create artifacts from demands, including projects, enhancements, changes, and defects

With the demand user role, you can view and evaluate demands.

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## Demand Workbench Components

The demand workbench includes the following components:

- The top pane displays demands in a bubble chart
- The bottom pane displays demands in a list view
- The header includes a back button **<** that opens the Demands list

## Interactive Bubble Chart

The bubble chart on the demand workbench is a dynamically updated graph that plots metrics for multiple demand records. Demand managers can use bubble charts to visualize, compare, and evaluate the relative standing of demands in three categories: risk, value, and size. The **X**-axis represents the risk of a demand, the **Y**-axis represents the value, and the **Z**-axis represents the size. Demands are plotted as circles, or bubbles, which vary in size according to the size of the demand. All three measurements are based on values between **0** and **10**. This scale allows demand managers to see how one demand compares to other demands in the chart.

## Quadrants

The bubble chart contains four quadrants, with each quadrant representing the value versus risk tradeoff for the demand. The quadrants are labeled along the edges of the bubble chart to represent this combination of value versus risk. The color of the bubbles displayed in each quadrant also represents the value versus risk tradeoff.

- The upper-left quadrant, labeled **Resource**, contains demands with high value and low risk. Green bubbles represent demands in this quadrant.
- The lower-left and upper-right quadrants, labeled **Consider**, contain demands that require further evaluation. The lower-left quadrant contains demands with low risk but low value; the upper-right quadrant contains demands with high value but high risk. Orange bubbles represent demands in these quadrants.
- The lower-right quadrant, labeled **Re-evaluate**, contains demands with low value and high risk. **Red** bubbles represent demands in this quadrant.

Each bubble also includes a label with the name of the demand.

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## List View

The lower pane of the demand workbench displays a list of the demands shown in the bubble chart. This list displays up to 20 demands at a time. Page forward and back through the list to display additional demands.

The **Demand** column uses a composite field that combines the demand name and number, with the number providing a link to the Demand form. The **Stage** column displays the status or progress of the demand. For more information, see **Stage Fields**.

The interactive bubble chart updates whenever you make a change to a demand in the list view. If you create a new demand from the demand workbench, it is created in a qualified state and appears on the bubble chart. When a demand is promoted to a project, enhancement, change request, or defect, it is removed from the bubble chart.

## Bubble Chart Actions

From the demand workbench bubble chart, you can:

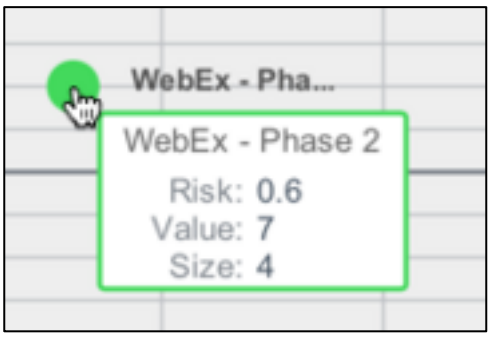
- Point to a bubble to view a summary of the demand, including the demand name and the risk, value, and size
- Click a bubble to open a sizing window and change the size of the demand
- Click and drag a bubble to increase or decrease the risk or value of the demand
- Right-click a bubble to view the demand, create an artifact, or view an artifact that has been created from a demand

Changes made to a demand in the bubble chart are automatically updated in the demand record.

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## View a Demand Summary

Point to a demand in the bubble chart to highlight the bubble and its label. This also displays a bubble summary window that shows the demand name and the risk, value, and size data. Pointing to the bubble also highlights the corresponding demand row in the list view. Pointing to a demand in the list view highlights the corresponding bubble in the bubble chart.




**Note**: When pointing to a bubble, you may need to scroll down in the list view to see the corresponding highlighted demand row. If necessary, adjust the height of the list view or the bubble chart.

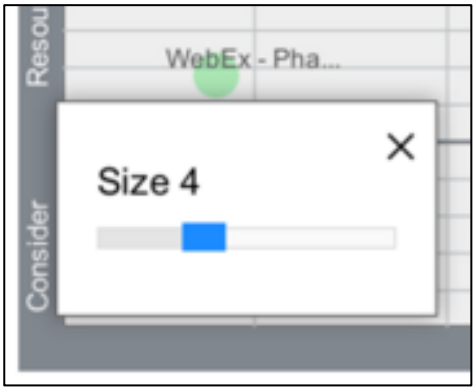
If there are many demands, some of the bubbles or labels may overlap and be difficult to see. If this happens, point to a label to highlight the corresponding bubble. This is useful if:

- Two or more bubbles have the same metrics and overlap directly
- Several bubbles intersect and overlap
- A bubble is only partially visible on the edge of the bubble chart

## Move and Resize Demands

As the demand manager, you can move and resize bubbles in the bubble chart. These actions update the corresponding values for the demands in the list view.

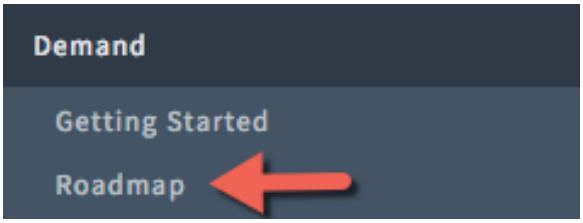
- Clicking and dragging a bubble left or right along the horizontal axis decreases or increases the risk of the demand. The new risk for the demand is updated in the **Risk** column.
- Clicking and dragging a bubble up or down increases or decreases the value of the demand. The new value for the demand is updated in the **Value** column.
- Clicking a bubble opens a sizing window where you can increase or decrease the size of the bubble. The size of the demand is updated in the **Size** column.




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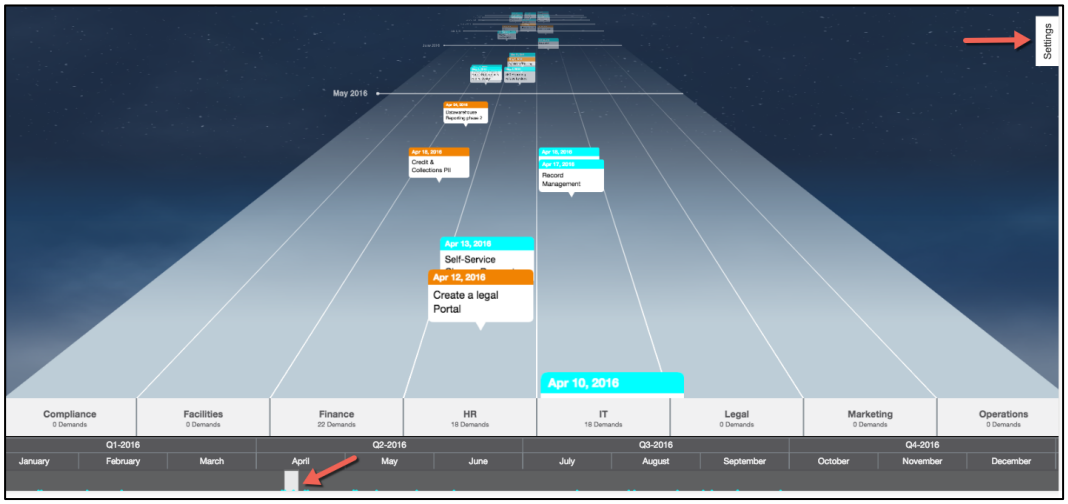
## Demand Roadmap

1. Navigate to **Demand > Roadmap**.




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

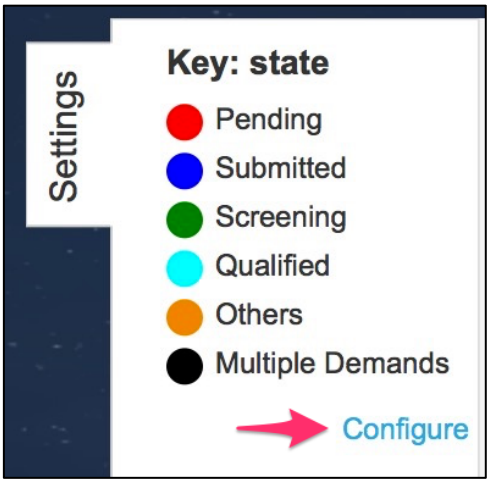
3. Select the **Date Slider** to move the roadmap forward and backwards by sliding the selector left and right.




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

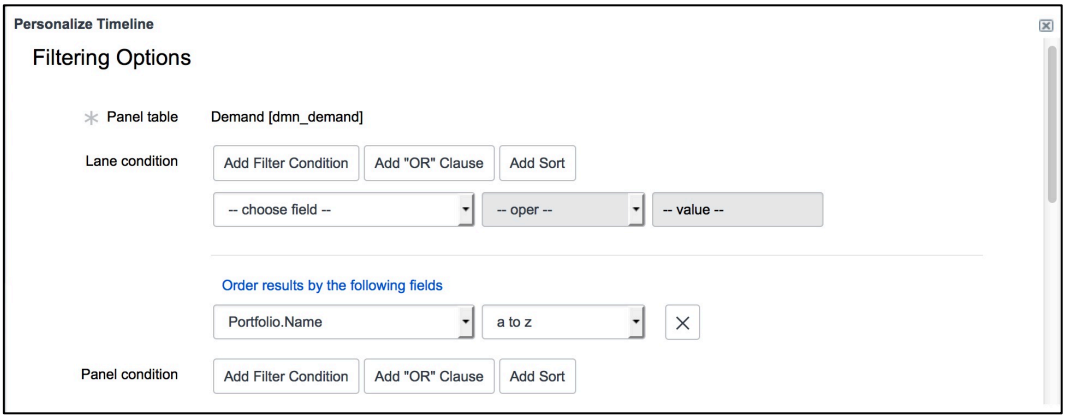
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5. Select **Configure** as denoted in the screenshot.



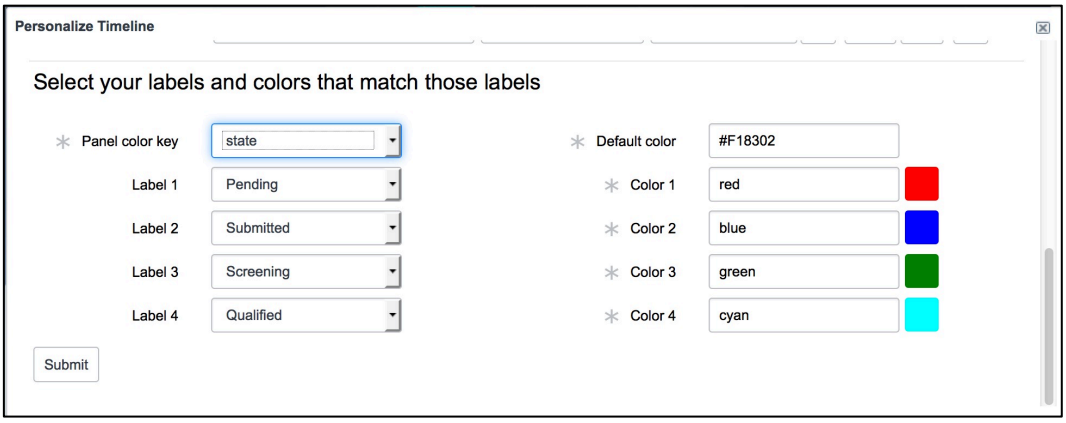

6. The **Personalize Timeline** Dialog opens.

7. On the top portion of the dialog you can configure the filter options for your timeline.



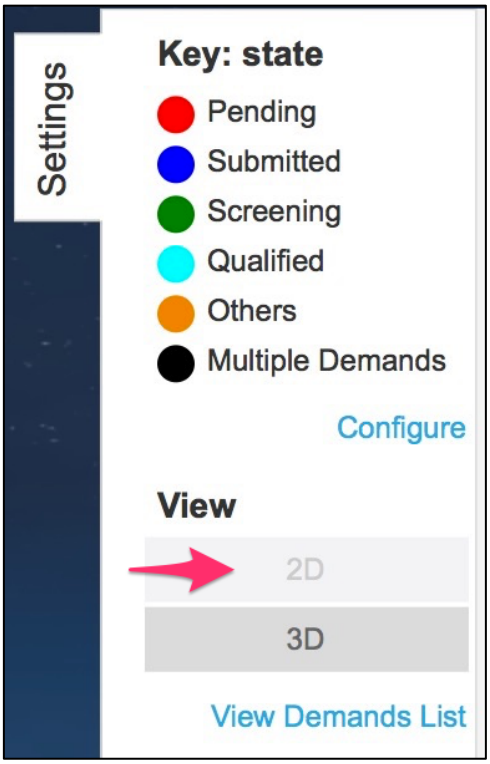

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8. On the bottom portion of the dialog you can configure the colors based on criteria.



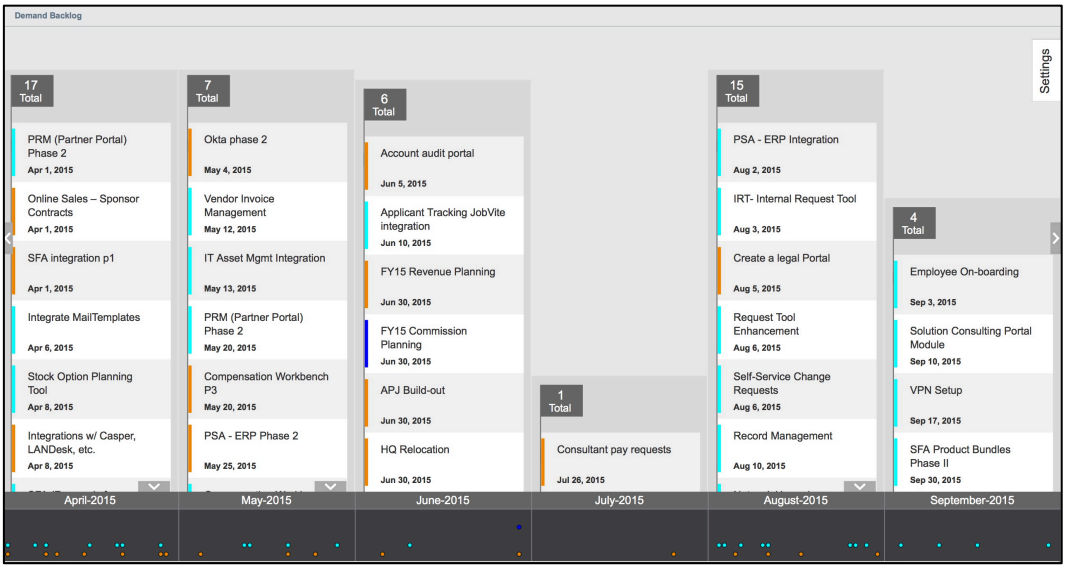

9. When you are done, click **Submit** or the **X** in the top-right corner.

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

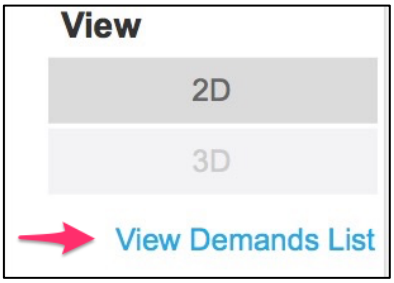



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11. The Roadmap now changes to a 2-dimensional view.

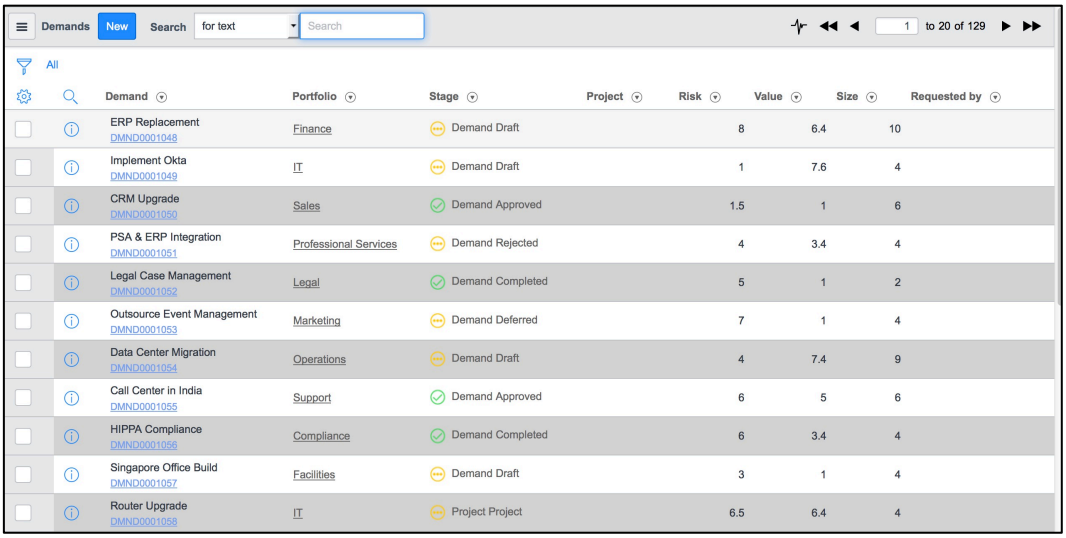



12. Click the **Demands List** as denoted in the screenshot below.




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13. A list of all the demands on the current timeline open in a new tab.



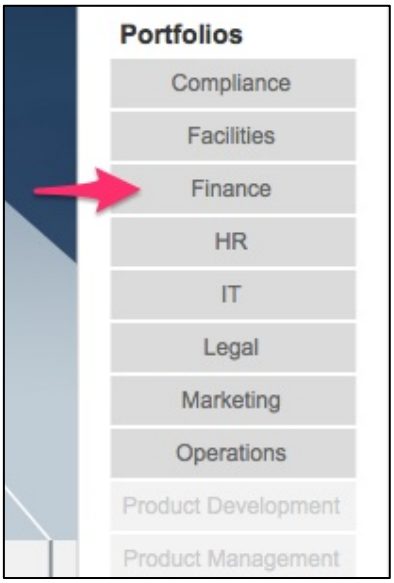

| Demand | Portfolio | Stage | Project | Risk | Value | Size | Requested by |
|---|---|---|---|---|---|---|---|
| ERP Replacement DMND0001048 | Finance | Demand Draft | | 8 | 6.4 | 10 | |
| Implement Okta DMND0001049 | IT | Demand Draft | | 1 | 7.6 | 4 | |
| CRM Upgrade DMND0001050 | Sales | Demand Approved | | 1.5 | 1 | 6 | |
| PSA & ERP Integration DMND0001051 | Professional Services | Demand Rejected | | 4 | 3.4 | 4 | |
| Legal Case Management DMND0001052 | Legal | Demand Completed | | 5 | 1 | 2 | |
| Outsource Event Management DMND0001053 | Marketing | Demand Deferred | | 7 | 1 | 4 | |
| Data Center Migration DMND0001054 | Operations | Demand Draft | | 4 | 7.4 | 9 | |
| Call Center in India DMND0001055 | Support | Demand Approved | | 6 | 5 | 6 | |
| HIPPA Compliance DMND0001056 | Compliance | Demand Completed | | 6 | 3.4 | 4 | |
| Singapore Office Build DMND0001057 | Facilities | Demand Draft | | 3 | 1 | 4 | |
| Router Upgrade DMND0001058 | IT | Project Project | | 6.5 | 6.4 | 4 | |

14. Go back to **Demand Roadmap** tab or close **Demand List** tab.

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

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

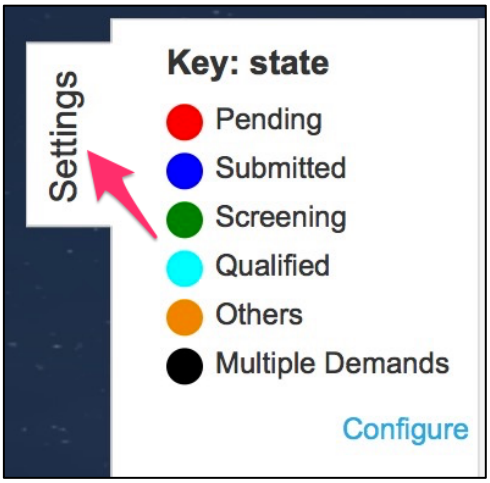
17. Click another Portfolio. It is added to the roadmap.




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

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




19. Close the **Roadmap** tab.

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# Lab Goal

This lab familiarizes you with the steps involved in configuring Ideation and Demand Management.

**Lab 6.0 Demand Configuration**

## Overview

Before using demand management, demand managers should perform these tasks:

- Complete preliminary planning
- Populate the stakeholder registry
- Create assessment categories

## Plan for Demand Management

**Roles**: Determine who should have the demand manager [**demand_manager**] and demand user [**demand_user**] roles.

**Portfolios**: Determine how you want to group or categorize demands, and then have a user with the **project_manager** role create portfolios based on those groupings. Demands can belong to multiple portfolios.

**Stakeholders**: Identify individuals who have the appropriate domain knowledge to evaluate demands related to each portfolio. Then, make them stakeholders for that portfolio and identify if they are to receive assessments or be demand approvers. Changes made to **Approver** or **Receive Assessment** in the demand record update the stakeholder register.

**Assessments**: Consider using assessments to facilitate the information gathering process. Define metric categories and assessment metrics needed to develop and distribute assessments to the appropriate audience. Assessments are automatically sent to the **Receive Assessment** portfolio stakeholders after the demand is moved into the screening state.

**Resource plans**: Consider developing resource plans to help the organization understand the time and resource costs associated with the demand. Resource plans require that the Resource Management application is active. Resource plans created for approved demands create duplicate resource plans in the project record.

**Enhancement and defect requests**: Determine if you need the ability to manage enhancement and defect requests as demands. This functionality requires that the SDLC -Scrum Process Pack is active.

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## Populate the Stakeholder Registry

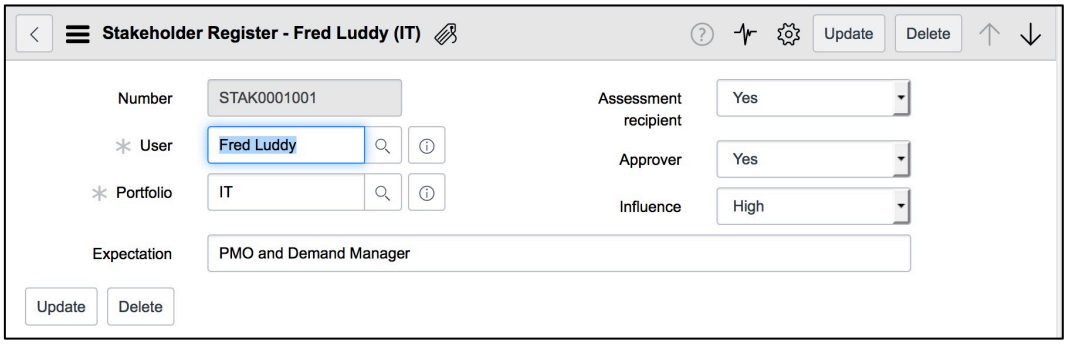
Add users to the stakeholder registry so that demand management can automatically populate the stakeholder list when a user creates a demand.

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

2. Click **New**.




3. Provide the Following:
   - User: **Fred Luddy**
   - Portfolio: **IT**
   - Assessment recipient: **Yes**
   - Approver: **Yes**
   - Influence: **High**
   - Expectation: **PMO and Demand Manager**




4. Click **Submit**.

   **Note**: When adding a user to the stakeholder registry, the combination of the user and the assigned portfolio must be unique.

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## Assessment Categories

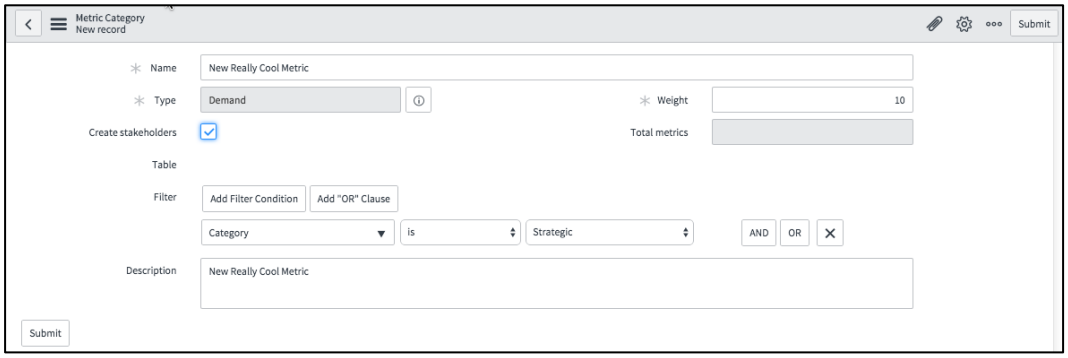
Assessment categories are used in conjunction with assessment metric types and assessment metrics to generate bubble charts. The Demand Management application comes with the **Demand** assessment metric type, five assessment metric categories, and a number of assessment metrics.

Default demand management assessment categories are as follows:

- **Size**: Assesses demand size relative to the size of other demands
- **Strategic Alignment**: Assesses how closely the demand aligns with strategic goals of the organization compared to other demands
- **Risk**: Assesses demand risks compared to other demands
- **ROI**: Assesses demand return on investment compared to other demands
- **Cost**: Assesses demand cost compared to other demands

Navigate to one of the following to modify existing assessment categories and create new categories:

1. Navigate to **Demand > Settings > Assessments**.
2. Click **New** to create new **Metric Category**:
   - Name: **New Really Cool Metric**
   - Create stakeholders: **Checked**
   - Weight: **10**
   - Filter: **Category is Strategic**
   - Description: **New Really Cool Metric**




3. Click **Submit**.
4. After the Category is submitted you return to the list. Find the new Category and open it.

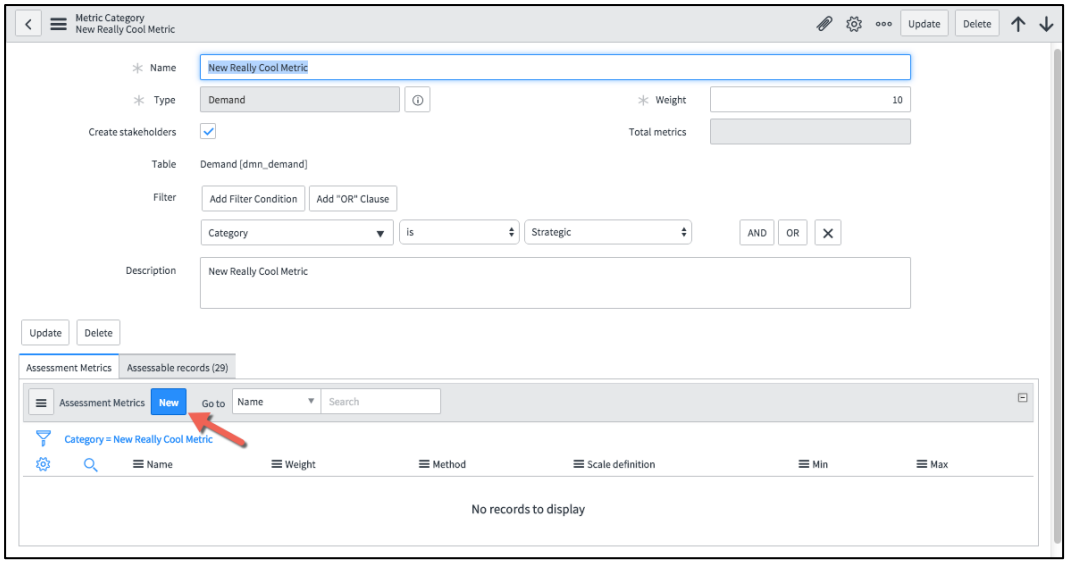
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## Assessment Metrics

After you create a category, create metrics you can use to evaluate the assessable records for that category. When you create metrics, consider the focus of the category and what characteristics you want to measure for the items you will assess. If you plan to use metrics for assessment questionnaires, you may want to review tips for writing good questions.

1. Scroll to Related Lists and find **Assessment Metrics**.

2. Click **New** to create an **Assessment Metric**.




3. Provide the following:

   - Metric **Name**
   - Provide a **Question**
   - Provide a **Description**

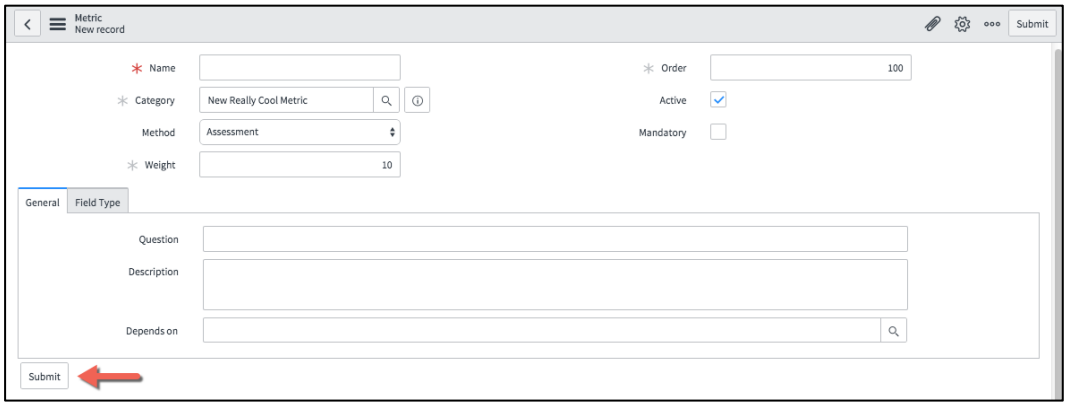
4. Click the **Field Type** tab:

   - For Data Type select **Number**
   - For Scale Definition select **High**
   - For Min enter **0**
   - For Max enter **10**



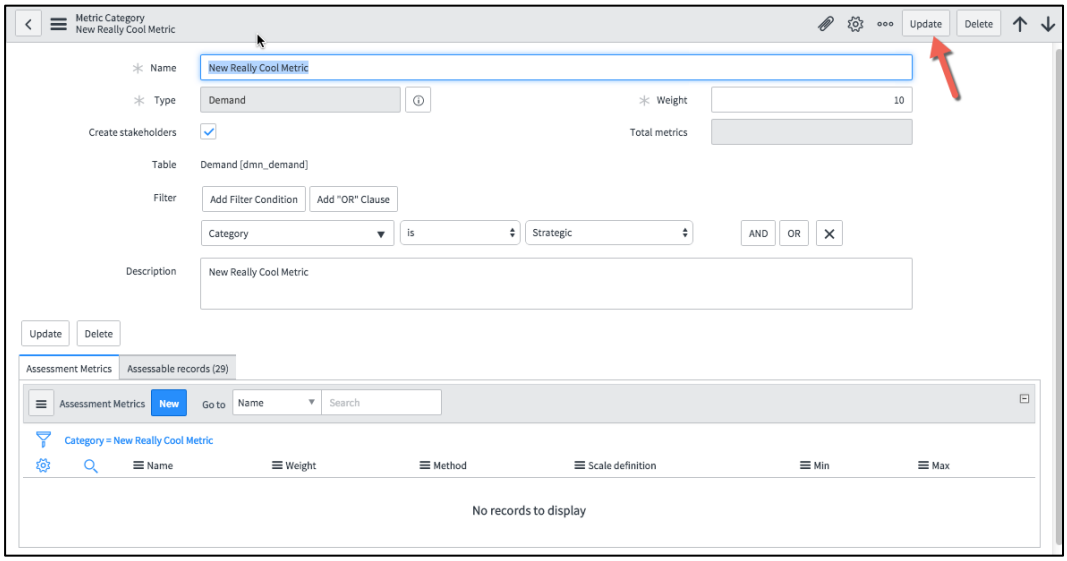

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5. Click **Submit**.




6. You are redirected to the **Metric Category**.

7. Click **Update**.




**Note**: During the lab we are not able to cover all of the available metric data types. It is important that you access the documentation site and view the additional information that is provided in relation to Choice or Likert Scale questions. This information can be found here: https://docs.servicenow.com/bundle/helsinki-security-management/page/administer/assessments/concept/c_AssessmentMetrics.html

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## View and Create Bubble Charts

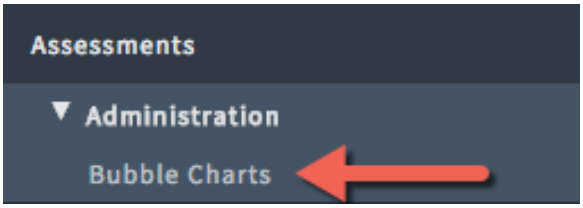
Bubble charts are useful for comparing demands based on common metrics such as risk rating, return on investment, and cost. Decision makers can use bubble charts when considering which demands to approve or reject.

An interactive bubble chart for assessing business demands is available on the demand workbench. By default, this bubble chart displays all qualified demands based on three measurements: risk, value, and size.

For the lab we create a new bubble chart.

1. Navigate to **Assessments > Administration > Bubble Charts**.

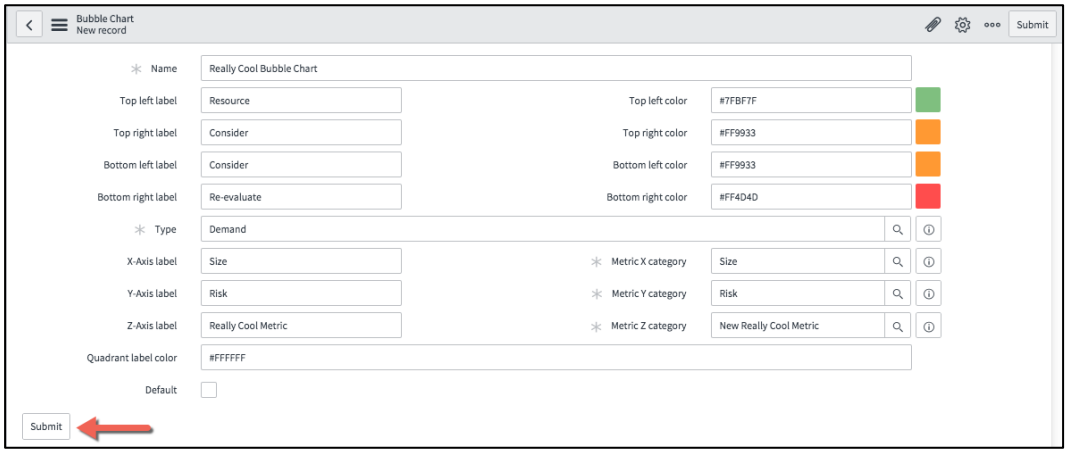
   **Note**: If Bubble Charts do not exist in the navigation panel, the **Assessments** application menu needs to be enabled. To do this, navigate to **System Definition > Application Menu.** Search for and open **Assessments**. Ensure that the field **Active** is checked.




2. Click **New**.

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3. Populate the following:
   - Name: **Really Cool Bubble Chart**
   - Type: **Demand**
   - X-Axis label: **Size**
   - Y-Axis label: **Risk**
   - Z-Axis label: **New Really Cool Metric**
   - Metric X category: **Size**
   - Metric Y category: **Risk**
   - Metric Z category: **New Really Cool Metric**

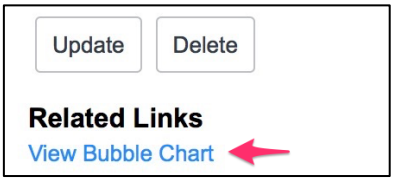



4. Click **Submit**.

5. You are redirected to the list of Bubble Charts.

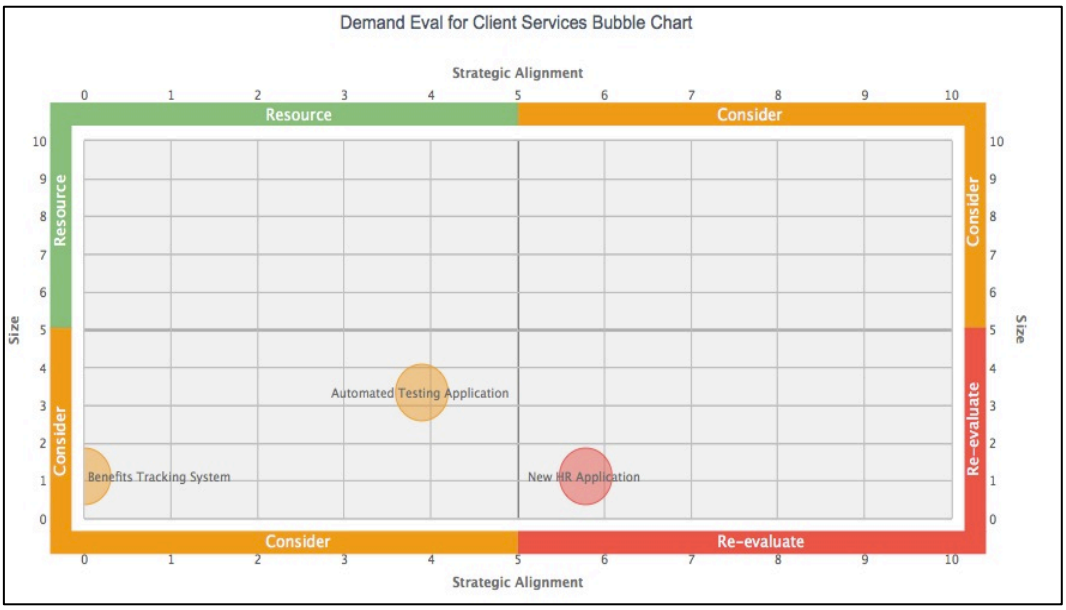
6. Find and **Open** the Bubble Chart you just created.

7. Scroll to Related Links and select **View Bubble Chart**.




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8. You should see a bubble chart similar to the example – with potentially different demands appearing in the different quadrants.




**Good Job! Thanks for attending this Lab!**

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