Lab Guide

Inside Project Portfolio Management 102

Brian McQuillan & Chris Kaeser

Default Login / Password:

admin / Knowledge16

itil / Knowledge16

employee / Knowledge16

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Lab Goal

Lab 1.1 Program Creation

This lab explains how to create a Program as a standalone program with its associated tasks, risks, issues and milestones, as well as add demand and projects to the program.

- Create a standalone program
- Create program tasks
- Create program risks
- Create program issues
- Create milestone

A program helps you to logically group related projects or demands under a single entity. A program helps you to manage related projects and demands in a coordinated way, which otherwise won't be possible if managed independently.

Login Information

1. Navigate to the unique instance **URL** provided to you.
2. Log on as user **ADMIN** and use the password **Knowledge16**.
3. Impersonate **George.Tukis** (Program Mgr).

Create a Standalone Program

Create a program to manage related projects and demands. Define the program duration, estimated cost, benefits, and ROI to the organization.

1. Navigate to **Project** > **Programs** > **Create New**.
2. Fill out the program form (see table).
3. Click **Submit**.

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Program Form

Field	Description	Enter this Value
Program Name	The name of the program.	**PMO Implementation**
Program manager	The program manager assigned to the program.	**George Tukis**
Portfolio	The portfolio to which the program belongs.	<Leave blank>
Number	A system generated number with a configurable prefix.	
State	The current state of the program. Following are the default states: **Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, Closed Skipped**.	**Pending**
Description	A detailed description of the program.	**PMO Implementation to better align project activity, business strategy and investments** **There will be a series of projects and demand that will support this implementation:** *** Assessment** *** Governance and Methodology** *** Process/Methodology Implementation** *** PPM Tool Requirements definition** *** PPM Tool Implementation** *** Proof of Concept and Pilot**

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Program for Date Tab

Field	Description	Enter this Value
Planned start date	The intended date the program should begin.	**2016-06-01**
Planned end date	The intended date the program should end. The end date will extend based on the end date of the program tasks, projects, and demands.	< Leave as is>
Planned duration	The expected duration of this program. The planned duration is updated whenever the planned end date of the program changes.	**45 days**
Actual start date	The date that the program actually began.	<Leave blank>
Actual end date	The date that the program actually ended.	< Leave blank>
Actual duration	The actual duration of the program from program start to program closure.	< Leave blank>

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Program Form Financials Tab

Field	Description	Enter this Value
Estimated cost	An estimated cost of the program. If you have created cost plans for the included projects and demands, the value is rolled up from the cost breakdown of program. You can also enter the value manually. Select a currency icon and enter a value.	<Leave as ZERO>
Actual cost	The actual cost of the program. The value is rolled up from the cost breakdown of the program. You can also enter the value manually. Select a currency icon and enter a value.	<Leave as ZERO>
Budget cost	Budgeted cost for this program. The value is rolled up from the cost breakdown of the program. You can also enter the value manually. Select a currency icon and enter a value.	<Leave as ZERO>
Planned benefit	Enter the Planned benefit value for the program.	<Leave as ZERO>
Planned returns	**Planned returns** value is derived from the difference of the **Planned benefit** and Estimated cost values. (**Planned benefit** - **Estimated cost**)	<System calculated>
Planned ROI%	The result is calculated based on values in the **Planned return** and **Estimated cost** fields. (**Planned return/Estimated cost** x 100)	<System calculated>

Remember to click **Submit**.

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Create Program Tasks

Create tasks specific to the program. These tasks are essential for completion of the program but are outside the scope of projects. You can create program tasks from the Program form related lists.

1. Navigate to **Project** > **Programs** > **All**.
2. Select the program **PMO Implementation** from the list.
3. In the Program Tasks related list, click **New**.
4. Fill out the form fields (see table).
5. There are a few fields that are populated after the task is created.
6. Click **Submit**.

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Program Task #1

Field	Description	Value
Short description	A brief description of the program task.	**Create Program Charter**
Number	A system generated number with a configurable prefix.	**<Leave as is>**
State	The current state of the program. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *Closed Skipped*.	**Pending**
Planned start date	The estimated date and time for the program task to start.	**2016-06-02**
Planned end date	The estimated date and time for the program task to end.	<Leave as is>
Planned duration	The estimated length of time (from start time to end time) of the program task.	**5 days**
Assigned to	The user assigned to the program task.	**George Tukis**
Milestone	A milestone is a program task with a duration of zero (0). Use milestones to mark key dates in your program, such as key decision points or approvals.	<Leave blank>
Key milestone	You can define a milestone as a key milestone to track the program progress (this is visible on the program timeline). For example, you can create a key milestone for completion of deliverables such as a program plan.	<Leave blank>
Description	A detailed description of the program task.	**Fill out the required documents (Charter) for implementing a PMO**
Additional comments (Customer visible)	Enter information that you want the users to see.	
Work notes	Enter work notes about the milestones, impediments, or changes as the program progresses.	

Note: Remember to click **Submit**.

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1. Create another Program Task.
2. In the Program **Tasks** related list, click **New**.
3. Fill out the form fields (see table).
4. Click **Submit** and then click **Update**.

Program Task #2

Field	Description	Value
Short description	[Required] A brief description of the program task.	**Get approval for the Program Charter**
State	The current state of the program. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *Closed Skipped*.	**Pending**
Planned start date	The estimated date and time for the program task to start.	**2016-06-09**
Planned end date	The estimated date and time for the program task to end.	**<Leave as is>**
Planned duration	The estimated length of time (from start time to end time) of the program task.	**4 days**
Assigned to	The user assigned to the program task.	**George Tukis**
Description	A detailed description of the program task.	**Attain the Executives and PMO Directors approval**

Note: Remember to click **Submit** and then click **Update**.

Create Program Risk

Create risks specific to the program. Risks are future events that you can assume or anticipate in a program; they require different types of assessment and management. You can create program risks from the Program form related lists.

1. Navigate to **Project** > **Programs** > **All**.
2. Select the program **PMO Implementation** from the list.
3. In the Program **Risk** related list, click **New**.

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4. Fill out the form fields (see table).
5. Click **Submit**.

Program Risk #1

Field	Description	Value
State	The current state of the program. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *and Closed Skipped*.	**Pending**
Probability	A risk is an event that "may" occur. The choices include: Absolute, High, Moderate, Low	**High**
Number	A system generated number with a configurable prefix.	<Leave as is>
Estimated Cost	Cost the event will generate should it occur.	0.00
Actual Cost	Cost generated by the event. This information is added when and if the event occurs.	0.00
Short description	Brief description of the event and its potential impact on the success of the activity specified in the Program.	**Staff turnover or lack of staff: only one project leader is responsible for all projects**
Mitigation plan	Define options and actions to enhance opportunities and reduce threats to project objectives.	

Note: Remember to click **Submit**.

1. Create another Program Risk.
2. In the Program Risk related list, click **New**.
3. Fill out the form fields (see table).
4. Click **Submit** and then click **Update**.

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Program Risk #2

Field	Description	Value
State	The current state of the program. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *and Closed Skipped*.	**Pending**
Probability	A risk is an event that "may" occur. The choices include: Absolute, High, Moderate, Low.	**Moderate**
Short description	[Required] A brief description of the program task.	**We did not meet "must have" requirements**

Note: Remember to click **Submit** and then click **Update**.

Create Program Issue

Create issues specific to the program. An issue is a major problem, opportunity, dispute, concern, situation, or something to be decided that will impede the progress or successful completion of the program and requires immediate resolution. You can create program issues from the Program form related lists.

1. Navigate to **Project** > **Programs** > **All**.
2. Select the program "**PMO Implementation**" from the list.
3. In the Program **Issue** related list, click **New**.
4. Fill out the form fields (see table).
5. Click **Submit**.

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Program Issue #1

Field	Description	Value
Number	A system generated number with a configurable prefix.	<Leave as is>
Assigned to	The user assigned to the program task.	**Beth Anglin**
Configuration Item	Item or service affected	<Leave blank>
Priority	Importance of the issue as it applies to the overall program. Choice values - Critical, High, Moderate, Low and Planning.	**Moderate**
State	The current state of the program. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *Closed Skipped*.	**Open**
Parent	Related Program.	<System populated>
Short description	A brief description of the program task.	**Software process management tool not available**
Description	A detailed description of the program task.	<Leave blank>
Work notes	Enter work notes about the milestones, impediments, or changes as the program progresses.	<Leave blank>

Note: Remember to click **Submit**.

1. Create another Program Issue.
2. In the Program Issue related list, click **New**.
3. Fill out the form fields (see table).
4. Click **Submit** and then click **Update**.

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Program Issue #2

Field	Description	Value
Number	A system generated number with a configurable prefix.	<Leave as is>
Assigned to	The user assigned to the program task.	**Danny Dales**
Configuration Item	Item or service affected.	<Leave blank>
Priority	Importance of the issue as it applies to the overall program. Choice values - Critical, High, Moderate, Low and Planning.	**Critical**
State	The current state of the program. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *Closed Skipped*.	**Open**
Short description	A brief description of the program task.	**Losing critical staff at crucial point of the project**

Note: Remember to click **Submit** and then click **Update**.

Create Program Milestone

Create milestones specific to the program. A milestone is a project task with a duration of zero (0). Use milestones to mark key dates in your program, such as key decision points or approvals. You can create program milestones from the Program form related lists.

1. Navigate to **Project** > **Programs** > **All**.
2. Select the program **PMO Implementation** from the list.
3. In the Program **Task** related list, click **New**.
4. You will need to mark the program task as a **Milestone** and / or **Key Milestone**.
5. Click **Submit**.

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Program Milestone

Field	Description	Value
Short description	A brief description of the program task.	**Charter**
Number	A system generated number with a configurable prefix.	<Leave as is>
State	The current state of the program. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *Closed Skipped*.	**Pending**
Planned start date	The estimated date and time for the program task to start.	**2016-06-14**
Planned end date	The estimated date and time for the program task to end.	<Leave as is>
Planned duration	The estimated length of time (from start time to end time) of the program task.	<Leave as is>
Assigned to	The user assigned to the program task.	**George Tukis**
Milestone	A milestone is a program task with a duration of zero (0). Use milestones to mark key dates in your program, such as key decision points or approvals.	**Check**
Key milestone	You can define a milestone as a key milestone to track the program progress. For example, you can create key a milestone for completion of deliverables such as a program plan. A key milestone is visible on the program timeline.	
Description	A detailed description of the program task.	**Charter compete & approved**
Additional comments (Customer visible)	Enter information that you want the users to see.	<Leave blank>
Work notes	Enter work notes about the milestones, impediments, or changes as the program progresses.	<Leave blank>

Note: Remember to click **Submit**.

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1. Create another Program Milestone, but make this one a **Key Milestone**.
2. In the Program Task related list, click **New**.
3. Fill out the form fields (see table).
4. Click **Submit** and then click **Update**.

Program Key Milestone

Field	Description	Value
Short description	A brief description of the program task.	**Methodology, PPM Solution, Skills Assessment**
State	The current state of the program. The states include: *Pending*, *Open*, *Work in Progress*, *Closed Complete*, *Closed Incomplete*, *Closed Skipped*.	**Pending**
Planned start date	The estimated date and time for the program task to start.	**2016-07-21**
Planned end date	The estimated date and time for the program task to end.	<Leave as is>
Planned duration	The estimated length of time (from start time to end time) of the program task.	<Leave as is>
Assigned to	The user assigned to the program task.	**George Tukis**
Milestone	A milestone is a program task with a duration of zero (0). Use milestones to mark key dates in your program, such as key decision points or approvals.	**Check**
Key milestone	You can define a milestone as a key milestone to track the program progress. For example, you can create key milestone for completion of deliverables such as a program plan. A key milestone is visible on the program timeline.	**Check**

Note: Remember to click **Submit** and then click **Update**.

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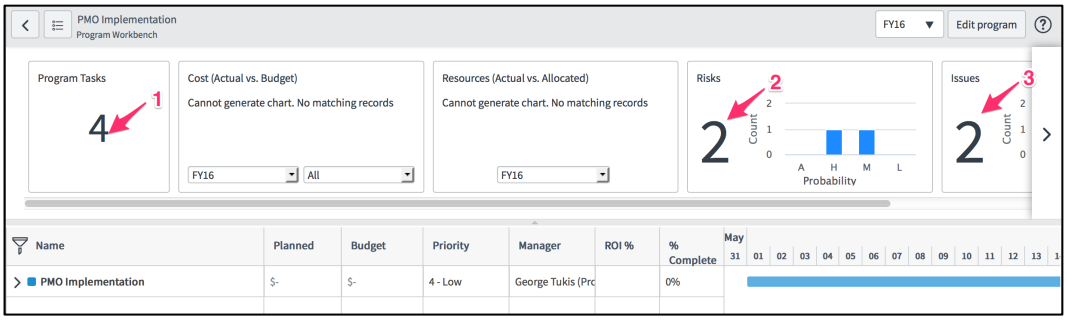
Lab Success Verification

Open the Program Workbench for **PMO Implementation**.

1. Navigate to **Project** > **Programs** > **Workbench**.
2. Select the program **PMO Implementation** from the list.

Program Workbench

Your screen should look like the example.



1. Represents all Program tasks (tasks and milestones)
2. Represents the Risks
3. Represents the Issues

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Lab Goal

Create Demand records that are linked to the Program **PMO Implementation** created above.

- Create a demand record and link it to the Program
- Create related resource plan for the demand record
- Create related cost plan for the demand record

Lab 2.1 Create Program Demand Records

Create a Demand

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

1. Navigate to **Demand** > **Demands** > **Create New**.
2. Fill in the fields on the demand form, as appropriate (see table).
3. Right-click the form header and select **Save** to save the record.

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Demand Form – Part #1

Field	Description	Value
Name	The name of the demand.	**PPM Tool Requirements Definition / RFI Development**
Number	The unique, auto generated identification number for the demand.	<Leave as is>
Category	The category of the demand: Strategic Operational	**Strategic**
Type	The type of demand. Project Enhancement Change Defect Selections available in this field are determined by the Category field selection. The Enhancement and Defect options only appear if the administrator has activated the SDLC-SCRUM plugin. The selections in the Category and Type field also determine the fields that are displayed in the Assessment Data related list.	**Project**
Portfolio	The portfolio indicating the business focus of the demand.	<Leave blank>
Program	The name of the program created from this demand.	**PMO Implementation**
Demand Manager	Name of the demand manager.	**Danny Dales**
Submitted by	The user making the demand.	**Allyson Gillispie**
Expected Start	The expected start date for the demand.	**2016-08-01**
Due Date	The requested completion date for the demand.	**2016-12-30**
Goal	Select a goal. One demand can only have one goal.	<Leave blank>

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Demand Form – Part #2

Field	Description	Value
Assessment Data tab		
Business case	Business arguments that support the demand.	**Implement a more consistent project management process and methodology**
T-Shirt size	The size of the demand. Before using T-Shirt size as an indicator of demand size, consider creating and publishing definitions for each option, outside the application, so that their values are interpreted correctly and consistently across the organization or department.	**XL – Extra Large**
Impact	Estimate the magnitude or severity.	**2 – Medium**
Capital expense	Capital expenditure (Capex) for the demand.	<System will calculate>
Operational expense	Operational expenditure (Opex) for the demand.	<System will calculate>
Total costs	The result is calculated based on values in the Capital expense and Operational expense fields.	[Read-Only]
Financial benefit	An estimate of revenue if the demand is approved.	**64,500**
Financial return	The result is calculated based on values in the Total costs and Financial benefit fields.	[Read-Only]
ROI %	The result is calculated based on values in the Total costs and Financial return fields.	[Read-Only]

Note: Remember to right-click the form header and select **Save** to save the record.

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Create a Demand Resource Plan

The demand manager can create a resource plan from the demand related list **Resource Plan**. A Demand resource plan captures resource plan costs directly in the resource plan record. Resource plan costs are divided into planned, allocated, and actual.

1. On the demand **PPM Tool Requirements Definition / RFI Development**, select the **Demand Resource Plans related list,** click **New**.
2. Fill in the fields on the demand form, as appropriate (see table**).**
3. Click **Submit**.

Demand – Resource Plan

Field	Description	Value
Number	Automatically generated identification number for the plan, starting with RPLN.	<System generated>
Resource Type	Category of resource. Select *Group Resource* to select a group or *User Resource* to select an individual user.	**Group Resource**
Group Resource / User Resource	Specific group or user resource to associate with the plan.	**Database**
Request type	The type of request: hourly or full time. Select Hours to specify a request in terms of hours and FTE to specify a request in terms of full time equivalents.	**Hours**
Planned Hours	Estimated number of work hours required completing all resource plan work. This option appears if you select Hours for the Request type.	**500**
Allocated Hours	Total hours that the resources are allocated to resource plan work. These are considered hard allocations. This value is rolled up from the hours allocated on all resource allocations associated with the plan.	[Read-only]

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Field	Description	Value
Actual Hours	All hours recorded on the time cards, which refer to the resource plan for users who completed plan work.	[Read-only]
Members preference	Whether you want Specific members from the group or All members. The default is set to All members. If the specific resource name is not known, leave value as All members. This makes a request for all the members of the group and divides the time among group members equally depending upon their schedules. Before making the hard allocation, when the resource names become known, you can retain the required members and remove those who are not required.	**All members**
Allocation	The type of resource distribution across the project. This determines the type of allocation records. The value in this field determines how the planned hours will be distributed across resource plan duration among requested resources. Select any of the following: **Weekly:** Create week-long allocations up to the end of the planned end date. **Monthly:** Create month-long allocations up to the end of the planned end date. This is the default value. **Planned Duration**: Create one allocation for each user for the entire duration of the task.	**Monthly**
Name	Description of the resource plan.	Database level of effort
Task	Task the plan applies to. If the resource plan was created from a project task, the task number appears here.	<Populated by system>

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Field	Description	Value
Start Date	Start date for the resource plan. By default, this shows the Planned start date of the associated project record or task record. Edit the default date, if necessary. Resource plan dates do not automatically change if the associated project task dates change.	**2016-08-01**
End Date	End date for the resource plan. By default, the date is derived from the Planned end date of the associated project record or task record. Edit the default date, if necessary.	**2016-12-30**
State	The plan starts in the Planning state. See Resource plans for a description of states.	[Read-only]
Planned Cost	Amount in Planned Hours multiplied by the hourly rate of the specified user or group resource. This is a first draft estimate of the resource plan cost. Please note that while requesting for resources from a group, if the name of the specific resource is not known, the value can be left as All members. It would request time from all the members of the group (dividing the time among group members equally depending upon their schedules). Before making the hard allocation, when the resource names become known, the resource manager can retain the required member(s) and remove the others, which are not required.	[Read-only]

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Field	Description	Value
Allocated Cost	Amount on all resource rate cards multiplied by total allocated hours. Used to give a more accurate estimation on the cost of the plan when it is being allocated. If no labor card is found for the user, then the hourly rate is taken from the following time card property: Default hourly rate used when processing time cards if we can't get a rate from labor rate cards (in system currency).	[Read-only]
Actual Cost	Based on the same time cards used for the Actual Hours, the actual cost is calculated using the cost of each user and the hours the user worked. Used to inform resource requesters and resource managers of actual costs based on the actual hours that user resources added on their time cards.	[Read-only]
Notes	Additional correspondence and information.	

Note: Remember to click **Submit**.

Create a Demand Cost Plan

The demand manager can create a cost plan from the demand related list COST PLANS. Demand cost plans capture the costs of demands. Create a cost plan to specify the unit cost of a cost type for a fiscal period.

The application automatically creates cost plan breakdown records when you save the cost plan. The cost plan breakdowns are records that specify the estimated and actual costs and the budget at a granular level for specific fiscal periods, such as FY16: April and FY16: May.

1. Navigate to **Demand** > **Demands** > **All**.
2. Select the demand **PPM Tool Requirements Definition / RFI Development** from the list
3. In the Demand Cost Plans related list, click **New**.
4. Fill in the fields on the demand form, as appropriate (see table).

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5. Click **Submit**.

Demand – Cost Plan #1

Field	Description	Value
Name	Provide a descriptive name for the cost plan.	**Software License**
Cost type	Select the cost type. See Create a cost type definition.	**Software Capex**
Start fiscal period	Choose a starting fiscal period.	**FY16: Aug**
End fiscal period	Choose an ending fiscal period.	**FY16: Oct**
Quantity	Enter the quantity of resources required.	**100**
Task	Review the demand number.	[Read-only]
Currency	Select a currency type.	**USD**
Total Cost	Review the total cost. If the cost is recurring, the calculation is Quantity x Unit cost value x number of fiscal periods. If the cost is non-recurring, the cost is Quantity x Unit cost value This value is rolled up from the cost breakdown.	[Read-only]
Unit cost	Enter the cost of single unit of the resource.	**75**
Recurring	Select the check box if the cost is recurring for each fiscal period. Quantity x Unit cost value will be incurred for every fiscal period.	**Check**

Note: Remember to click **Submit**.

1. Create another Demand Cost Plan.
2. In the Demand Cost Plans related list, click **New**.
3. Fill out the form fields (see table).

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4. Click **Submit**.

Demand – Cost Plan #2

Field	Description	Value
Name	Provide a descriptive name for the cost plan.	**Time Software**
Cost type	Select the cost type. See Create a cost type definition.	**Software Opex**
Start fiscal period	Choose a starting fiscal period.	**FY16: Dec**
End fiscal period	Choose an ending fiscal period.	**FY16: Dec**
Quantity	Enter the quantity of resource required.	**1**
Task	Review the demand number.	[Read-only]
Currency	Select a currency type.	**USD**
Total Cost	Review the total cost. If the cost is recurring, the calculation is Quantity x Unit cost value x number of fiscal periods. If the cost is non-recurring, the cost is Quantity x Unit cost value This value is rolled up from the cost breakdown.	[Read-only]
Unit cost	Enter the cost of single unit of the resource.	**1550**
Recurring	Select the check box if the cost is recurring for each fiscal period. Quantity x Unit cost value will be incurred for every fiscal period.	<Blank>

Note: Remember to click **Submit**.

1. Create another Demand Cost Plan
2. In the Demand Cost Plans related list, click **New**.
3. Fill out the form fields (see table).

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4. Click **Submit** and then click **Update**.

Demand – Cost Plan #3

Field	Description	Value
Name	Provide a descriptive name for the cost plan.	**Servers**
Cost type	Select the cost type. See Create a cost type definition.	**Hardware Capex**
Start fiscal period	Choose a starting fiscal period.	**FY16: Sep**
End fiscal period	Choose an ending fiscal period.	**FY16: Oct**
Quantity	Enter the quantity of resource required.	**5**
Task	Review the demand number.	[Read-only]
Currency	Select a currency type.	**USD**
Total Cost	Review the total cost. If the cost is recurring, the calculation is Quantity x Unit cost value x number of fiscal periods. If the cost is non-recurring, the cost is Quantity x Unit cost value This value is rolled up from the cost breakdown.	[Read-only]
Unit cost	Enter the cost of single unit of the resource.	**2500**
Recurring	Select the check box if the cost is recurring for each fiscal period. Quantity x Unit cost value will be incurred for every fiscal period.	<Blank>

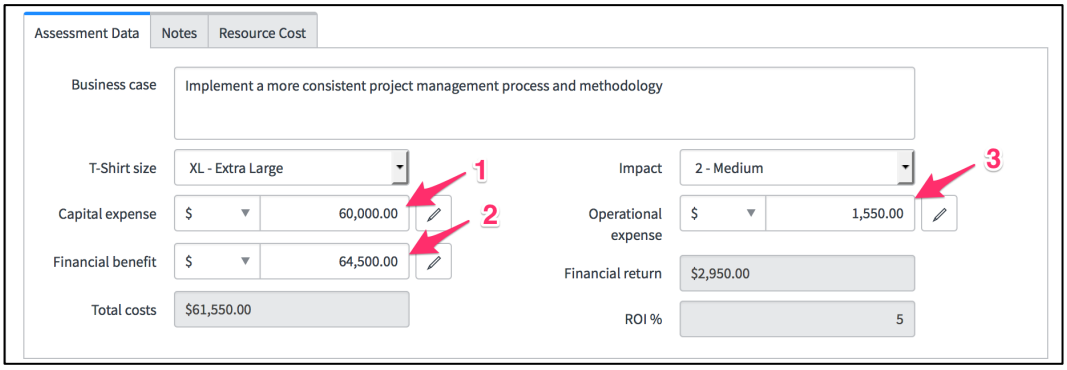
Note: Remember to click **Submit** and then click **Update** on the Demand record.

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Lab Success Verification

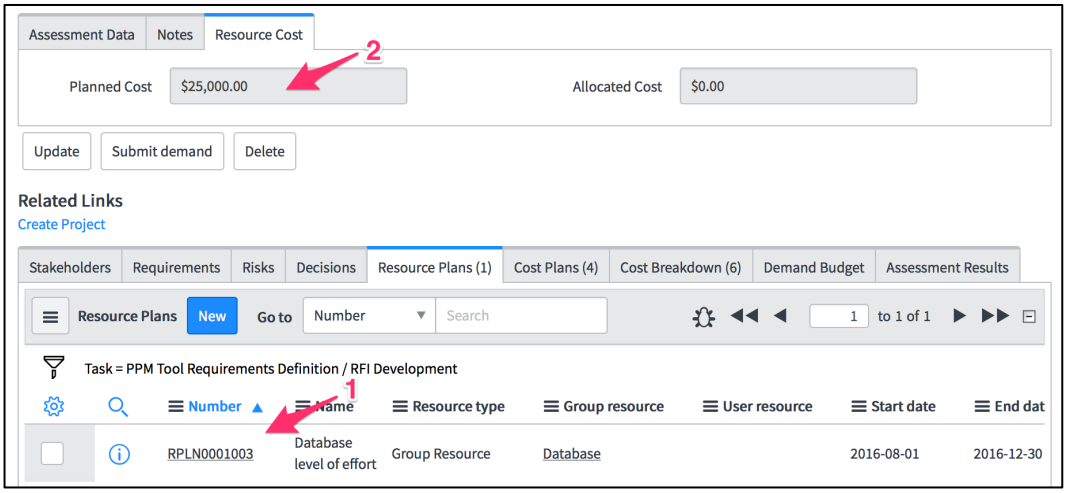
1. Navigate to **Demand** > **Demands** > **All**.
2. Select the demand **PPM Tool Requirements Definition / RFI Development** from the list.
3. On the Demand form you should see that you have the following information:

Assessment Data



1. Capital expense is a rollup from the cost plans that were a cost type of Capex
2. Financial benefit was entered manually
3. Operational expense is a rollup from the cost plans that were a cost type of Opex

Resource Cost



1. The Resource Plan was entered as an exercise
2. The total planned cost of the resource plan is rolled up to the Resource Cost Planned Cost

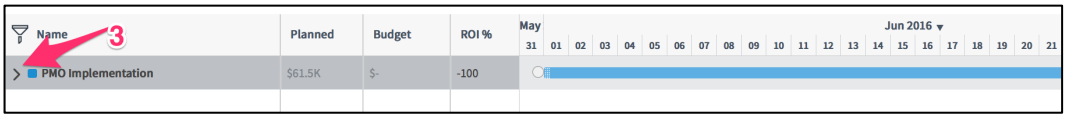
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Program Workbench

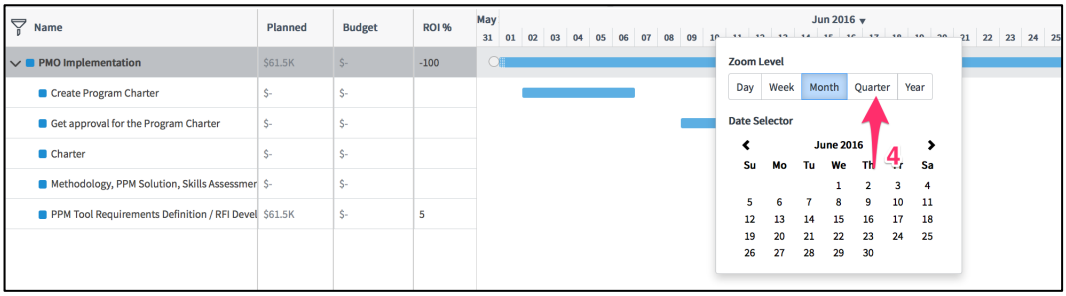
Your screen should look like the examples.

Open the Program Workbench for **PMO Implementation**.

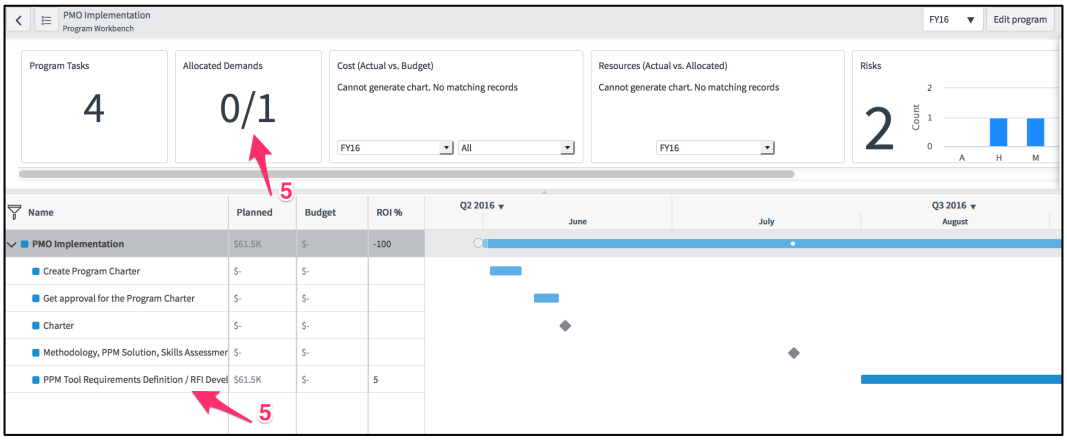
1. Navigate to **Project** > **Programs** > **Workbench**.
2. Select the program "**PMO Implementation**" from the list.
3. On the Program time line expand the program to see the lists of tasks and demand.



4. Also on the Program time line, change the time scale by clicking on the label for either the month, quarter, year- **Change to QUARTER**.



5. Demand is showing on the Program Workbench.



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Lab Goal

Lab 3.1 Create Program Project Records

Create Project records that are linked to the Program "Implementing PMO" created above.

- Create a project record and link it to the Program
- Create related cost plan for the project record
- Create a key milestone for the project

Create a Project

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

1. Navigate to **Project > Projects > Create New**.
2. Fill in the fields on the project form, as appropriate (see table).
3. Right-click the form header and select **Save** to save the record.

Project Form

Field	Description	Value
Project Name	The name of the project.	**PMO Governance and Methodology**
Project Manager	The project manager assigned to this project.	**Danny Dales**
Portfolio	The primary portfolio to which this project belongs. A project can belong to multiple portfolios. **Note**: If a project, for which the Portfolio field is not set, is associated to a portfolio using the portfolio form, then the portfolio name gets populated in the Portfolio field. If a portfolio is deleted, the portfolio name is removed from the Portfolio field on the Project form.	<Leave blank>

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Field	Description	Value
Program	The program to which the project belongs. **Note:** If the Portfolio field is not set, you can select from the list of all programs in the system. If the Portfolio field is set, you cannot select those programs that belong to the other portfolios.	**PMO Implementation**
Goal	Enter the project goal. You can select only one goal. The goal is derived from the portfolio.	<Leave blank>
Configuration item	The configuration item (CI) affected by this project.	<Leave blank>
Number	A system generated number with a configurable prefix.	<Leave as is>
State	The current state of the project. All new projects begin as Pending and automatically change to Work in progress when you click the Start project button on the Project form. Following are the default states: Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, Closed Skipped.	**Pending**
Percent complete	The percentage of the project that has been completed.	<Leave blank>
Calculation	The type of calculation to use for task dependencies: **Manual:** Parent task dates do not reflect any changes made to dependents or child tasks. **Automatic:** Parent task dates are automatically updated to reflect any changes made to dependents or child tasks.	**Manual**
Description	A detailed description of the project.	**Defining the PMO Governance and Methodology**

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Field	Description	Value
Date tab		
Schedule	The work schedule to be used for this project: The default schedule is an 8-hour work day (from 8 to 12 and 1 to 5). A day is considered as a working day, not a 24-hour day.	**Project Management Schedule**
Planned start date	The intended date the project should begin. This value is set to the earliest time that the project schedule allows. For example, if the project task is created at 3 PM and the default schedule is in use (which has an 8 AM start date), the default task start is 8 AM the next day. **Note**: The planned start date must be within 15 years of the current date. Click the calendar icon and select a date to start this project. Projects do not automatically start on the planned start date. The project actually starts when you click Start project on the Project form.	**2016-07-01**
Planned end date	The intended date the project should end. After you add tasks, this field is calculated from the tasks.	**2016-07-01**
Planned duration	The expected duration of this project. After you add tasks, this field is calculated from the duration of the tasks. The duration also considers the project schedule, accounting for any non-work time in the schedule. For example, if the default schedule is used, with a standard 8-hour work day, a project that starts at 8 AM on July 1 and ends at noon on July 2 is calculated as 1 day and 4 hours, not 28 hours. Any project or project task with no children is restricted to a maximum duration of 1,500 days.	**23**

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Field	Description	Value
Financials tab		
Estimated cost	An estimate of the cost of this project. This value is rolled up from the cost breakdown of the project. If there are no cost plans, the estimated costs of the project tasks are rolled up in this field. You can also enter the value manually. Select a currency icon and enter a value.	<Leave blank>
Budget cost	Budgeted cost for this project. This field is automatically populated from the project budget breakdowns in cost plan breakdown table. When project funds are allocated for a fiscal year, the cost plan breakdown stores the budget allocation for each fiscal period. These amounts are rolled up and stored in the budget cost. Select a currency icon and enter a value if you want to manually enter a value.	<Leave blank>
Notes tab		
Watch list	Allows users to subscribe to project notifications.	<Leave blank>
Work notes list	The list of users to receive email notifications when the work notes on the project are updated.	<Leave blank>
Activity / Work notes	Information about the milestones, impediments, or changes as the project progresses. Enter the notes in the Activity field and click the Work notes button. The text appears in the feed below.	<Leave blank>

Note: Remember to right-click the form header and select **Save** to save the record.

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Create Project Cost Plans

The project manager can create a cost plan from the project related list **Cost Plans**. Project cost plans capture the costs for the project. Create a cost plan to specify the unit cost of a cost type for a fiscal period.

The application automatically creates cost plan breakdown records when you save the cost plan. The cost plan breakdowns are records that specify the estimated and actual costs and the budget at a granular level for specific fiscal periods, such as FY16: April and FY16: May.

1. On the project form for **PMO Governance and Methodology**.
2. Select the **Project Cost Plan related list,** click **New**.
3. Fill in the fields on the demand form, as appropriate (see table).
4. Click **Submit**.

Project – Cost Plan

Field	Description	Value
Name	Provide a descriptive name for the cost plan.	**External Contract Labor**
Cost type	Select the cost type. See Create a cost type definition.	**External Labor Opex**
Start fiscal period	Choose a starting fiscal period.	**FY16:Jul**
End fiscal period	Choose a ending fiscal period.	**FY16:Aug**
Quantity	Enter the quantity of resource required.	**1**
Task	Review the demand number.	[READ ONLY]
Currency	Select a currency type.	**USD**
Total Cost	Review the total cost. If the cost is recurring, the calculation is Quantity x Unit cost value x number of fiscal periods. If the cost is non-recurring, the cost is Quantity x Unit cost value. This value is rolled up from the cost breakdown.	[Read Only]
Unit cost	Enter the cost of single unit of the resource	**750**

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Field	Description	Value
Recurring	Select the check box if the cost is recurring for each fiscal period. Quantity x Unit cost value will be incurred for every fiscal period.	**Check**

Note: Remember to click **Submit**.

1. Create another Project Cost Plan.
2. In the Project Cost Plan related list, click **New**.
3. Fill out the form fields (see table).
4. Click **Submit**.

Project – Cost Plan #2

Field	Description	Value
Name	Provide a descriptive name for the cost plan.	**Hardware - Network**
Cost type	Select the cost type. See Create a cost type definition.	**Hardware Opex**
Start fiscal period	Choose a starting fiscal period.	**FY16:Aug**
End fiscal period	Choose an ending fiscal period.	**FY16:Oct**
Quantity	Enter the quantity of resource required.	**7**
Task	Review the demand number.	[READ ONLY]
Currency	Select a currency type.	**USD**
Total Cost	Review the total cost. If the cost is recurring, the calculation is Quantity x Unit cost value x number of fiscal periods. If the cost is non-recurring, the cost is Quantity x Unit cost value. This value is rolled up from the cost breakdown.	[Read Only]
Unit cost	Enter the cost of single unit of the resource	**1050**

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Create Project Key Milestone

Create milestones specific to the program. A milestone is a project task with duration of zero (**0**). Use milestones to mark key dates in your project, such as key decision points or approvals. You can create project milestones from the Project form related lists.

1. Navigate to **Project** > **Projects** > **All**.
2. Select the program **PMO Governance and Methodology** from the list.
3. In the Project **Task** related list, click **New**.
4. Mark the project task as a MILESTONE and / or KEY MILESTONE.
5. Click **Submit**.

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Project Milestone

Field	Description	Value
Short description	A brief description of the program task.	**Project Inventory & Analysis**
Number	A system generated number with a configurable prefix.	<Leave as is>
State	The current state of the program. The states include: **Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, Closed Skipped**.	**Pending**
Planned start date	The estimated date and time for the program task to start.	**2016-07-21**
Planned end date	The estimated date and time for the program task to end.	<Leave as is>
Planned duration	The estimated length of time (from start time to end time) of the program task.	<Leave as is>
Assigned to	The user assigned to the program task.	**Danny Dales**
Milestone	A milestone is a program task with a duration of zero (0). Use milestones to mark key dates in your program, such as key decision points or approvals.	**Check**
Key milestone	You can define a milestone as a key milestone to track the program progress. For example, you can create key milestone for completion of deliverables such as a program plan. A key milestone is visible on the program timeline.	**Check**
Description	A detailed description of the program task.	**Compete & approved**
Additional comments (Customer visible)	Enter information that you want the users to see.	**<Leave blank>**
Work notes	Enter work notes about the milestones, impediments, or changes as the program progresses.	**<Leave blank>**

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Lab Success Verification

1. On the Project form you should see that you have the following information:

   Financials



2. Total from both project cost plans

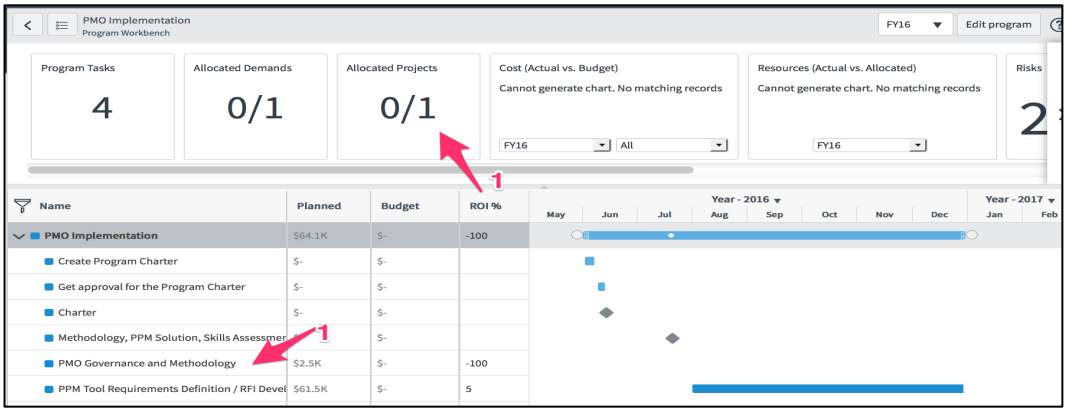
   Program Workbench

3. Your screen should look like the example.

4. Open the Program Workbench for PMO Implementations..

5. Navigate to **Project > Programs > Workbench**.

6. Select the program "**PMO Implementation**" from the list.



7. Projects are showing on the Program Workbench.

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Lab Goal

Lab 3.1 Review Program

Review Program Workbench. The program workbench provides a central location for viewing the details of a program and the projects, demands, and program tasks that are part of it.

- Configure the Program Workbench
- Features of Program Workbench

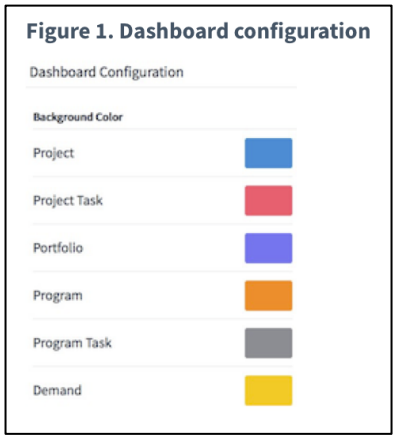
Configure the Program Workbench

When you access the program workbench, the Programs workbench dashboard, displays a list of all the programs

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

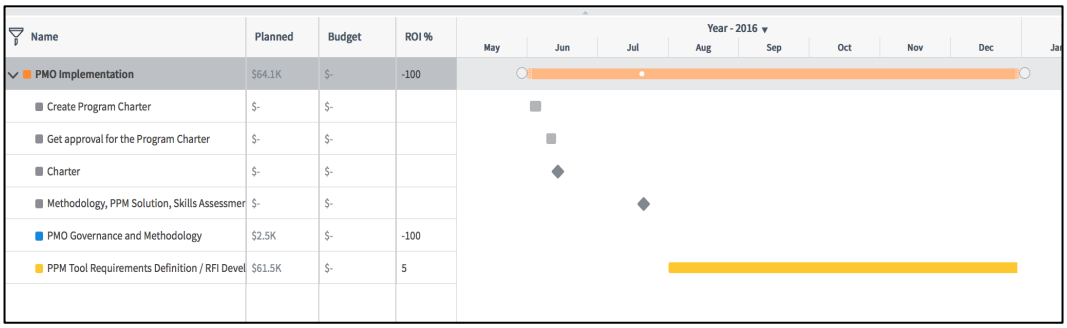
2. Click the configuration icon and select the colors for projects, tasks, programs, and so on. The workbench uses these colors to display the items in the program in the Gantt chart at the bottom of the workbench.

Figure 1. Dashboard configuration



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3. From the Programs list, click on the program.



Features of Program Workbench – Timeline

1. Hover over key milestones to see the Tool Tip.
2. Select the **PMO Implementation** Name to slide in the program form:

   You can View or modify the program record from the slide in

   Look at the Cost Plans on the Program – all cost plans will be on the Program – the ones from Demand & Project
3. Select a Project or a Demand to slide the record's form.
4. Click the **funnel** icon to select different columns to be viewed.

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Appendix

Resource Pages:

Program Management:

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/program_management/concept/c_ProgramManagement.html

Create a Program:

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/program_management/task/t_CreateAProgram.html

Create a Program Task:

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/program_management/task/t_CreateAProgramTask.html

Access the Program Workbench

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/program_management/task/t_AccessTheProgramWorkbench.html

Demand Management

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/planning_and_policy/concept/c_DemandManagement.html

Create Demands

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/planning_and_policy/task/t_CreatingDemands.html

Create a Demand Cost Plan

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/planning_and_policy/task/t_CreateADemandCostPlan.html

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Project Management

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/project_management/concept/c_ProjectApplicationOverview.html

Create a Project

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/project_management/task/t_CreateAProject.html

Create a Project Task / Milestone

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/project_management/task/t_CreateAProjectTask.html

Create a Project Cost Plan

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/project_management/task/t_CreateAProjectCostPlan.html

Create a Resource Plan

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/resource_management/task/t_CreateResourcePlanProjectTask.html

Project and Portfolio Funding

https://docs.servicenow.com/bundle/helsinki-it-business-management/page/product/project_portfolio_suite_with_financials/concept/c_ProjectAndPortfolioFunding.html

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