knowledge14
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Lab Guide

Project and Portfolio Management 101:

Create your first project

Emily McMullin & Molly Feterl

Lab instance: https://**<<name>>**.lab.service-now.com/

Login / Passwords:

admin / **Knowledge14**

itil / Knowledge14

employee / Knowledge14

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Lab Goal 1

ServiceNow's Project Management application has the capability to integrate with Financial Management for estimated and actual cost. Also project tasks can be can be displayed in the Work Breakdown Structure (WBS) format within the Gantt chart.

This lab explains how to:

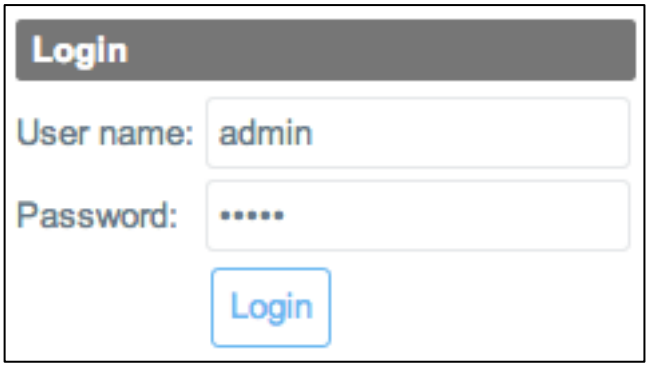
- review Project Properties
- add two related lists to the project form

Lab 1
Setup
Project

Log on to Your Lab Instance

1. Your instance URL is on the cover page.

2. Login using the **admin** credentials provided on the cover.



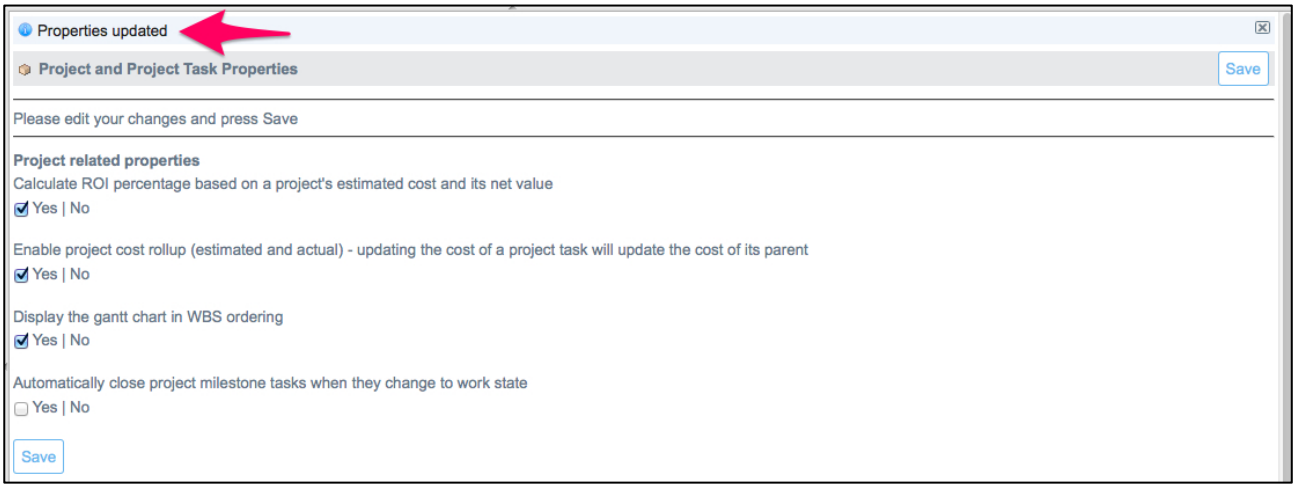
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Project Properties

1. Navigate to **Project > Administration > Properties**. Change (select) the following properties to be YES, as necessary.
    - Calculate ROI percentage based on a projects estimated cost and its net value
    - Enable project cost rollup (estimated and actual) – updating the cost of a project task will update the cost of its parent
    - Display the Gantt chart in WBS ordering
2. Click **SAVE**.

Lab Success Verification

Your screen should look like the example below:



Additional information:
http://wiki.servicenow.com/index.php?title=Installed_with_Project_Management

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Lab Goal 2

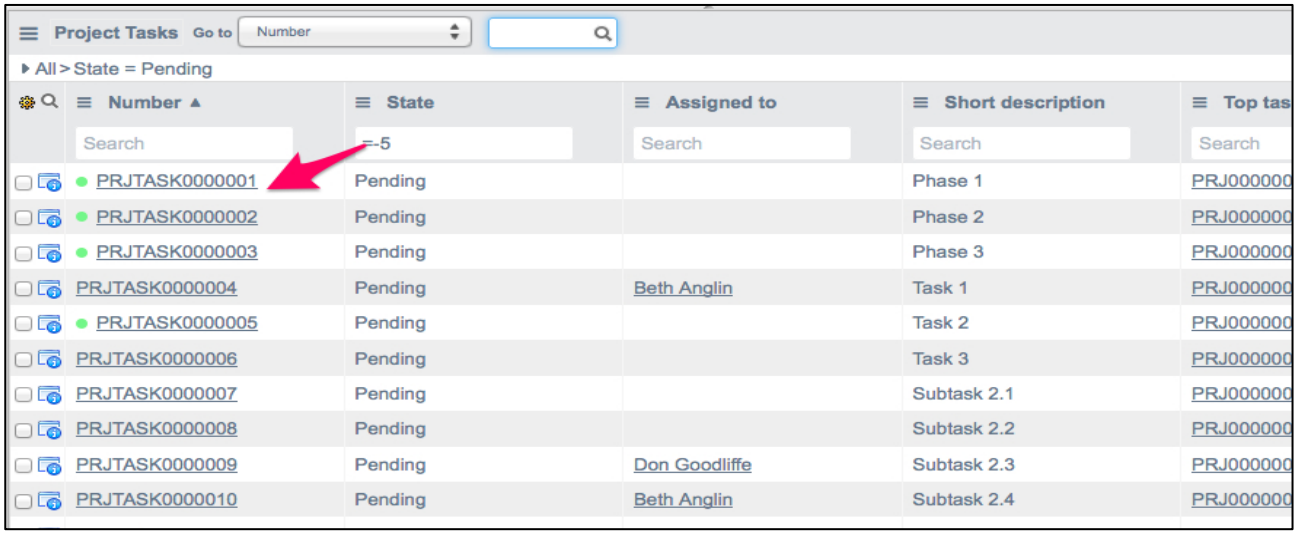
This lab explains how to add two related lists to the Project Task form to be used in an up-coming lab to add dependencies between project tasks.

Lab 2 Project Task Related Lists

Add Two Related Lists to Project Task Form

1. Navigate to **Project > Projects Tasks > Pending**.

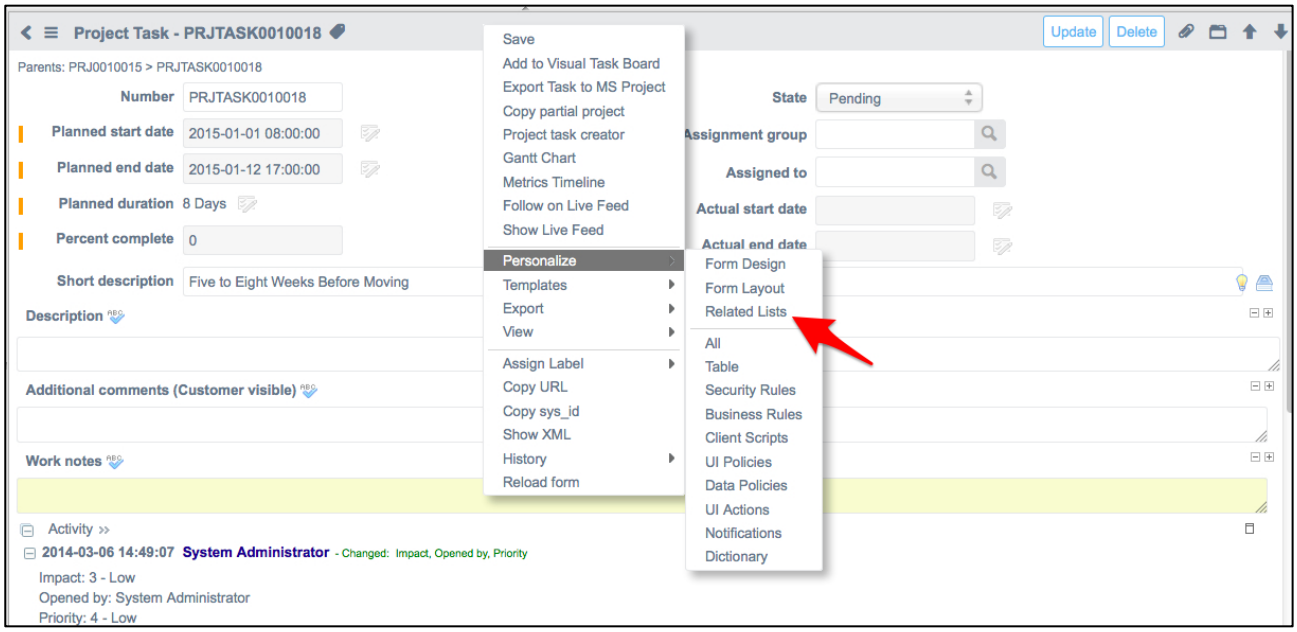
2. On the **Pending Project task** list in the right panel, select any **project task Number** from the list.



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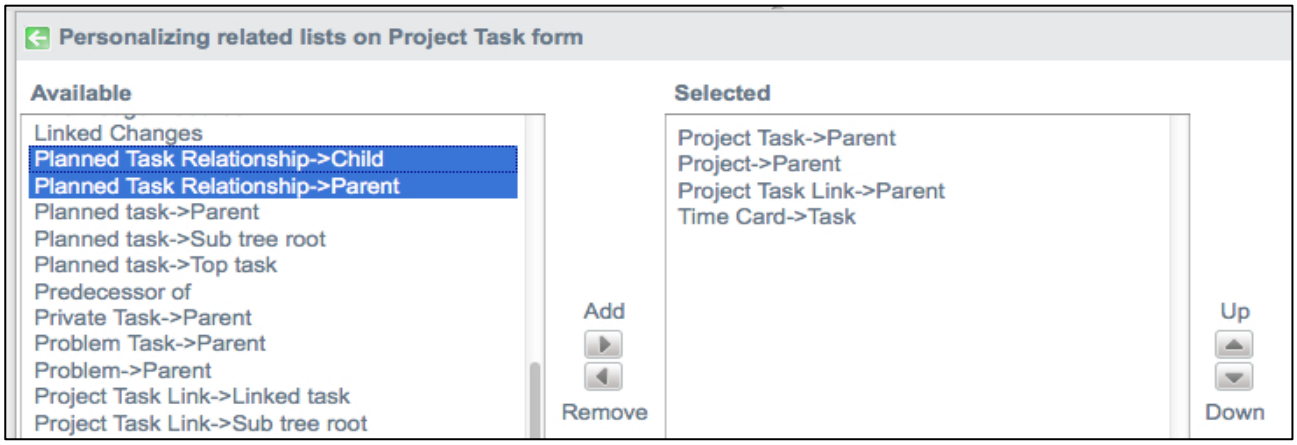
3. On the project task form, **right-click** the Project Task header.

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



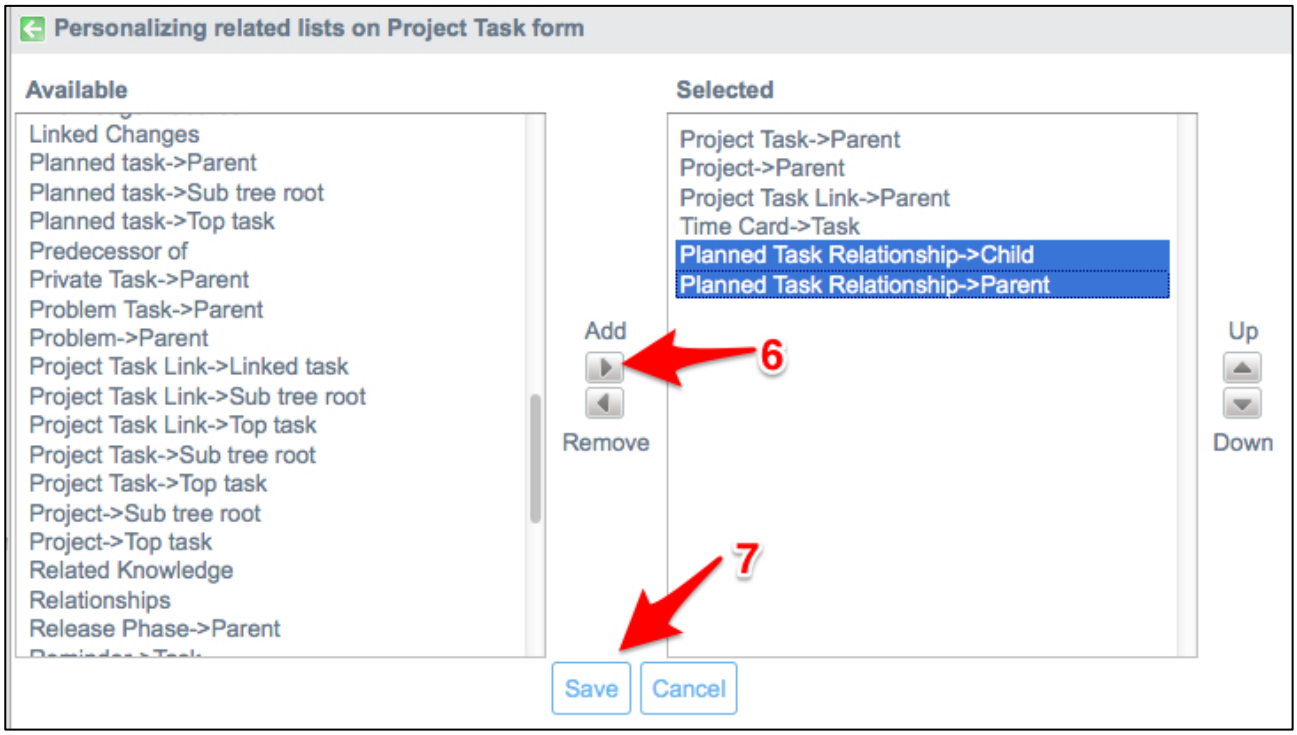
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5. In the **Available** slush bucket, select **Planned Task Relationship->Child** and **Planned Task Relationship->Parent**.



6. Click **ADD**.

7. Click **SAVE**.

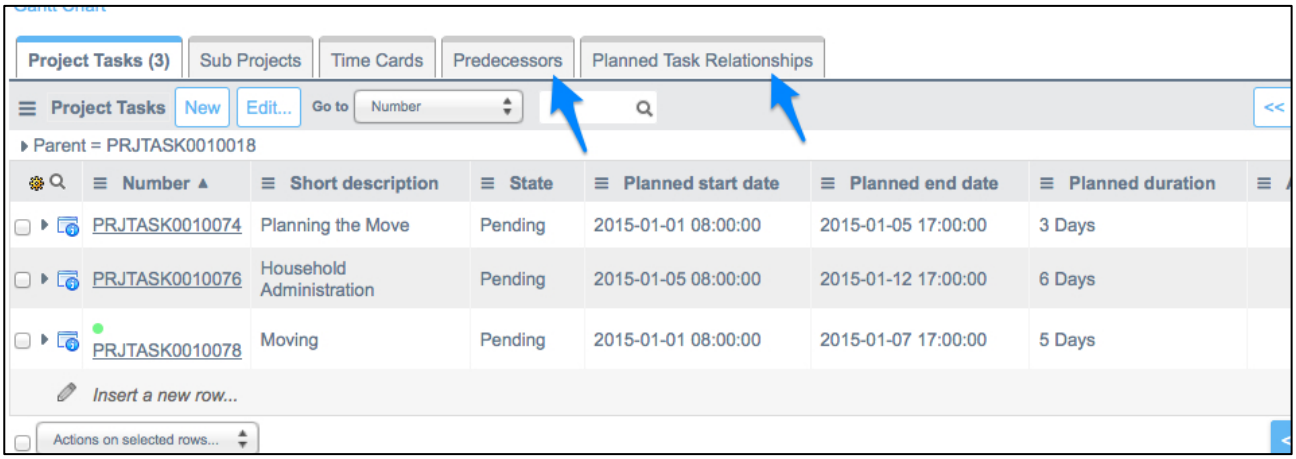


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Lab Success Verification

On the Project Task Form scroll down to the related list area, you should see the two project task-related lists have been added.

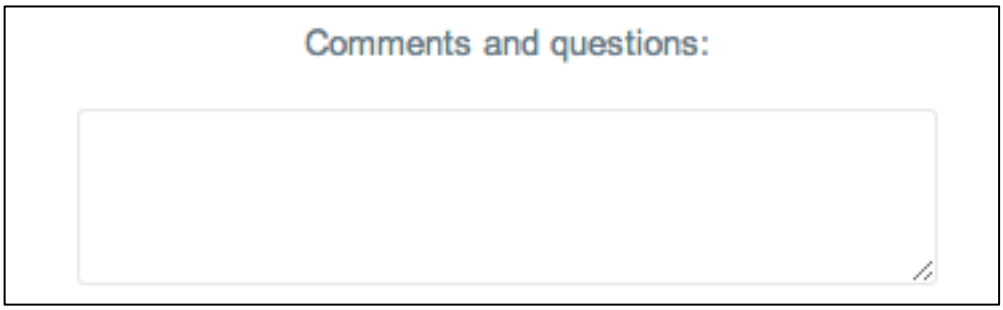
Your screen should look similar to the one below:



1. Click **UPDATE** on the project task form to return to a project task list.

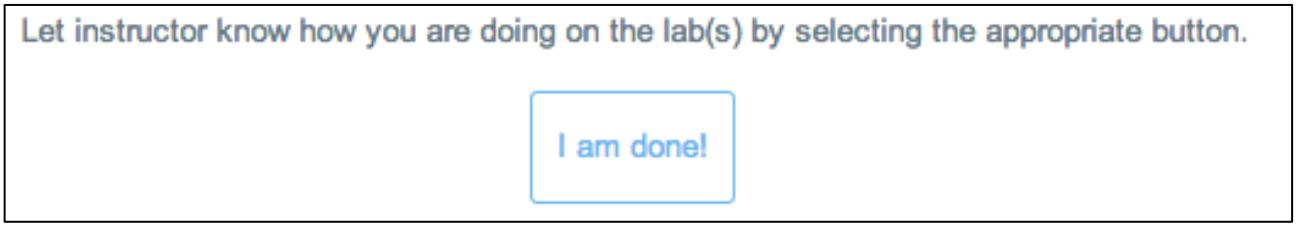
2. Click the **Lab Management > Report Lab Progress Edge** icon.

3. Enter any comments regarding this lab.



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4. In the main window, click **I am done!**



NOTE: In subsequent labs, use Report Lab Progress to inform the instructors when you need assistance or when you have completed a lab. Feedback is encouraged and appreciated!

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Lab Goal 3

An organization will have one or more mechanisms to capture new projects (demand/ideas). This lab explains how to request a project by using the ServiceNow Self Service Portal. The lab also explains how to create another project using the ServiceNow Project Management Application.

Lab 3
Propose a Project

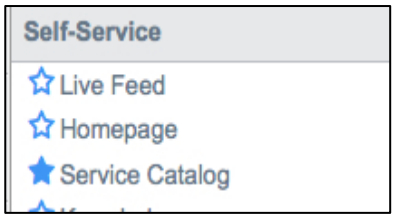
Log on to Your Lab Instance

1. Your instance URL is on the cover page.

2. Login using the **admin** credentials provided on the cover

Propose a Project

1. Navigate to **Self-Service > Service Catalog**.



2. On the portal page in the right side pane, **Select Can We Help You?**

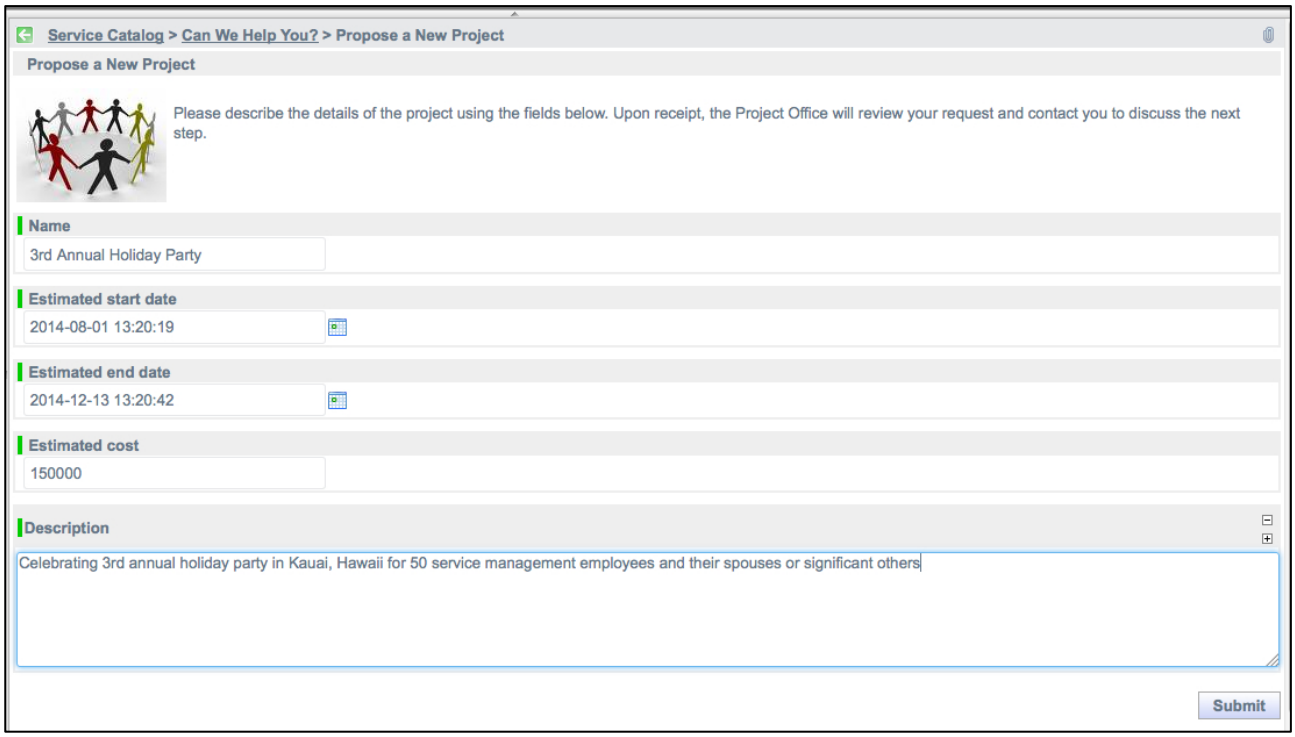
3. Scroll down and select **Propose a New Project**

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4. Populate the service catalog request as follows:

   Name: **3rd Annual Holiday Party**
   Estimated start date: **2014-08-01** (time will not matter)
   Estimated end date: **2014-12-13** (time will not matter)
   Estimated Cost: **150,000**
   Description: **Celebrating 3rd annual holiday party in Kauai, HI for 50 service management employees and their spouses or significant others**

5. Your screen should be similar to the screen below:



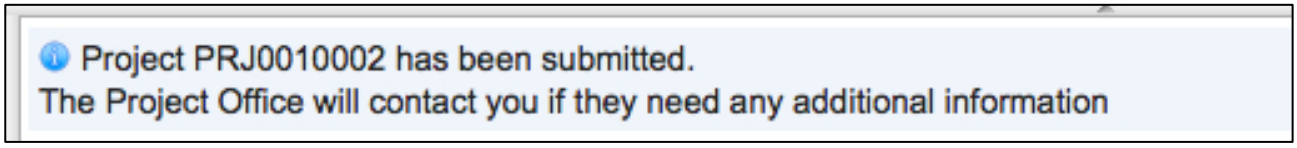
6. When finished populating the Propose a New Project request, click **SUBMIT**.

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Lab Success Verification

You should get a message letting you know the project number for your proposed project.

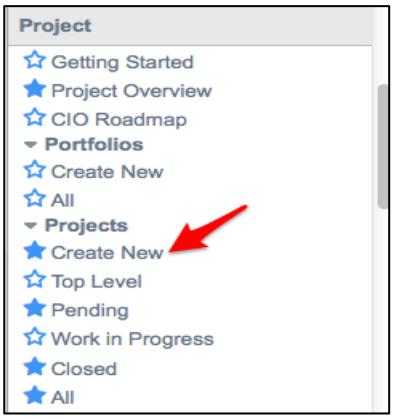
1. The screen should be similar to the screen below:



Create a New Project

This lab explains how to create a new project from within the Project Management Application in ServiceNow.

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

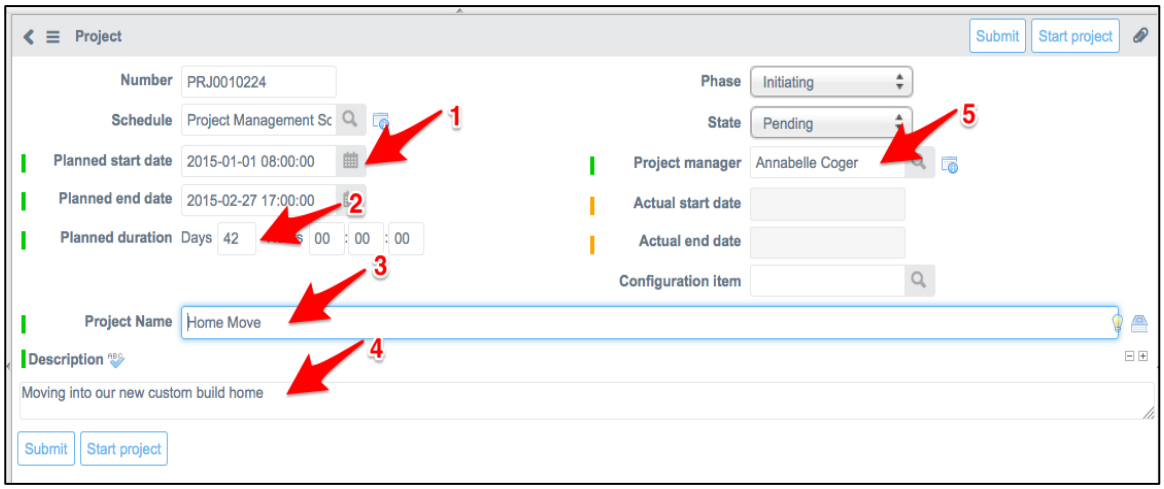


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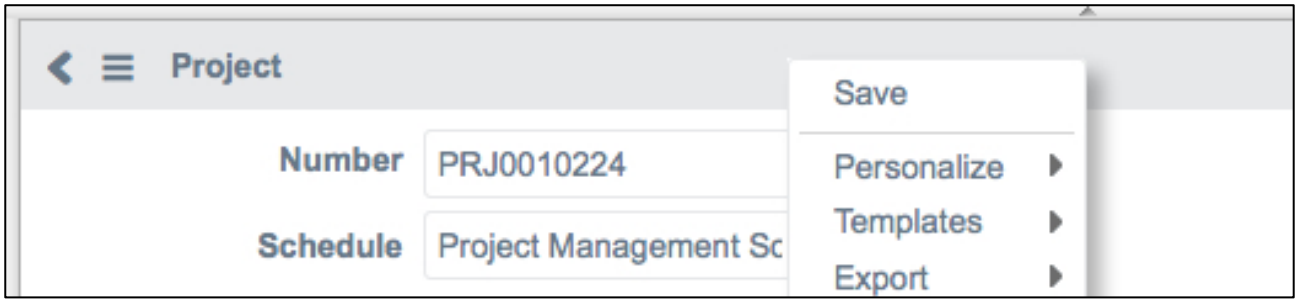
2. Populate the project form as follows:

   (Step 1) Planned start date: **2015-01-01 08:00:00**
   (Step 2) Planned duration: **42**
   (Step 3) Project Name: **Home Move**
   (Step 4) Description: **Moving into our new custom built home**
   (Step 5) Project Manager: **Annabelle Coge**

   Note: the planned end date has been updated to 2015-02-27 17:00:00



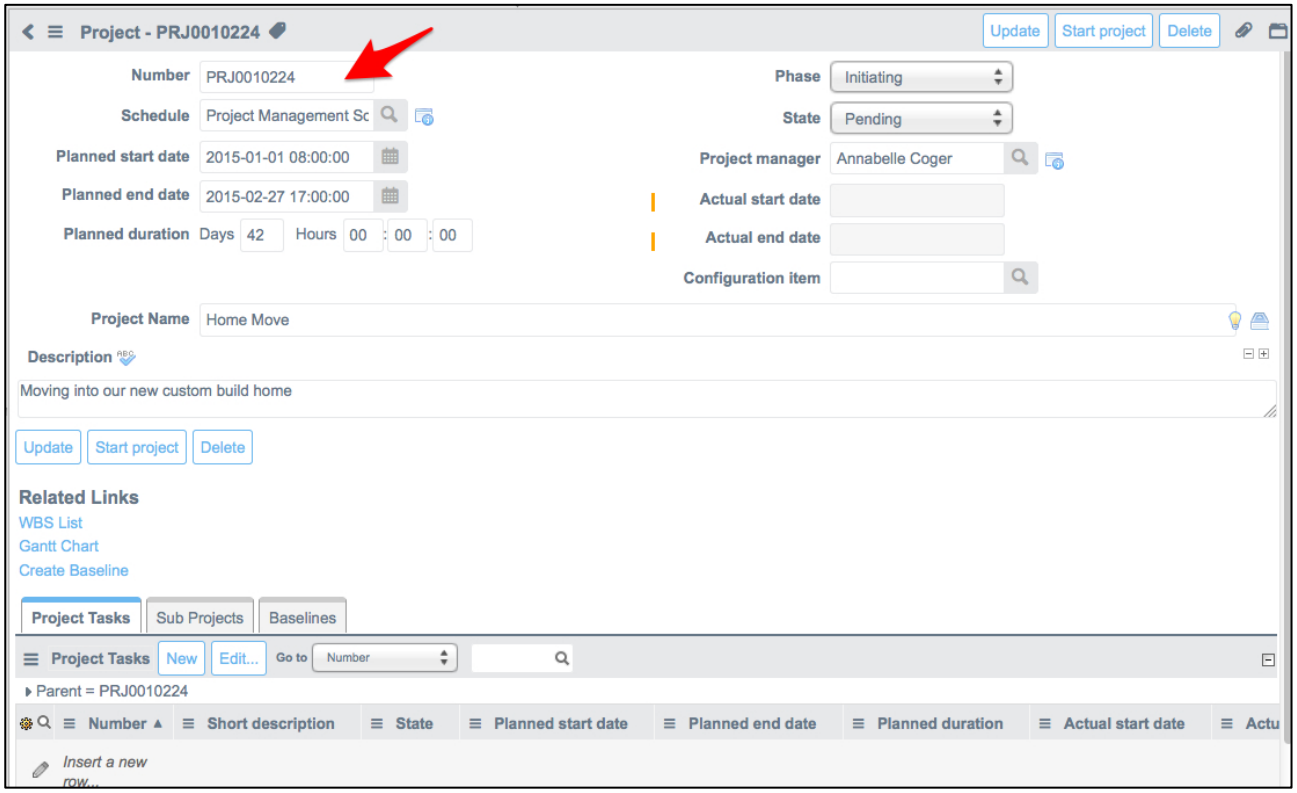
3. Right-click the project form header and click **SAVE**.



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Lab Success Verification

1. Your project form should look similar to the one below. You will have a different project number.



Write down your Project Number _____

Additional information: http://wiki.servicenow.com/index.php?title=Creating_a_Project

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Lab Goal 4

This lab explains how to add phases, tasks and subtasks to the project HOME MOVE created in Lab 3.

At this time in your project, you would decide whether to focus on top-down planning or bottom-up planning. It is also easiest to build task relationships and dependencies while creating sets of tasks.

This lab is split into three separate exercises (labs):

- **Create high-level Project Tasks as Project Phases**
- Add Project Tasks to the Project Phases
- Add Project Subtasks to Project Tasks with Dependencies

Lab 4.1 Add Project Phases

Creating Project Phases

If you closed the project created in the previous lab, start at step **1**, otherwise go to step **3**.

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

2. Select the **Number** for the HOME MOVE project you saved in Lab 3.

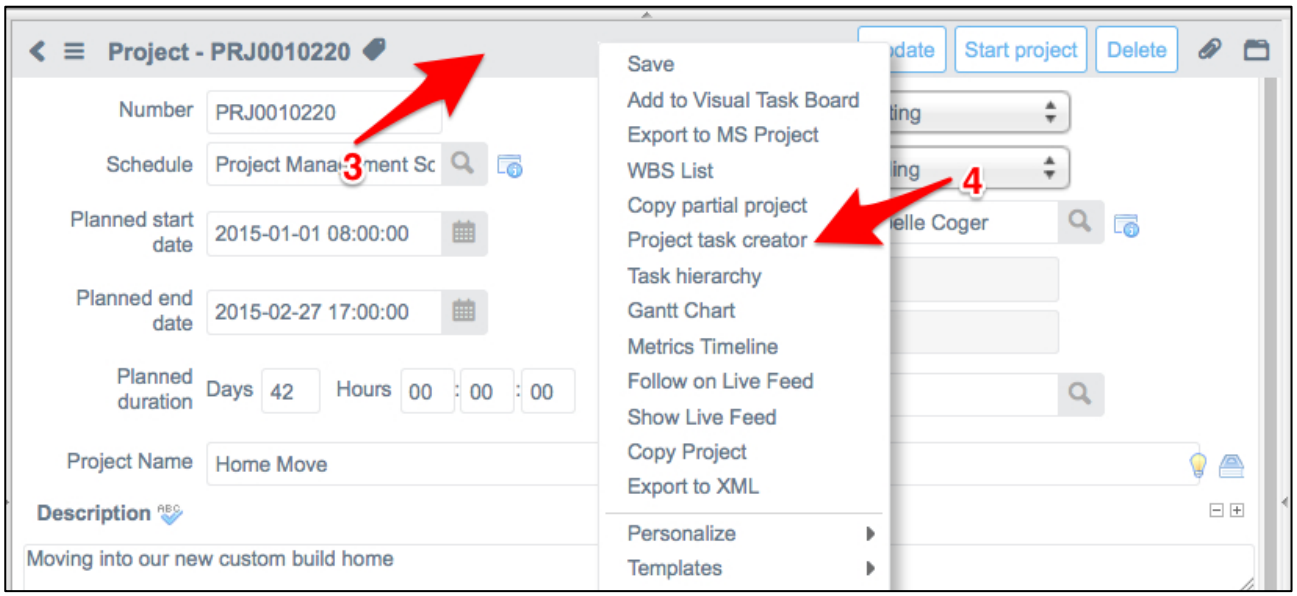
NOTE: This should be the project number you wrote down in the previous lab.

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To add **5 phases** to your "HOME MOVE" project:

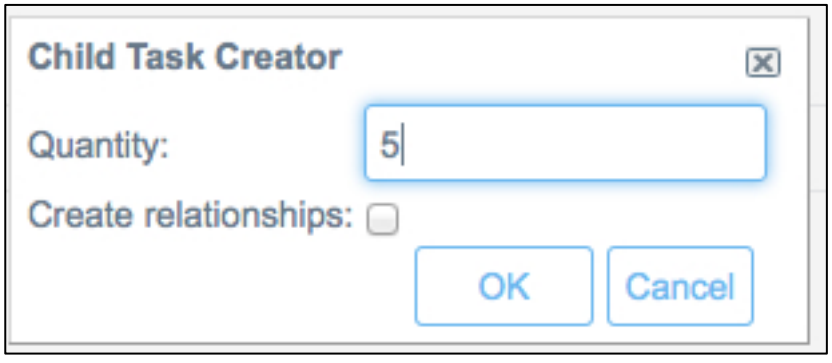
3. **Right-click** the Project form header.

4. Select **Project Task Creator** from the drop-down list.



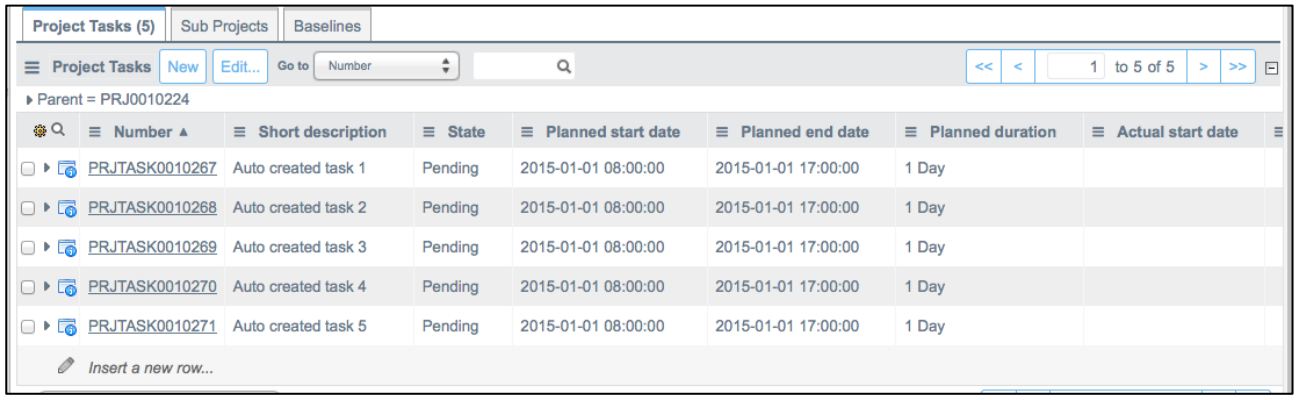
5. In the Child Task Creator, enter **5** for the **Quantity**.

6. Click **OK**.



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The Project Task related list should look similar to the example below.

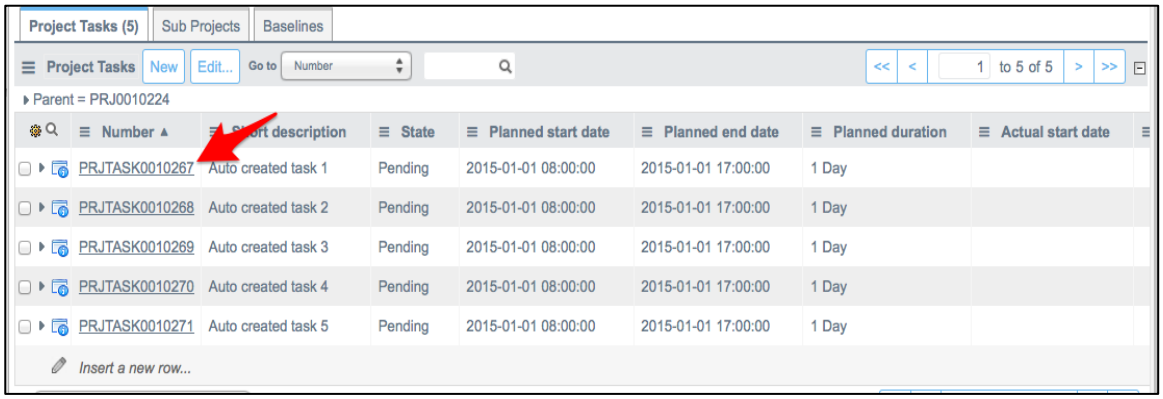


Additional information: http://wiki.servicenow.com/index.php?title=Creating_Project_Tasks

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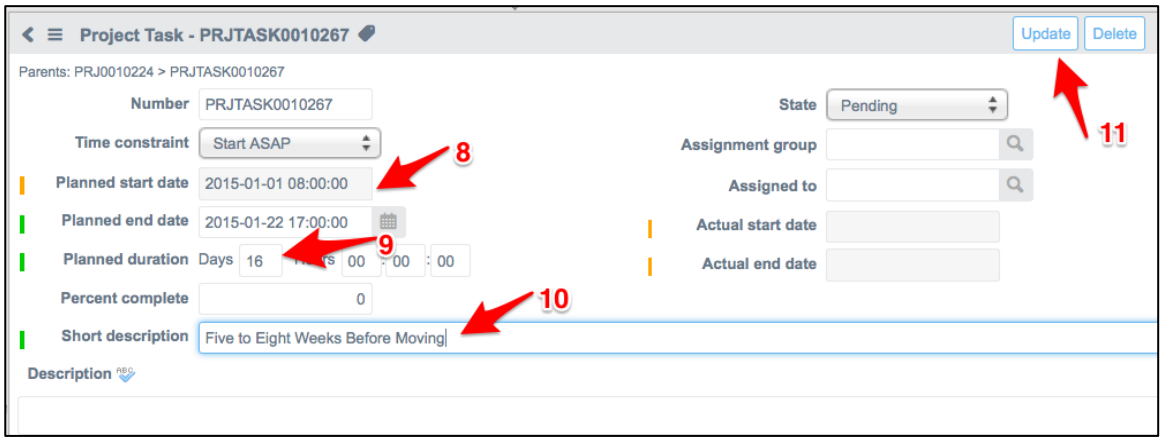
Follow the steps below to add more detail to the auto created tasks.

7. In the Project Task related list, click **NUMBER** field where the Short Description is **Auto create task 1**.



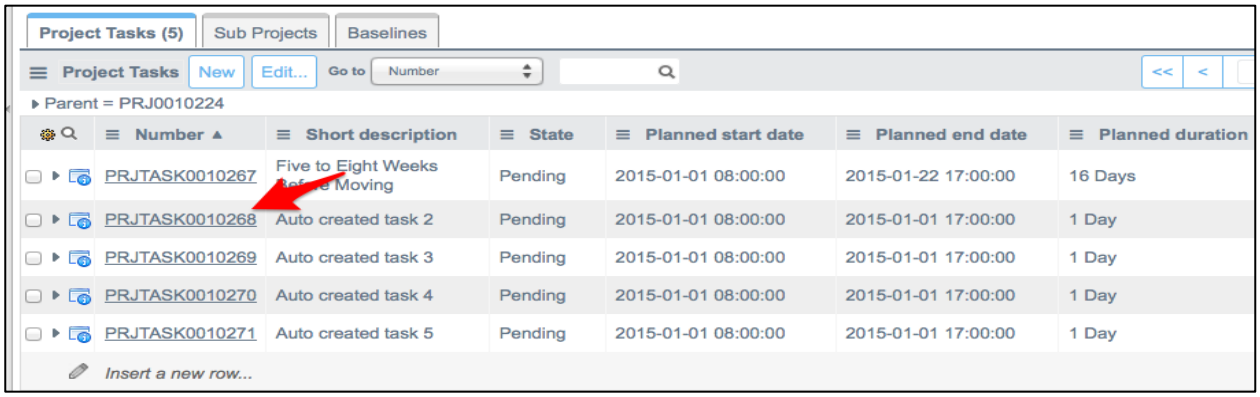
8. On the Project Task Form populate the following fields:

(Step 8) Verify the Planned Start Date: **2015-01-01 08:00:00**
(Step 9) Change the Planned duration: **16**
(Step 10) Change the Short Description: **Five to Eight Weeks Before Moving**
(Step 11) Click **UPDATE**.



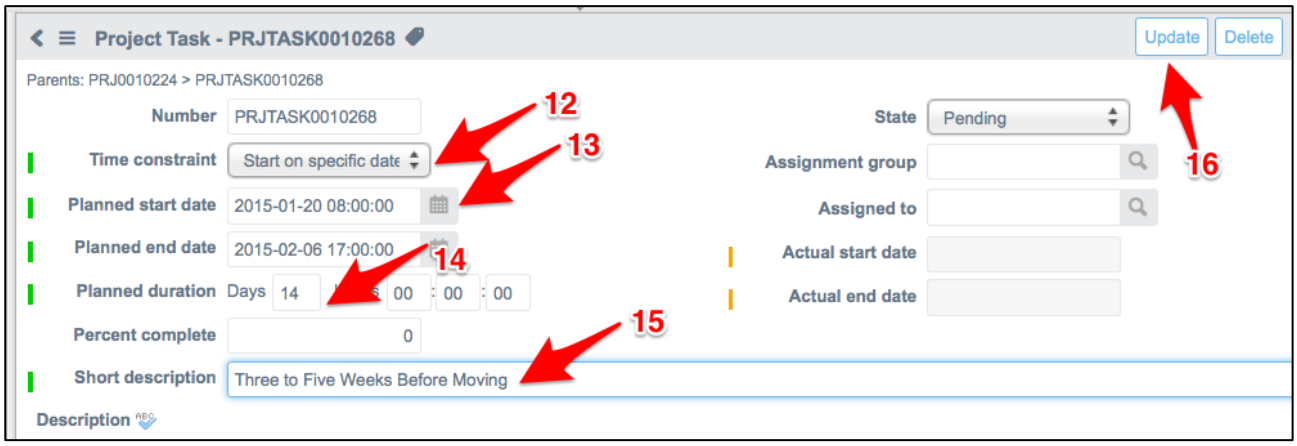
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9. In the Project Task related list, click **NUMBER** field where the Short Description is **Auto create task 2**.



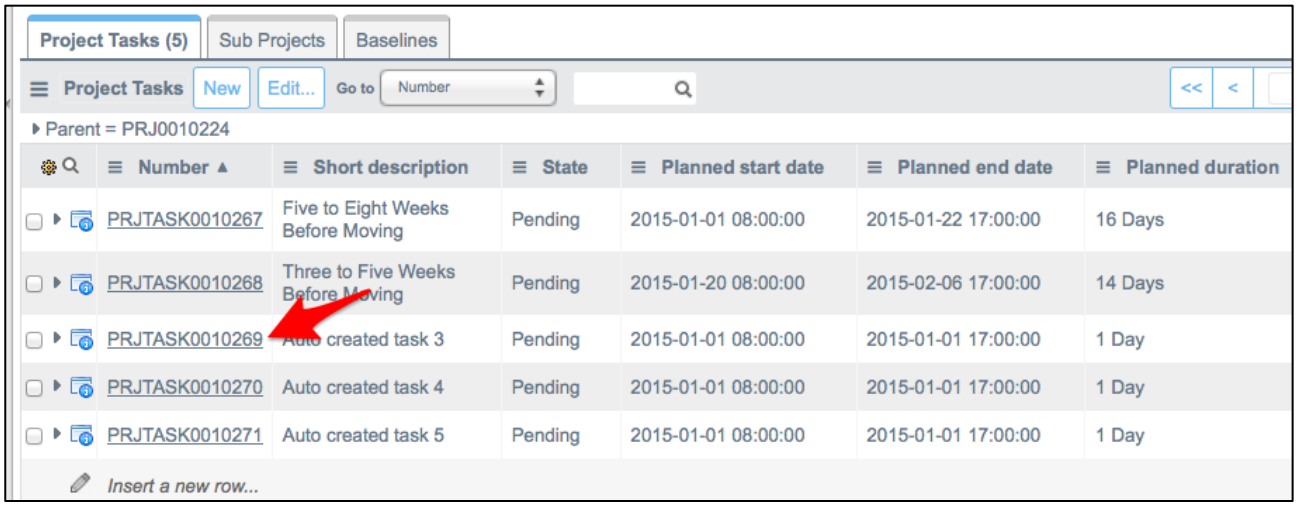
10. On the Project Task Form change the following fields:

(Step 12) Time constraint: **Start on specific date**
(Step 13) Planned start date: **2015-01-20 08:00:00**
(Step 14) Planned duration: **14**
(Step 15) Short description: **Three to Five Weeks Before Moving**
(Step 16) Click **UPDATE**.



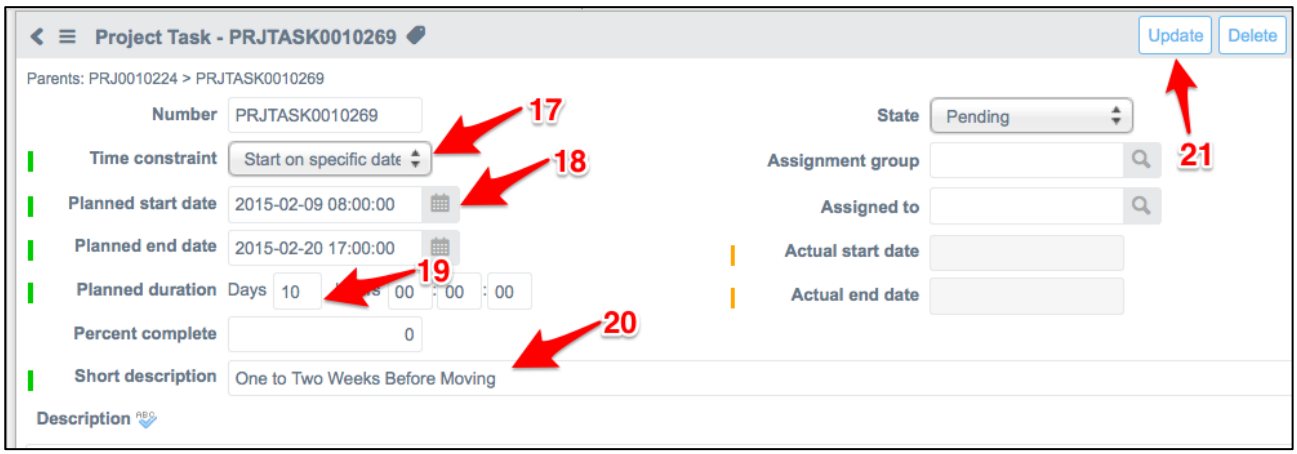
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11. In the Project Task related list, click **NUMBER** field where the Short Description is **Auto create task 3**.



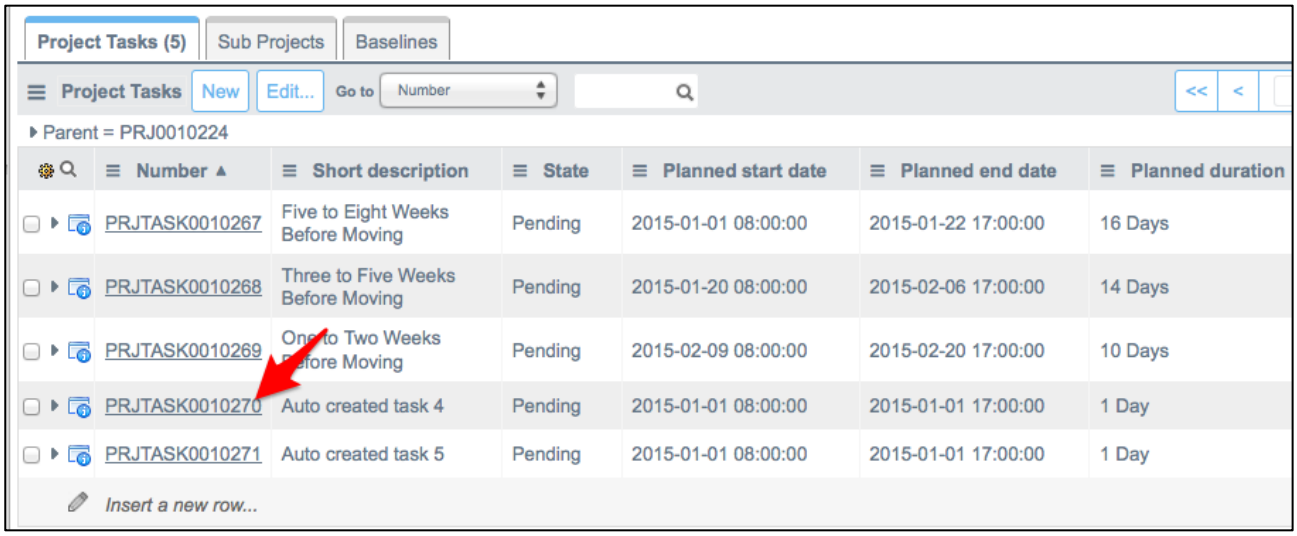
12. On the Project Task Form, change the following fields:

(Step 16) Time constraint: **Start on specific date**
(Step 17) Planned start date: **2015-02-09 08:00:00**
(Step 18) Planned duration: **10**
(Step 19) Short description: **One to Two Weeks Before Moving**
(Step 20) Click **UPDATE**.

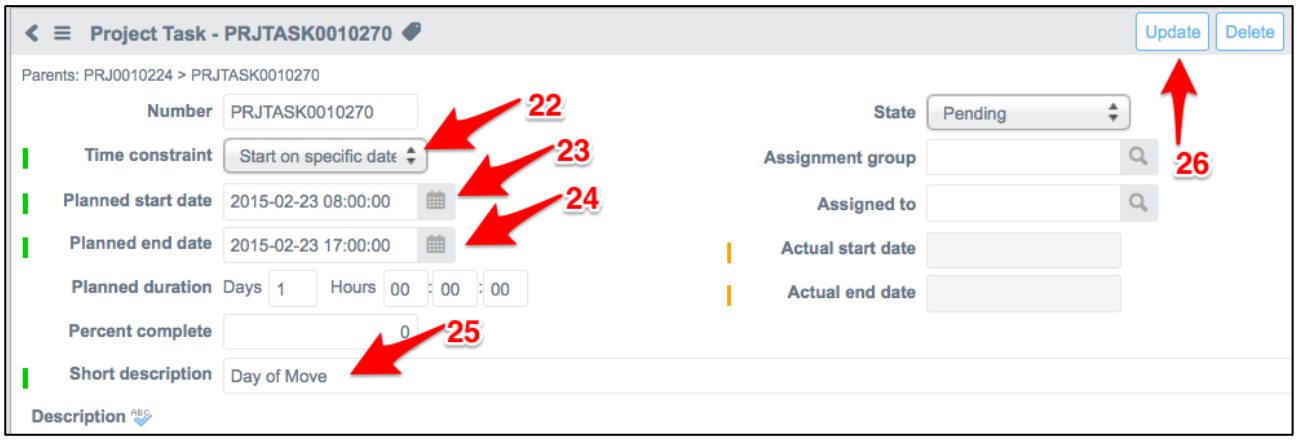


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13. In the Project Task related list, click **NUMBER** field where the Short Description is **Auto create task 4.**

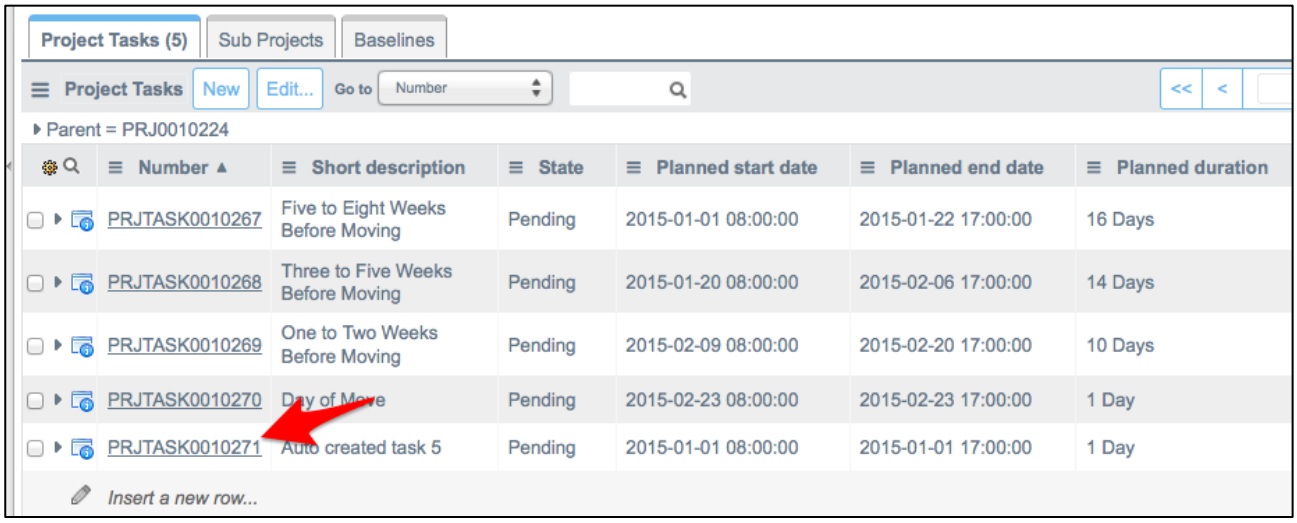


14. On the Project Task Form complete the fields with the following information:
    (Step 22) Time constraint: **Start on specific date**
    (Step 23) Planned start date: **2015-02-23 08:00:00**
    (Step 24) Planned end date: **2015-02-23 17:00:00**
    (Step 25) Short description: **Day of Move**
    (Step 26) Click **UPDATE**.



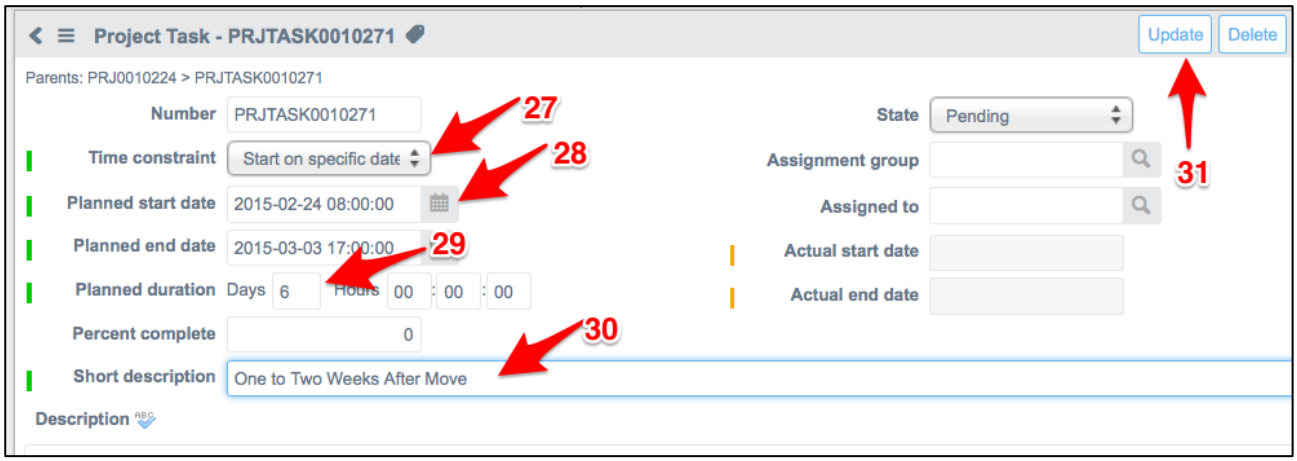
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15. In the Project Task related list, click **NUMBER** field where the Short Description is **Auto create task 5**.



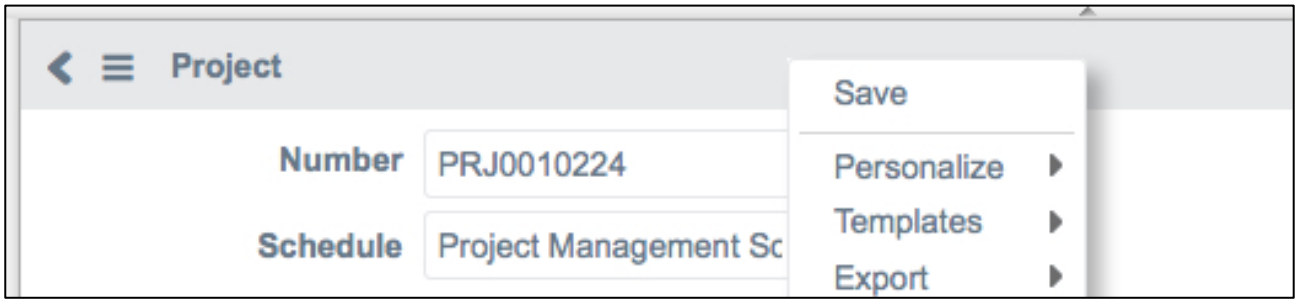
16. On the Project Task Form complete the fields with the following information:

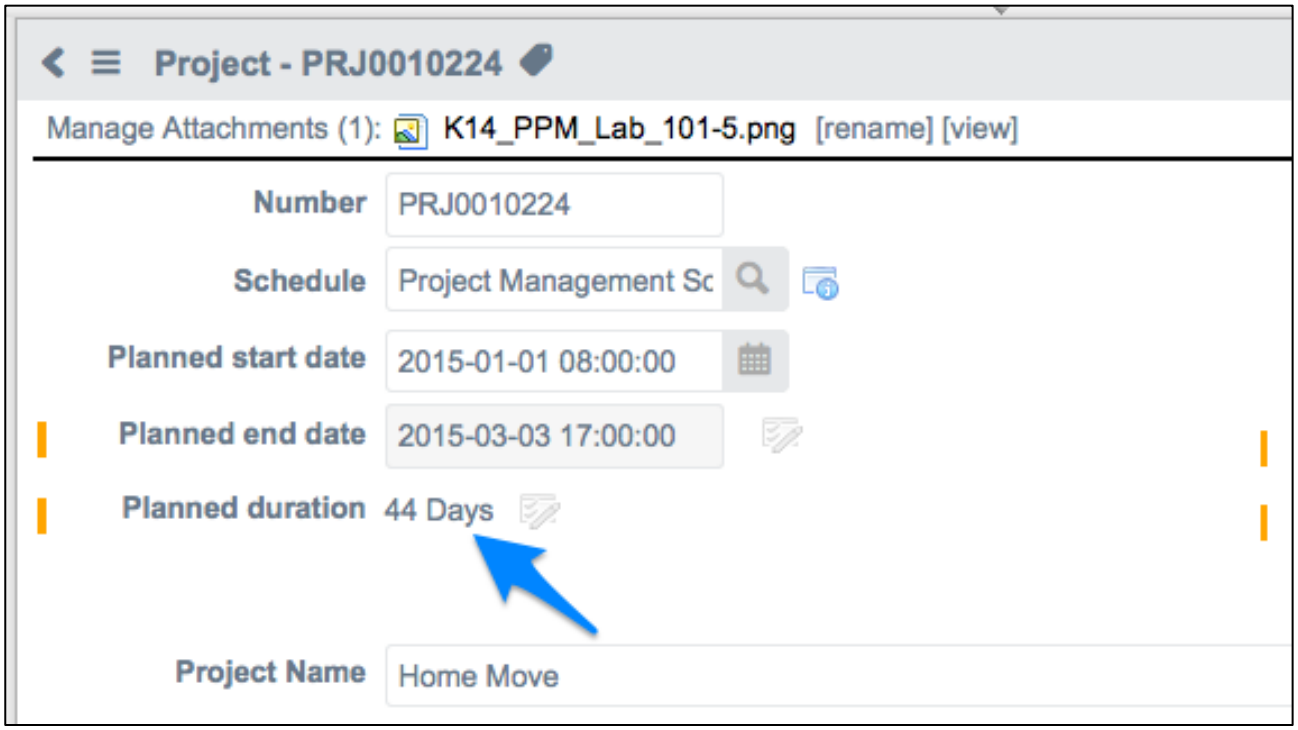
(Step 27) Time constraint: **Start on specific date**
(Step 28) Planned start date: **2015-02-24 08:00:00**
(Step 29) Planned duration: **6**
(Step 30) Short description: **One to Two Weeks After Move**
(Step 31) Click **UPDATE**



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17. On the Project form header, right-click and select **SAVE**.

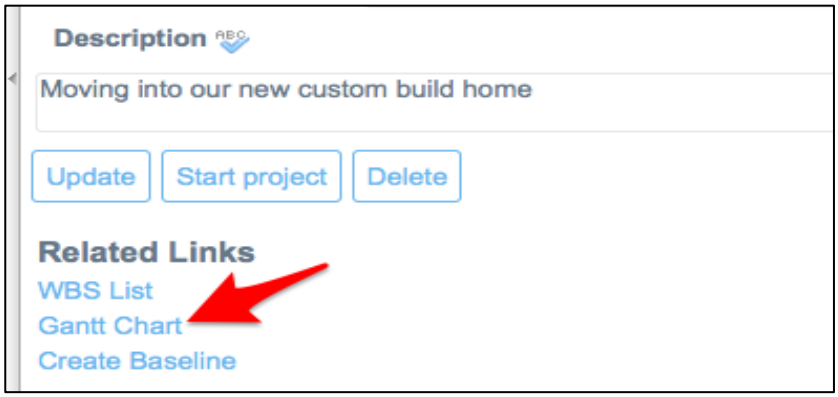


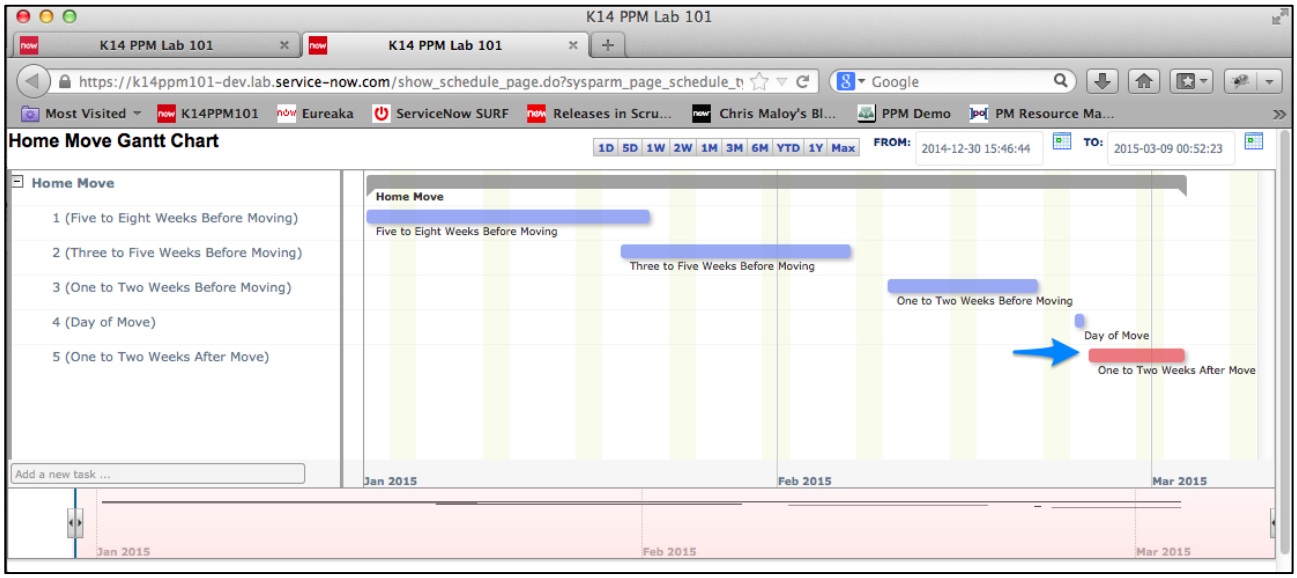


Note: The planned duration changed from **42** days to **44** days**.**

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18. Click the **Gantt Chart** Related Link to view the newly created dependent tasks on the Gantt chart.

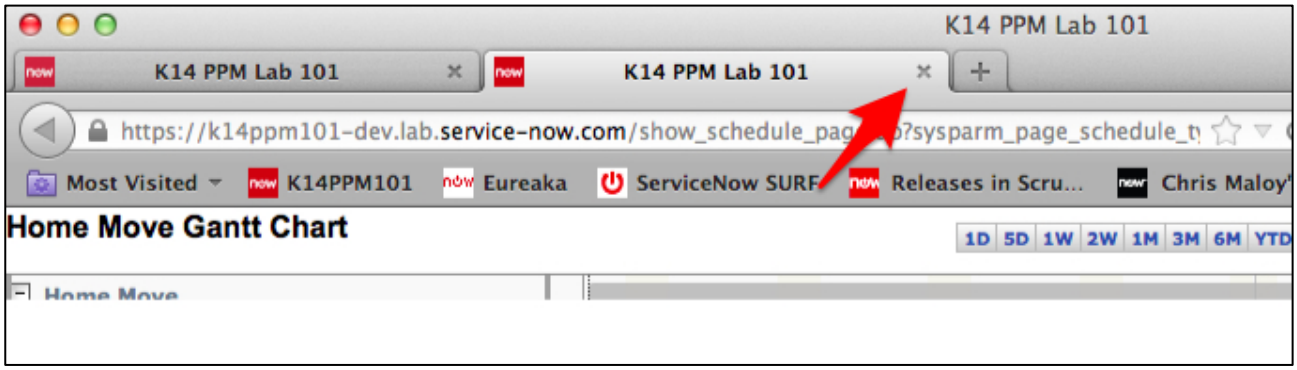




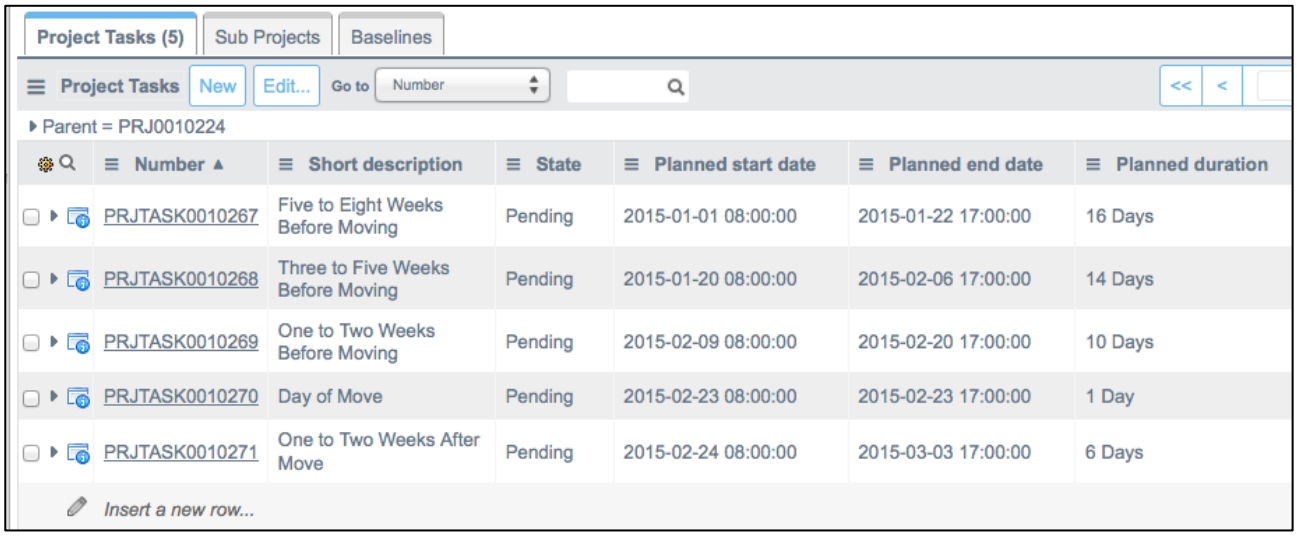
The Gantt chart is a visual representation of the project's timeline. It shows the start and end dates of the Phases we entered. Notice there is one phase that is **RED**: this means it is **Critical Path**.

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19. To close the Gant chart, click the Gantt chart browser **X**.



20. On the **HOME MOVE** Project form, scroll down to the **PROJECT TASK** related list. The project task related list should look similar to the one below:



Number	Short description	State	Planned start date	Planned end date	Planned duration
PRJTASK0010267	Five to Eight Weeks Before Moving	Pending	2015-01-01 08:00:00	2015-01-22 17:00:00	16 Days
PRJTASK0010268	Three to Five Weeks Before Moving	Pending	2015-01-20 08:00:00	2015-02-06 17:00:00	14 Days
PRJTASK0010269	One to Two Weeks Before Moving	Pending	2015-02-09 08:00:00	2015-02-20 17:00:00	10 Days
PRJTASK0010270	Day of Move	Pending	2015-02-23 08:00:00	2015-02-23 17:00:00	1 Day
PRJTASK0010271	One to Two Weeks After Move	Pending	2015-02-24 08:00:00	2015-03-03 17:00:00	6 Days

Insert a new row...

Additional information: http://wiki.servicenow.com/index.php?title=Creating_Project_Tasks

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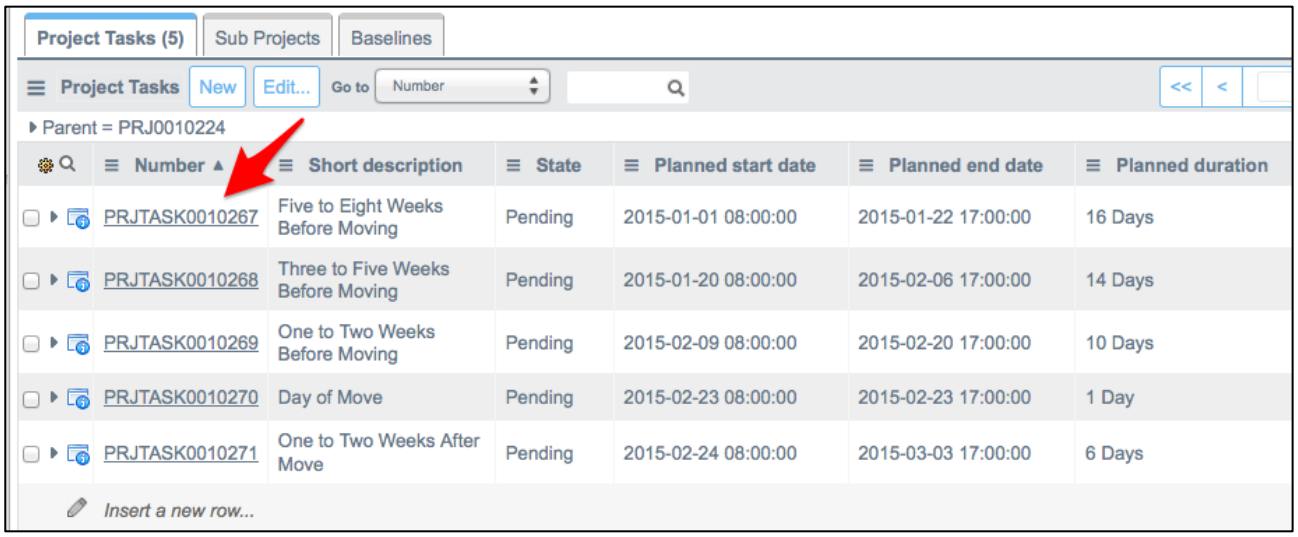
This lab is split into three exercises (labs). You have completed the Creating Project phases. This lab explains the second exercise.

- Add Project Tasks to be high level Project Phases
- **Add Project Tasks to the Project Phases**
- Add Project Sub Tasks to Project Tasks with Dependencies

Lab 4.2 Add Project Tasks

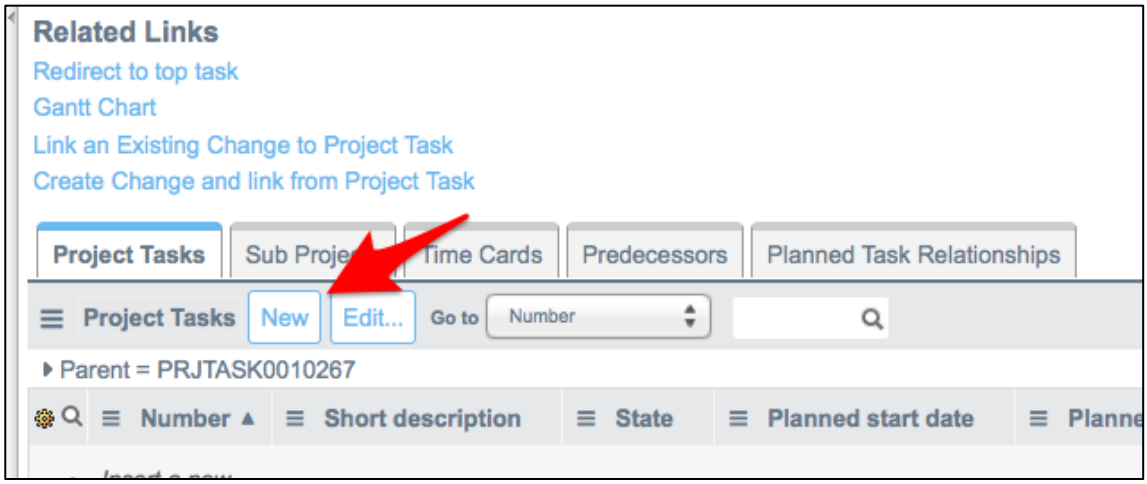
Add Project Tasks

1. In the Project Task related list, click **NUMBER** field where the Short Description is **Five to Eight Weeks Before Moving**.



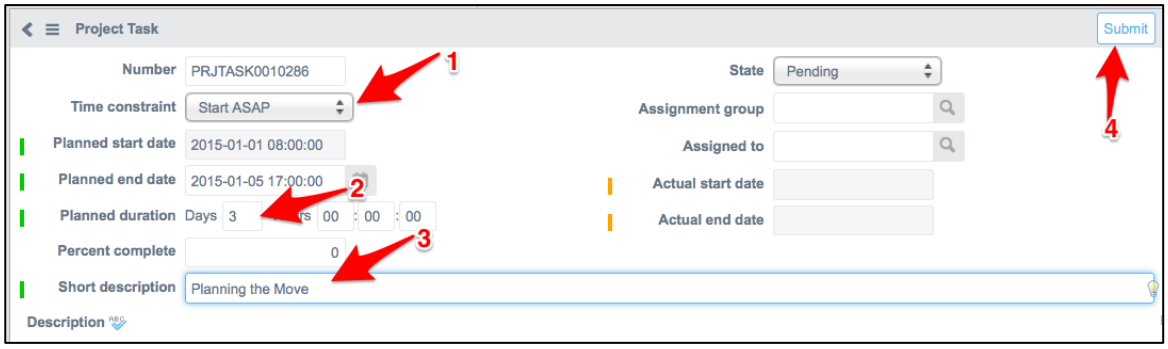
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2. On the project task form for **Five to Eight Weeks Before Moving**: Scroll down to the Project Task related list and select **NEW**.



3. On the Project Task Form:

   (Step 1) Time constraint: **Start ASAP**
   (Step 2) Planned duration: **3**
   (Step 3) Short description: **Planning the Move**
   (Step 4) Click **Submit**

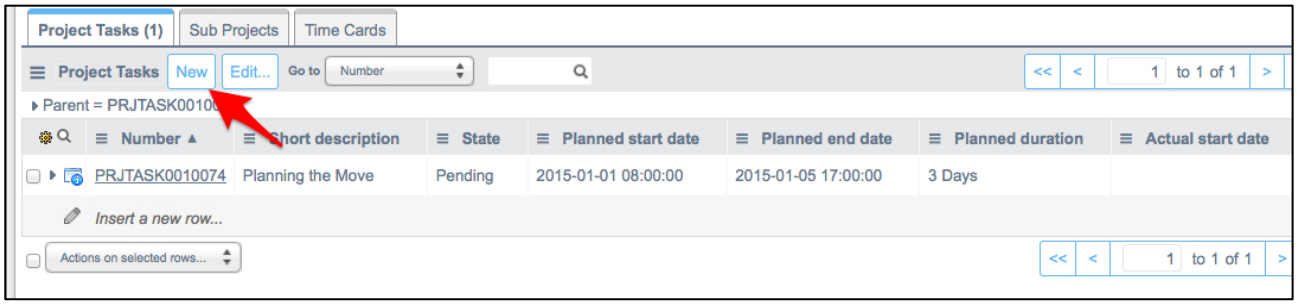


Note: Planned start date will be read only with a value of: **2015-01-01 08:00:00.** Do you know why this is?

Note: When you clicked **Submit**, the screen returned to the **Parent Task – Five to Eight Weeks Before Moving.**

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4. On the project task form for **Five to Eight Weeks Before Moving**: Scroll down to the Project Task related list to add a second task and select **NEW**.

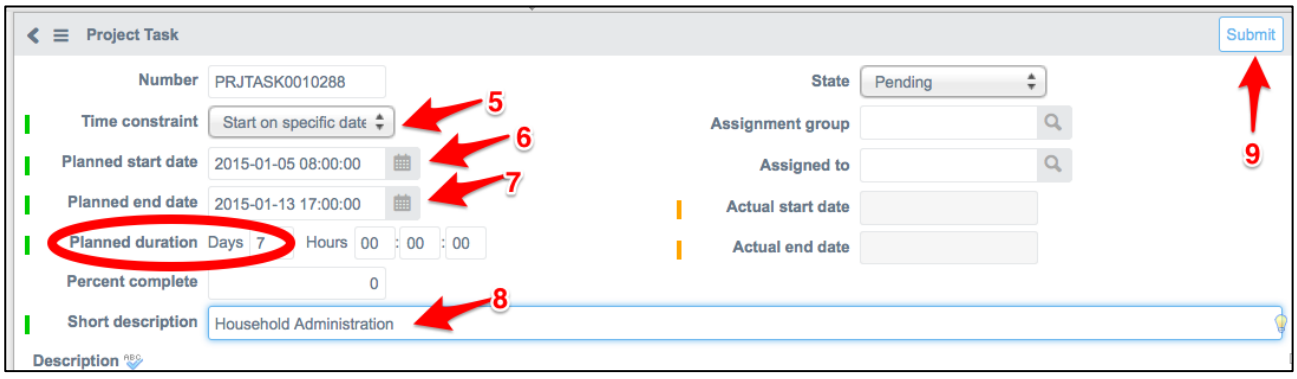


5. On the Project Task Form, enter the information into the following fields:

   (Step 5) Time constraint: **Start on specific date**
   (Step 6) Planned start date: **2015-01-05 08:00:00**
   (Step 7) Planned start date: **2015-01-13 17:00:00**
   Note: The **Planned duration** was calculated for you : **7**
   (Step 8) Short description: **Household Administration**
   (Step 9) Click **Submit**

   Note: Before you click Submit write down the NUMBER for this project task

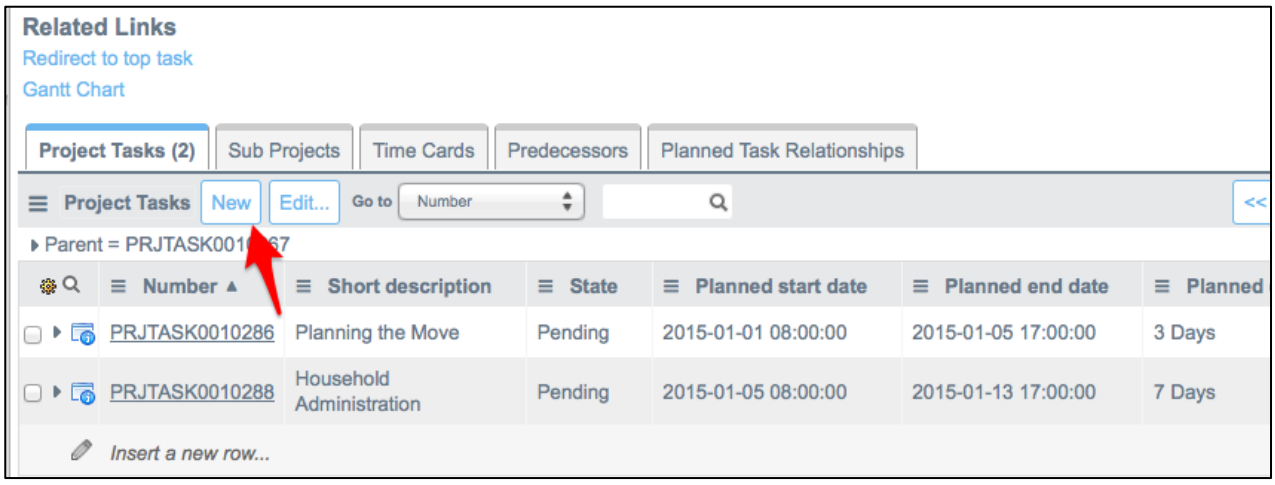
   Project Task Number: _____



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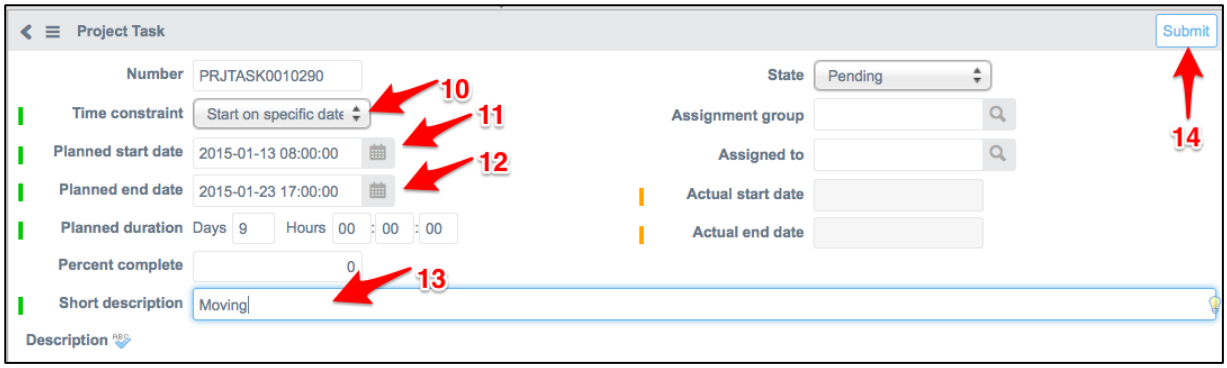
6. On the project task form for **Five to Eight Weeks Before Move**: Scroll down to the Project Task related list to add a third task.

7. Select **NEW**.



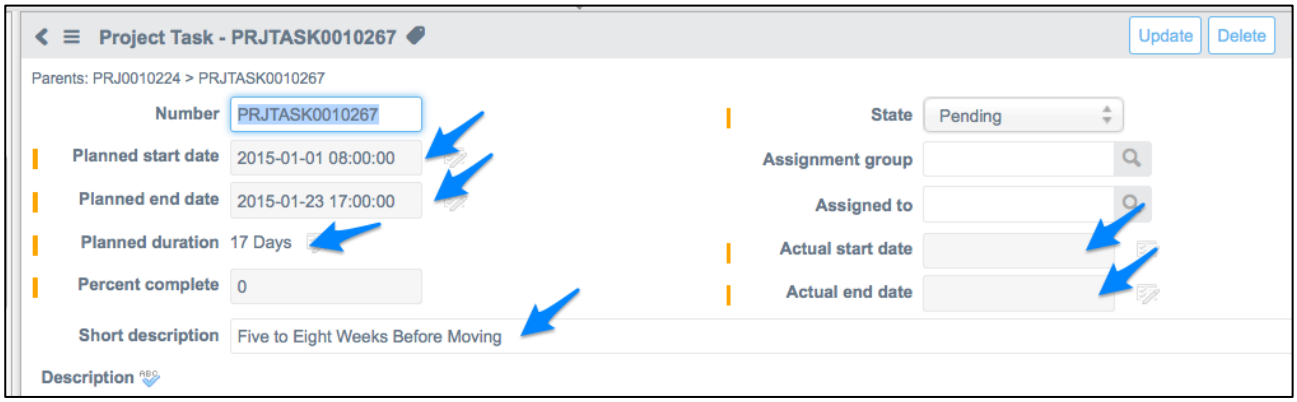
8. On the Project Task Form, enter the information into the fields below:

   (Step 10) Time constraint: **Start on specific date**
   (Step 11) Planned start date: **2015-01-13 08:00:00**
   (Step 12) Planned start date: **2015-01-23 17:00:00**
   Note: The **Planned duration** was calculated for you : **9**
   (Step 13) Short description: **Moving**
   (Step 14) Click **Submit**



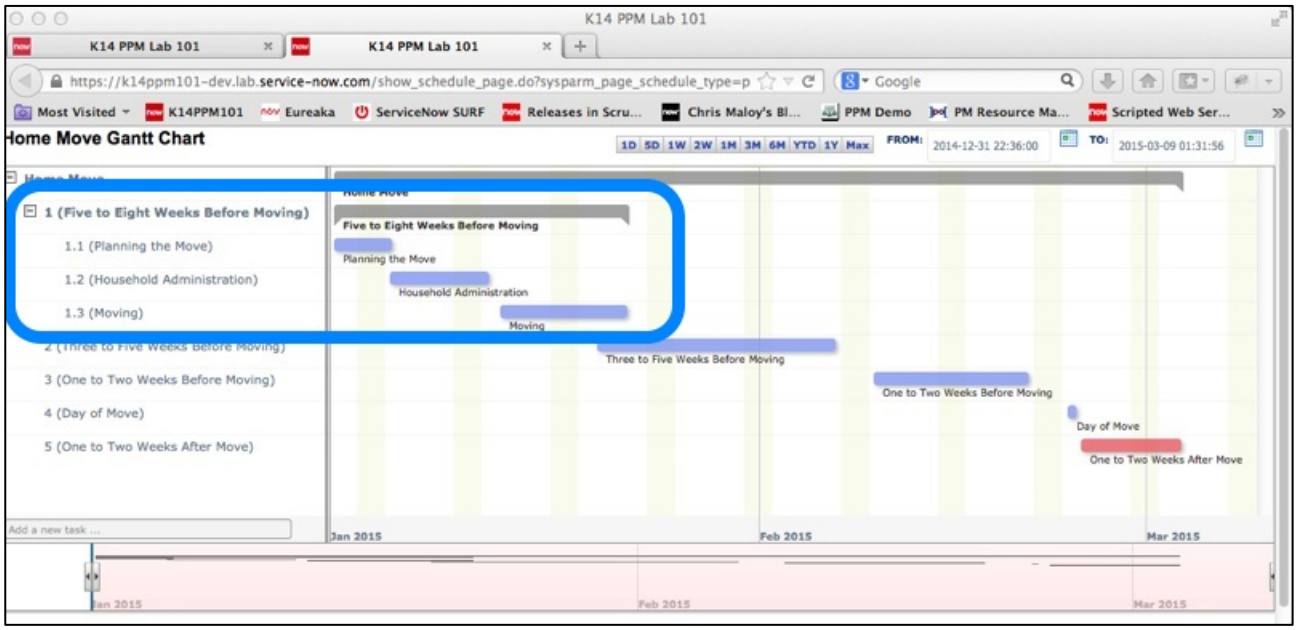
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9. The project task "**Five to Eight Weeks Before Moving**" should look similar to the one below:



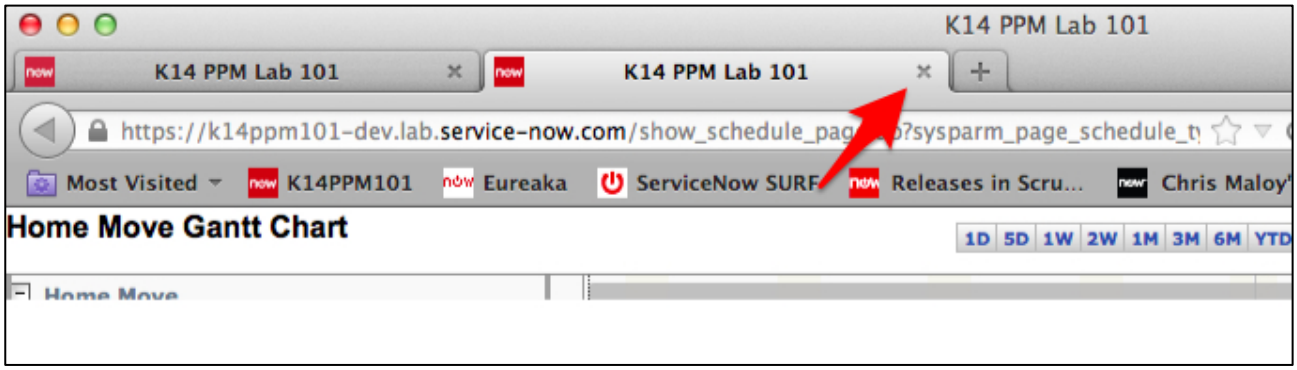
10. Click the Gantt Chart Related Link on the PROJECT TASK form for **Five to Eight Weeks Before Moving** to view the newly created dependent tasks on the Gantt chart.

    Note – some of the fields on the parent project task are set to Read Only.

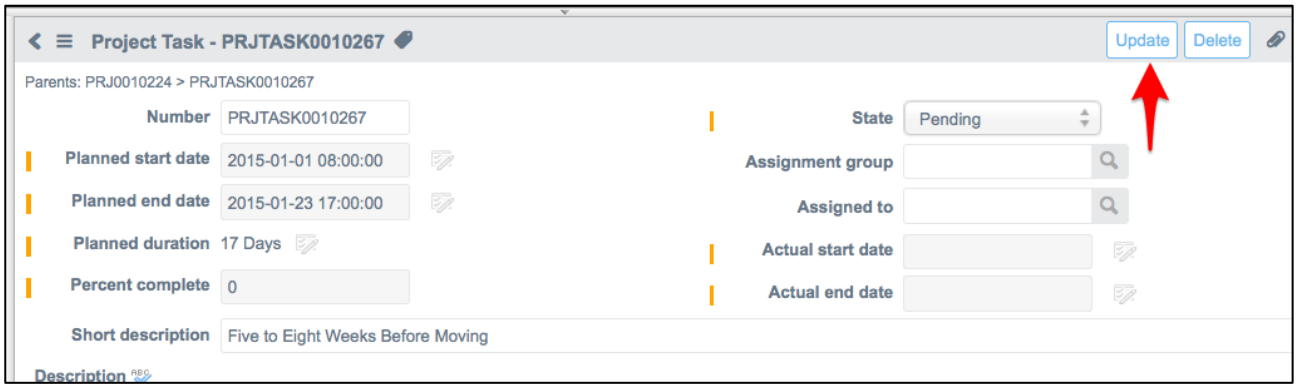


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11. To close the Gant chart, click the Gantt chart browser **X**.

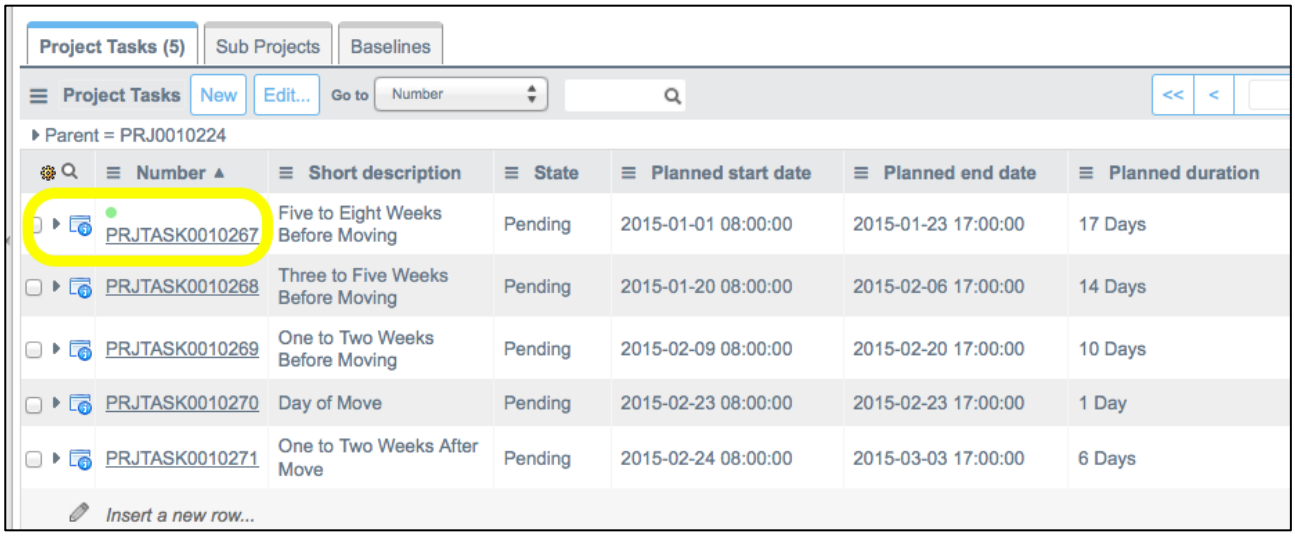


12. On the PROJECT TASK form for **Five to Eight Weeks Before Moving**, select **UPDATE**.



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13. On the **HOME MOVE** Project form, scroll down to the PROJECT TASK related list. The project task related list should look similar to the one below:



Note: **There is a** GREEN DOT **on the** Five to Eight Weeks Before Moving **task. This dot indicates that there are child tasks on this project task.**

Additional information: http://wiki.servicenow.com/index.php?title=Creating_Project_Tasks

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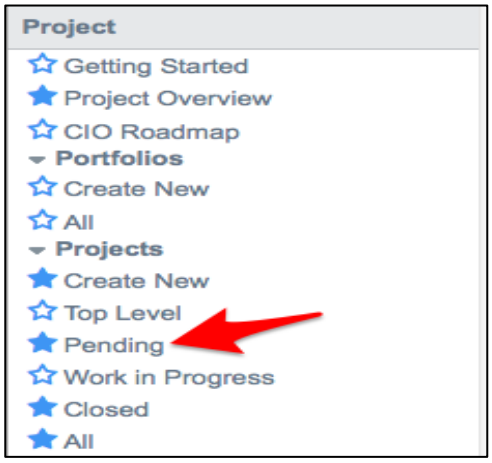
This lab is split into three exercises (labs). You have completed two out of three of the lab exercises. This lab explains the third exercise.

- Adding Project Tasks to be high level Project Phases
- Adding Project Tasks to the Project Phases
- **Adding Project Sub Tasks to Project Tasks with Dependencies**

Lab 4.3 Add Project Sub Tasks

Add Project Subtasks with Dependencies

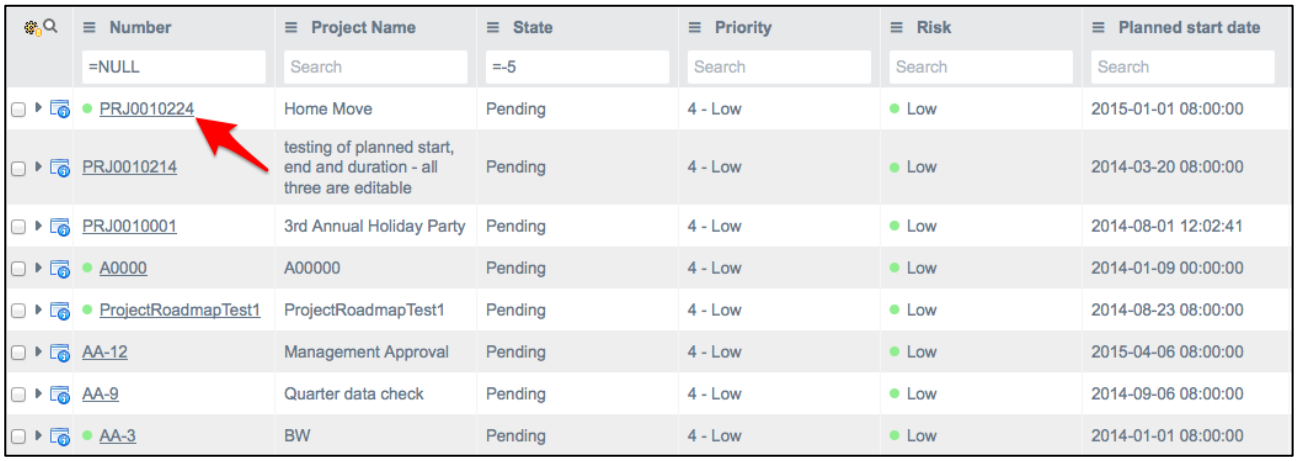
1. Navigate to **Project > Projects > Pending**.



A Pending Project list displays in the right panel.

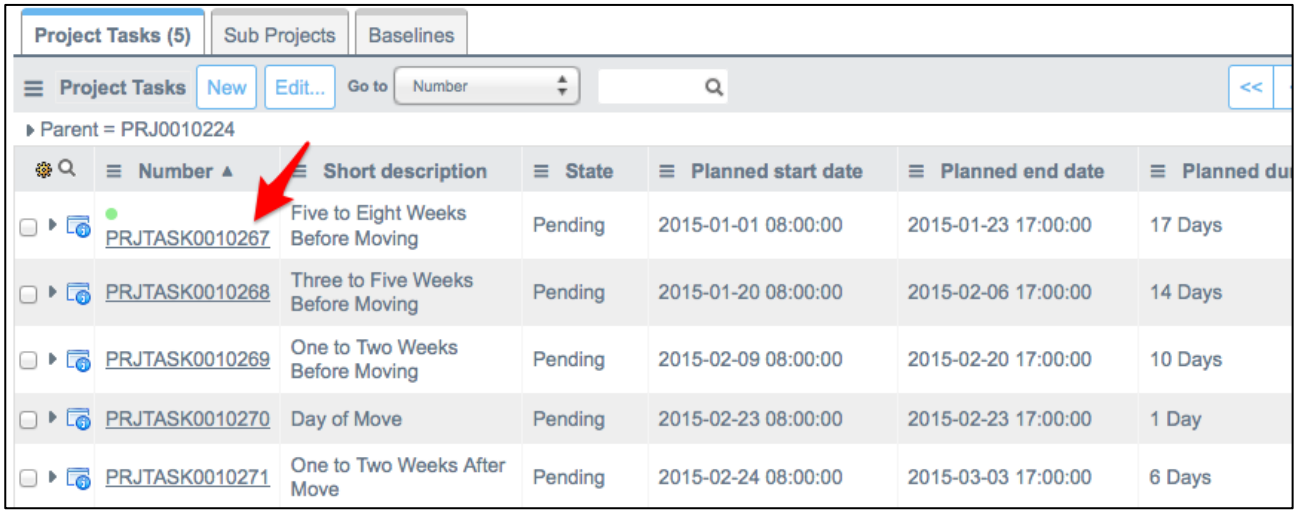
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2. Select the **Number** for the project you saved in Lab 3, Create a New Project, using the Project Management Application in ServiceNow. The project should have a Short Description of **HOME MOVE**.



Number	Project Name	State	Priority	Risk	Planned start date
=NULL	Search	=-5	Search	Search	Search
PRJ0010224	Home Move	Pending	4 - Low	Low	2015-01-01 08:00:00
PRJ0010214	testing of planned start, end and duration - all three are editable	Pending	4 - Low	Low	2014-03-20 08:00:00
PRJ0010001	3rd Annual Holiday Party	Pending	4 - Low	Low	2014-08-01 12:02:41
A0000	A00000	Pending	4 - Low	Low	2014-01-09 00:00:00
ProjectRoadmapTest1	ProjectRoadmapTest1	Pending	4 - Low	Low	2014-08-23 08:00:00
AA-12	Management Approval	Pending	4 - Low	Low	2015-04-06 08:00:00
AA-9	Quarter data check	Pending	4 - Low	Low	2014-09-06 08:00:00
AA-3	BW	Pending	4 - Low	Low	2014-01-01 08:00:00

3. In the Project Task related list, click **NUMBER** field where the Short Description is **Five to Eight Weeks Before Move**.



Project Tasks (5) | Sub Projects | Baselines

Project Tasks | New | Edit... | Go to | Number

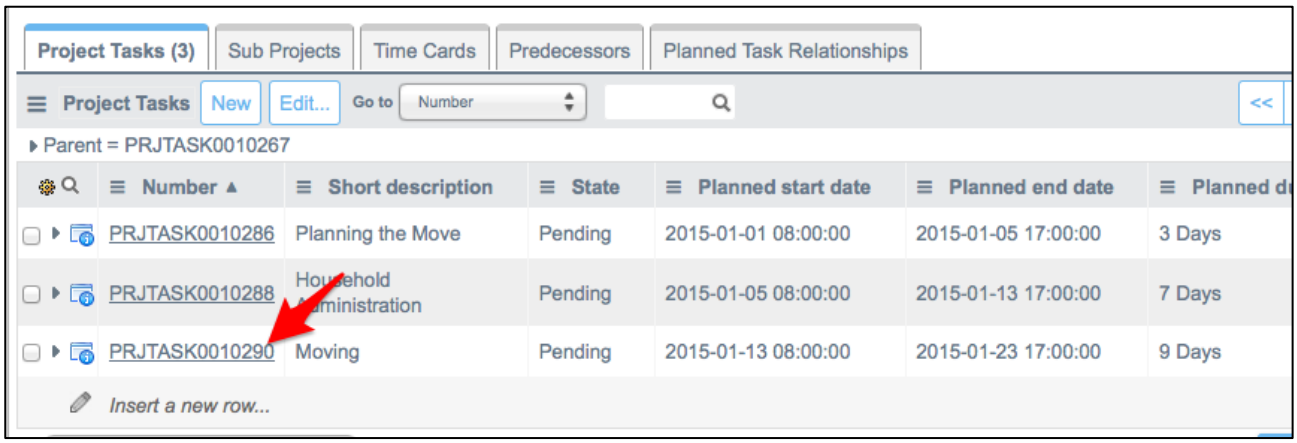
Parent = PRJ0010224

Number ▲	Short description	State	Planned start date	Planned end date	Planned du
PRJTASK0010267	Five to Eight Weeks Before Moving	Pending	2015-01-01 08:00:00	2015-01-23 17:00:00	17 Days
PRJTASK0010268	Three to Five Weeks Before Moving	Pending	2015-01-20 08:00:00	2015-02-06 17:00:00	14 Days
PRJTASK0010269	One to Two Weeks Before Moving	Pending	2015-02-09 08:00:00	2015-02-20 17:00:00	10 Days
PRJTASK0010270	Day of Move	Pending	2015-02-23 08:00:00	2015-02-23 17:00:00	1 Day
PRJTASK0010271	One to Two Weeks After Move	Pending	2015-02-24 08:00:00	2015-03-03 17:00:00	6 Days

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4. On the project task form for **Five to Eight Weeks Before Move**, scroll down to the Project Task related list.

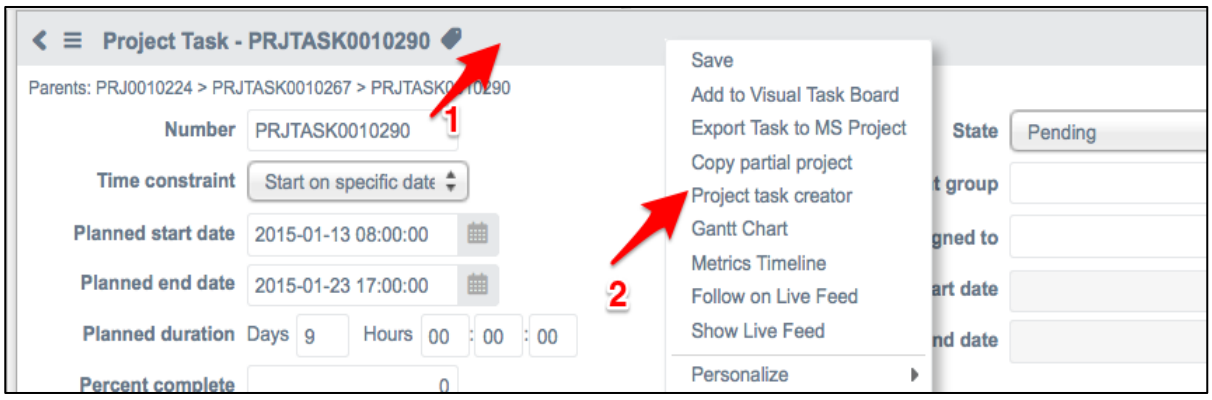
5. Click the project task **Number** for the **Moving** project task.



Now create 4 project subtasks with dependencies:

1. Right-click the Project Task form header.

2. Select **Project Task Creator** from the drop-down list.

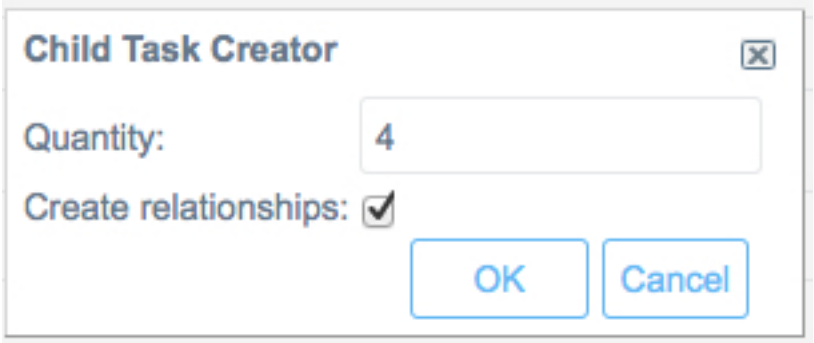


3. In the Child Task Creator, enter **4** for the **Quantity**.

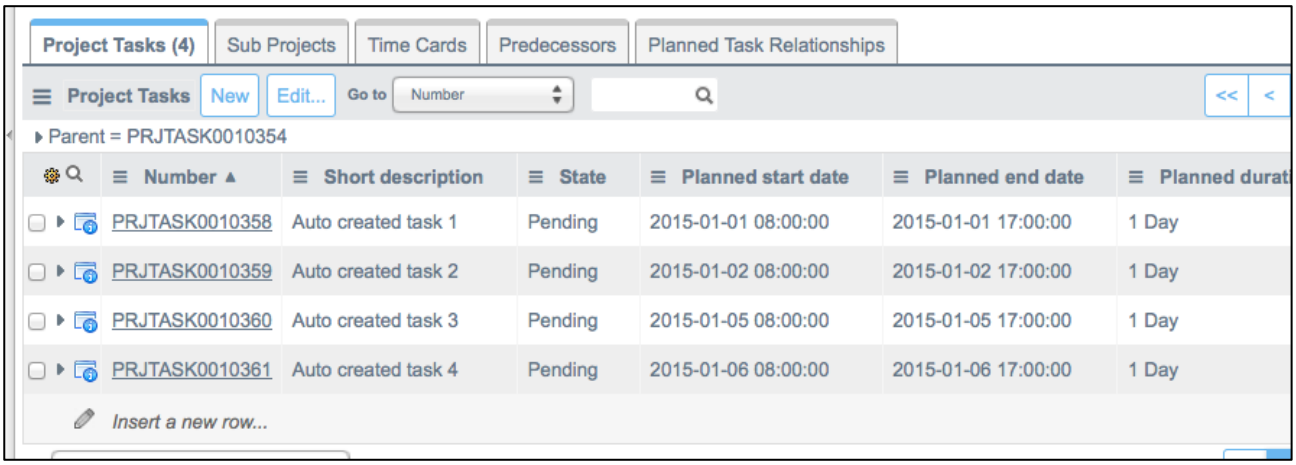
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4. Select the **Create Relationship** box.

5. Click **OK**.



View the project task form for **Moving** by scrolling down to the Project Task related list. The form should look similar to the one below:

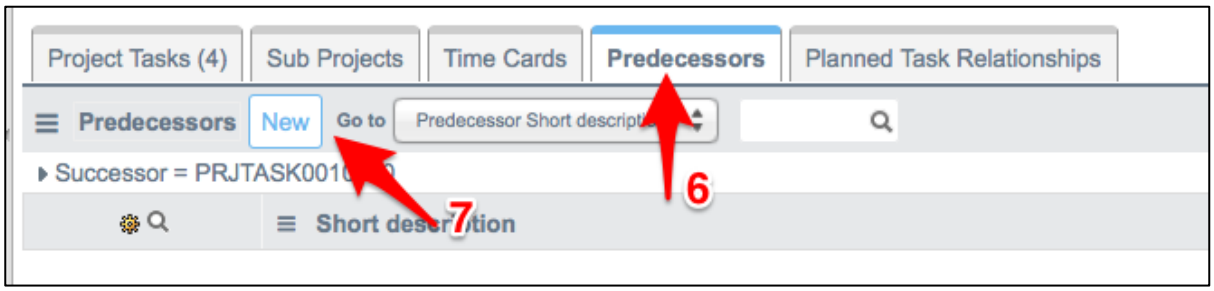


You will need the **Project Task Number** for **Household Administration** that you created in a previous lab. If you do not have that written down, please take time to find the project task number now.

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6. On the project task form for **Moving**, scroll down to the related list area and select the **Predecessor** related list.

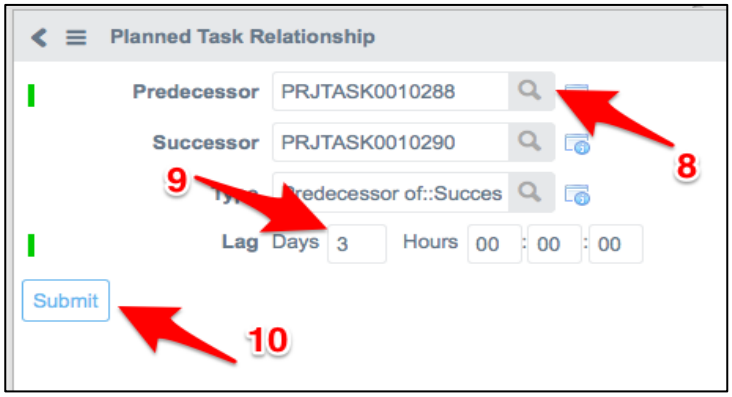
7. Select **NEW**



8. Type in the Predecessor: (**Household Administration project task number**)

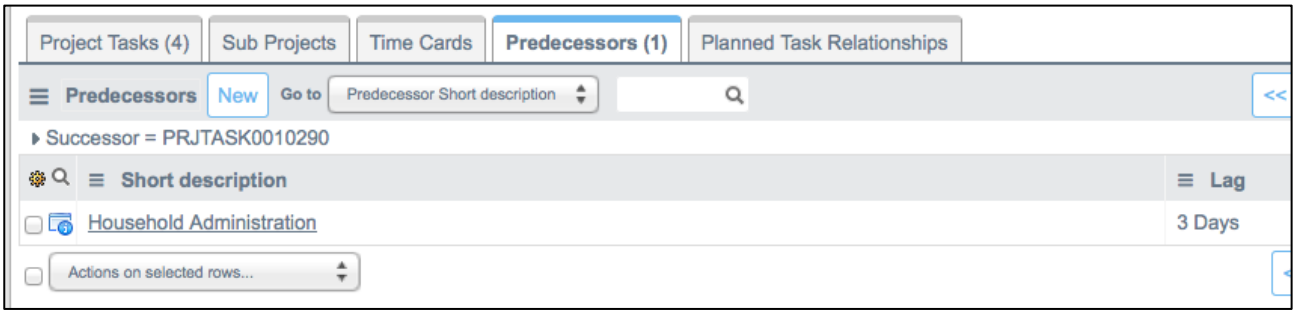
9. Set the **Lag** to **3** days.

10. Click **Submit.**

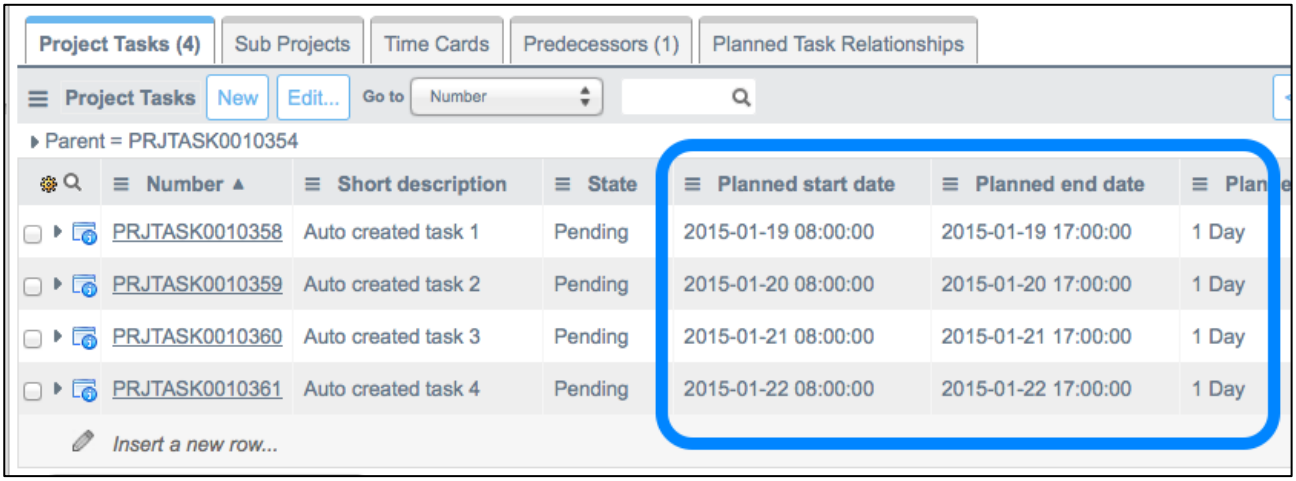


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The Predecessors related list should look similar to the one below:



On the project task form for **Moving**, scroll down to the related list area and select the **Project Tasks** related list.



Notice the **Planned start date** and **Planned end date** for all tasks have been updated to when they were created. This is due to the parent project task for **MOVING** being a predecessor of **Household Administration**.

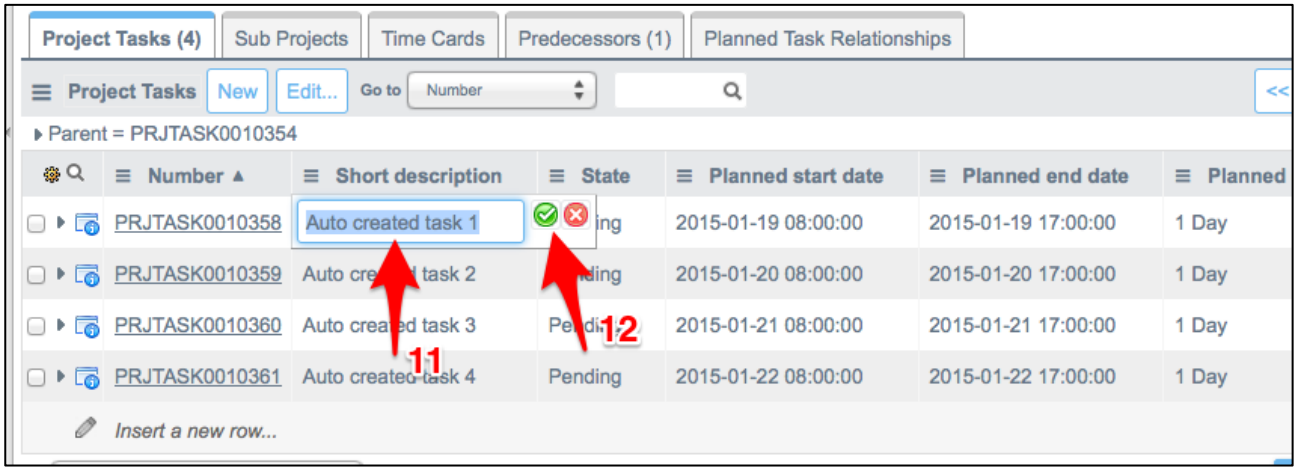
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In the Project Task related list:

11. Double-click **Auto created task 1** under Short description.

    Change it to **Obtain estimates from several moving services**

12. Click the **green check** mark to save the update.



Repeat this process for next three project tasks:

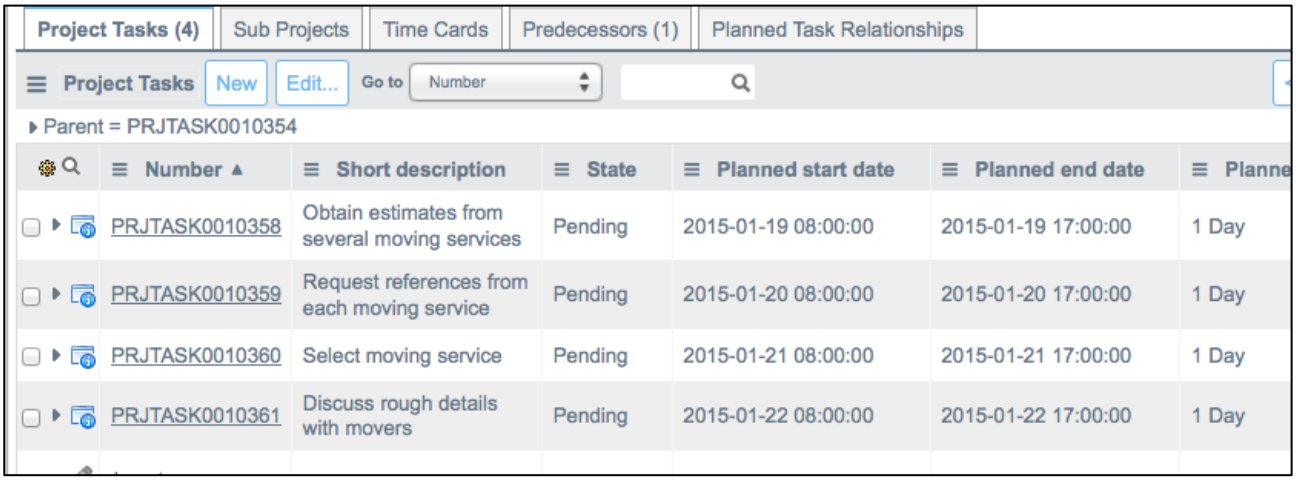
13. Change **Auto created task 2** to **Request references from each moving service**

14. Change **Auto created task 3** to **Select moving service**

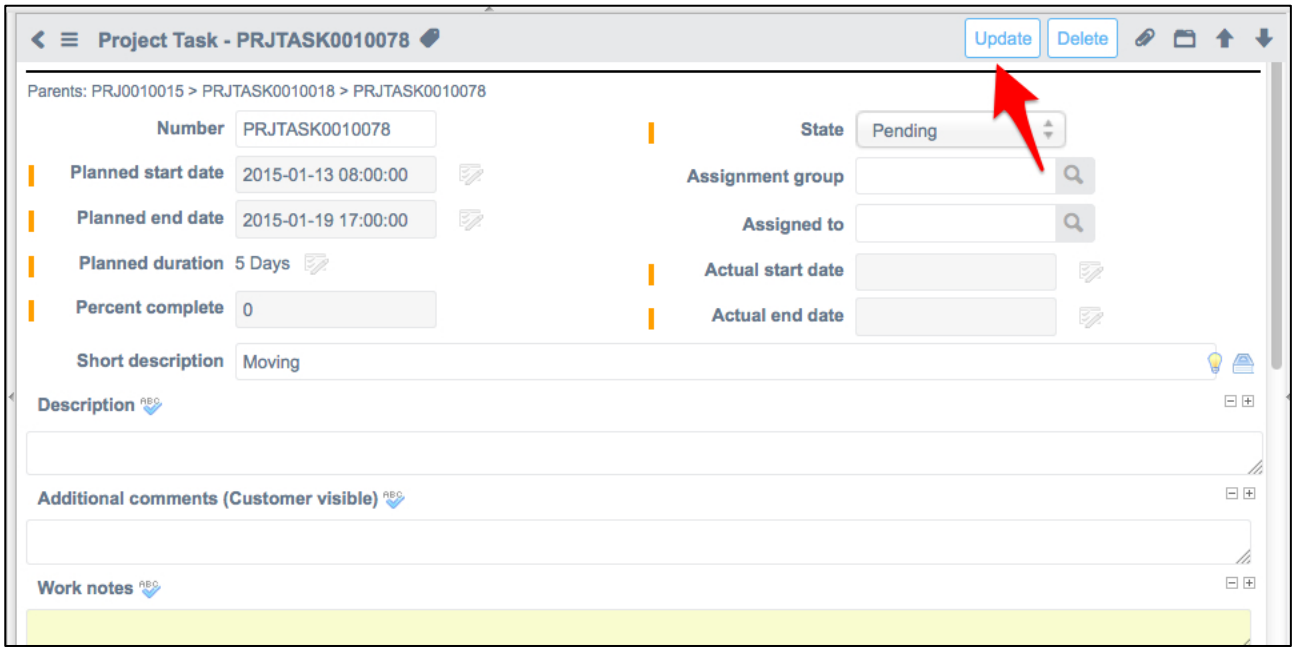
15. Change **Auto created task 4** to **Discuss rough details with movers**

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The project task related list should look similar to the one below:

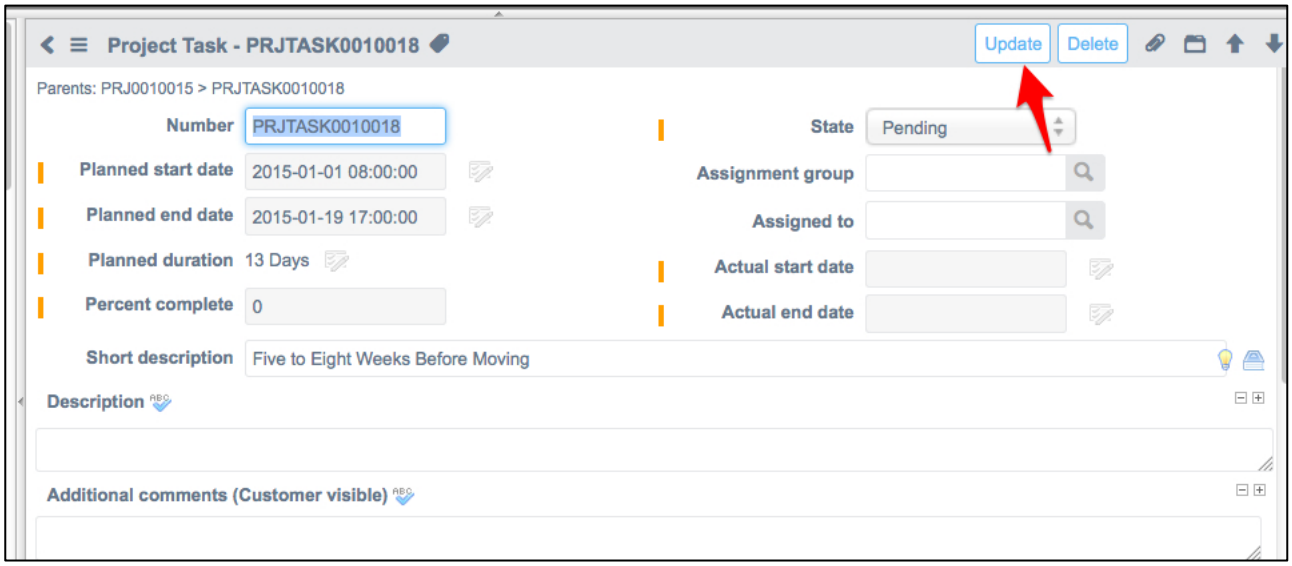


16. On the Project Task form, click **UPDATE**. This will take you to the parent project task.



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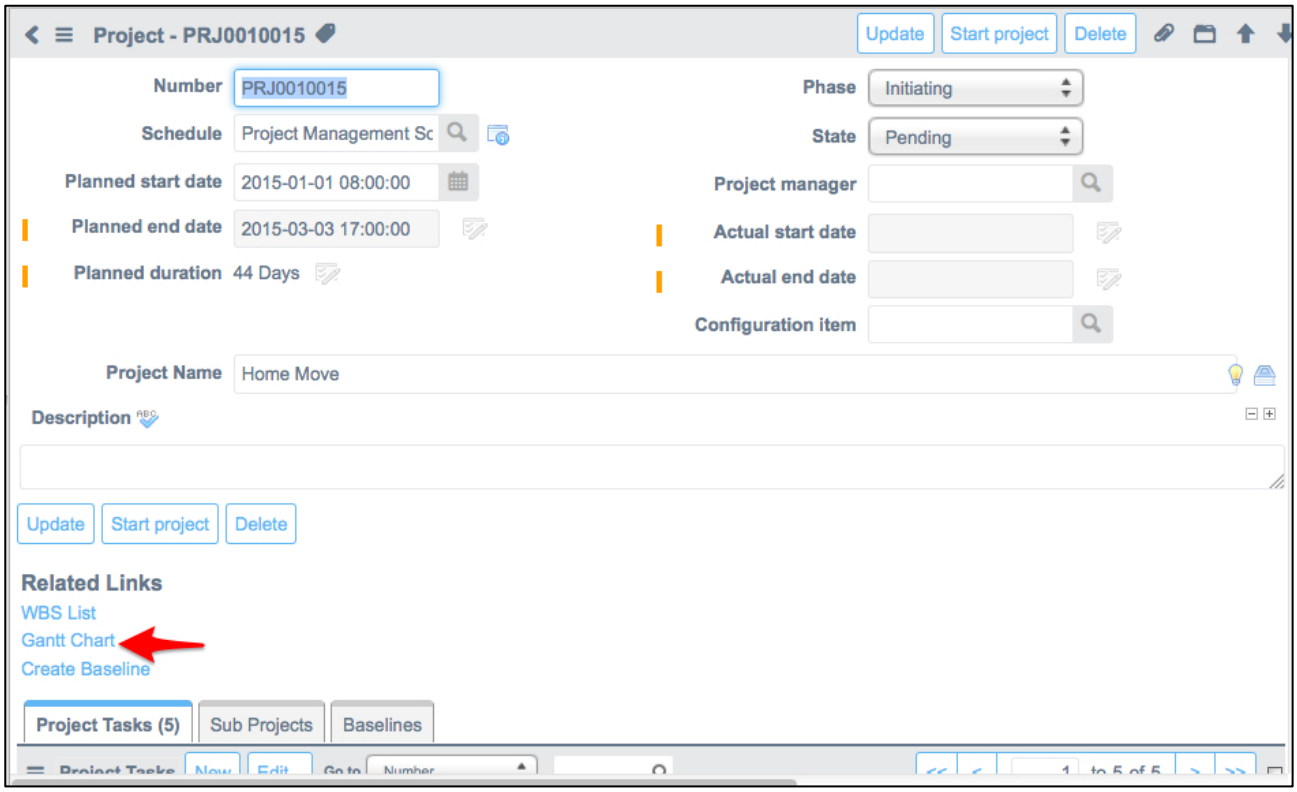
17. On this Project Task form, click **UPDATE**. This will take you to the Project form.



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Lab Success Verification

18. On the Project Form for **Home Move** scroll to the related links section and select **Gantt Chart**.

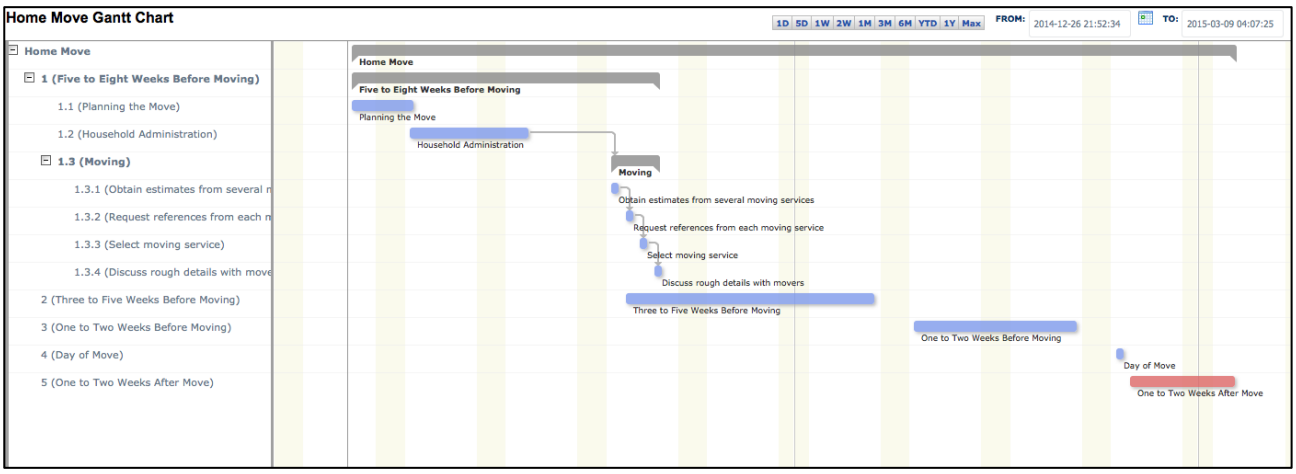


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Your project Gantt chart should look similar to the one below. You will have different project task numbers.

We will review the Gantt chart in more detail in a later lab. For now, review the visualized project information on the Gantt chart:

Project Phases
Project Tasks
Project Subtasks
Project Task Dependencies



Additional information: http://wiki.servicenow.com/index.php?title=Creating_Project_Tasks

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Understanding Time Constraints in Parent-Child Relationships

https://wiki.servicenow.com/index.php?title=Project_Task_Relationships_and_Dependencies#Time_Constraints_in_Parent-Child_Relationships

Time Constraints in Parent-Child Relationships

- If a child task is set to **Start ASAP**, the child task starts at the same time the parent task starts (as long as it does not have dependencies with other child tasks).
- If the parent task is set to **Start ASAP** and child tasks are set to **Start on specific date**, the earliest child task start date determines the start date of the parent (assuming no other dependencies). In this case, the parent's **Time constraint** field remains **Start ASAP** but the actual start date is changed to the start date of the earliest child task.
- If both the parent and first child task are set to **Start on specific date** but the first child starts later than the parent, the parent start date remains **Start on Specific Date** but the actual start date is pushed to the start date of the child. For example, if the parent task starts on October 1 and the earliest child task starts on October 2, the **Planned start date** of the parent is changed to October 2.
- Child precedence also applies to end dates. If the child task's estimated end date is later than the parent task's end date, the parent task's estimated end date extends to cover the child. For actual values, a parent has the same start date as the earliest start date of its children and the latest actual end date as the latest end date of its children, assuming the child tasks are **Closed Complete**. If the child tasks are not in the **Closed Complete** state, the actual end date of the parent is empty.
- For the planned start date of the parent task:
    - The planned start date is the earliest planned start date of all the children that do not have an actual start date.
    - If all child tasks have actual start dates, the parent task's planned start date is set to the actual start date.
- For the planned end date of the parent task, the latest planned end date or actual end date of the child tasks determines the parent's planned end date.

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Lab Goal 5

Lab 5 Using Time Card with a Project

The time card management feature works with the Task table to record time worked on Projects, Incidents, Problems, and Change Requests. Task assignees can record time worked in the Time worked field on a project task record or enter hours directly into their time card. Some tables support automatic time card creation based on start and end date fields.

This lab explains how to:

- Update **Time Card Properties**
- Add **Time Worked** field to **Project** and **Project Task** forms

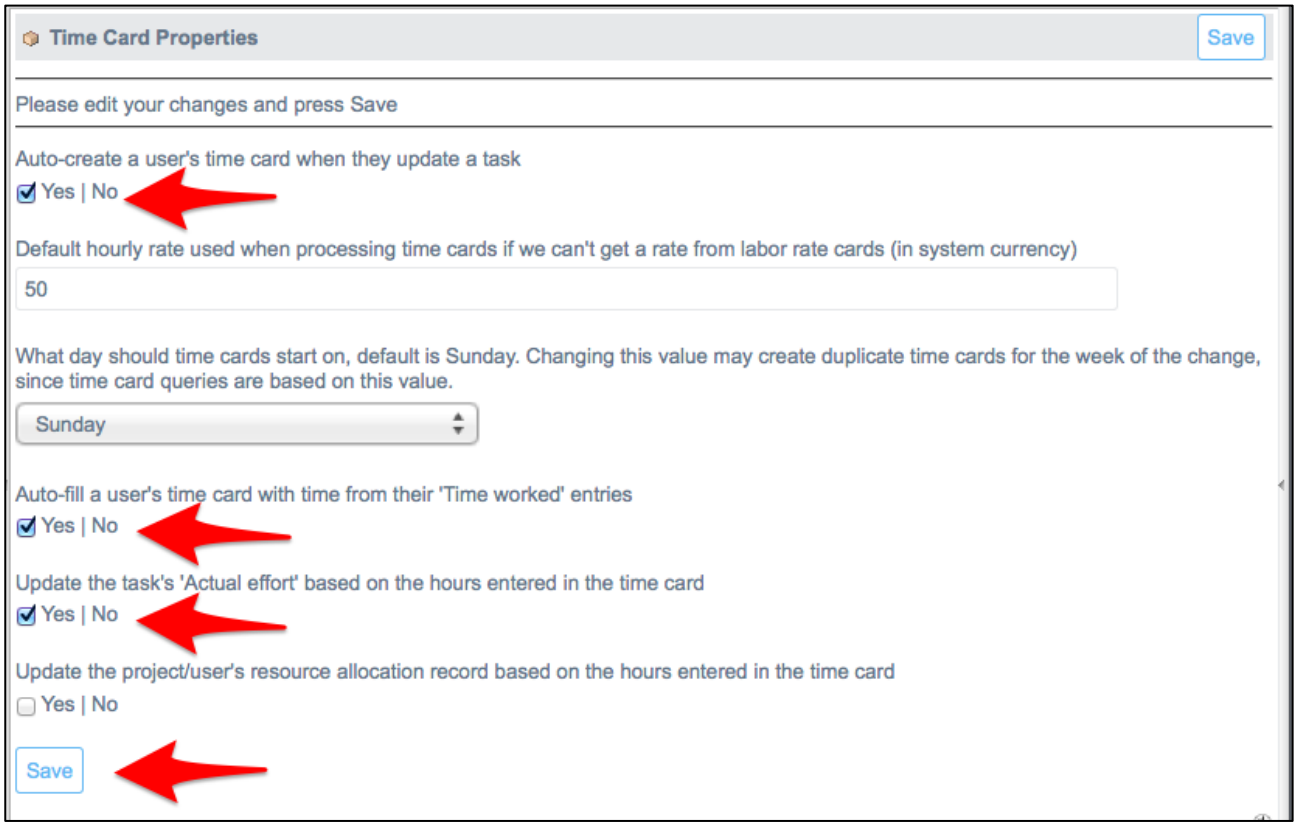
Time Card Properties

1. In the **Left Navigation Pane**, click **Time Cards** to expand the Time Cards application.

2. Click the **Administration > Properties** module to display the Time Card Properties in the main pane of the browser.

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3. Edit the following properties to YES and click SAVE to save the newly edited properties.



Note: For more information on Time Cards see the **Wiki:**
http://wiki.servicenow.com/index.php?title=Time_Cards#Overview

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Project Form Update

1. In the **Left Navigation Pane**, click **Project** to expand the Project application.

2. Click the **Projects > Create New** module to display the Project form in the main pane of the browser.

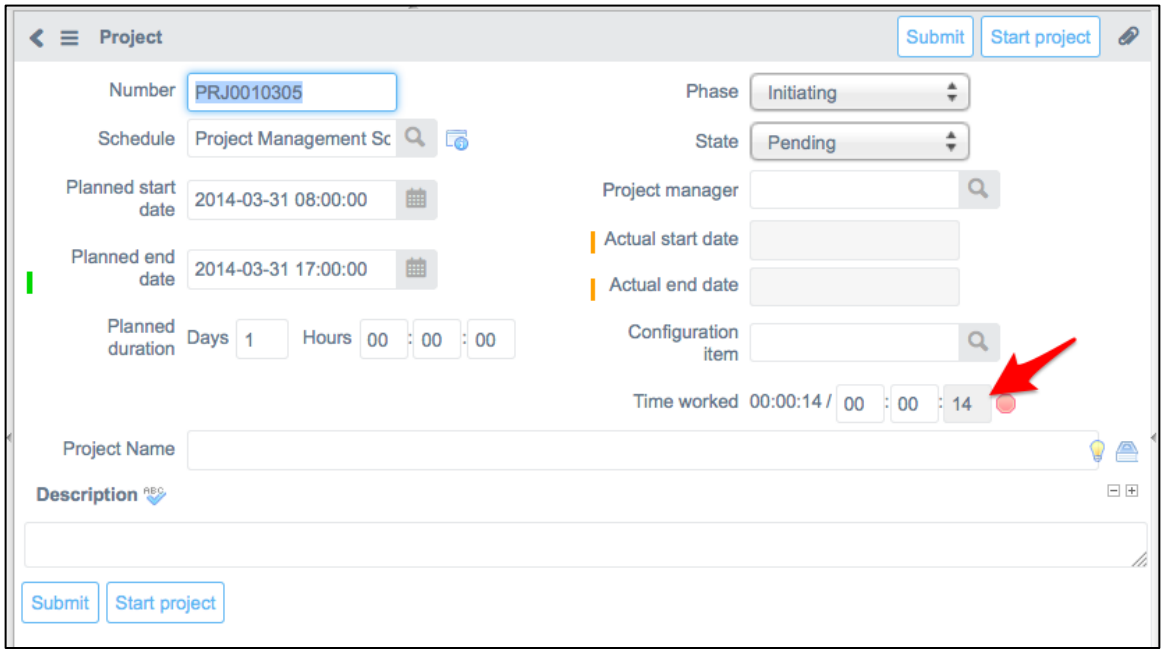
3. **Right-click** the form header and select **Personalize > Form Layout**.

4. In the **Available** slush bucket select **Time Worked**, then click **Add** to add it to the Selected slush bucket.

5. In the **Selected** slush bucket find **Time Worked** and move it **up** so it is located under Configuration Item.

6. Click **SAVE** to finish adding Time Worked to the Project form.

The project form should look like the example below with the **Time Worked** field:



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Project Task Form Update

1. In the **Left Navigation Pane**, click **Project** to expand the Project application.

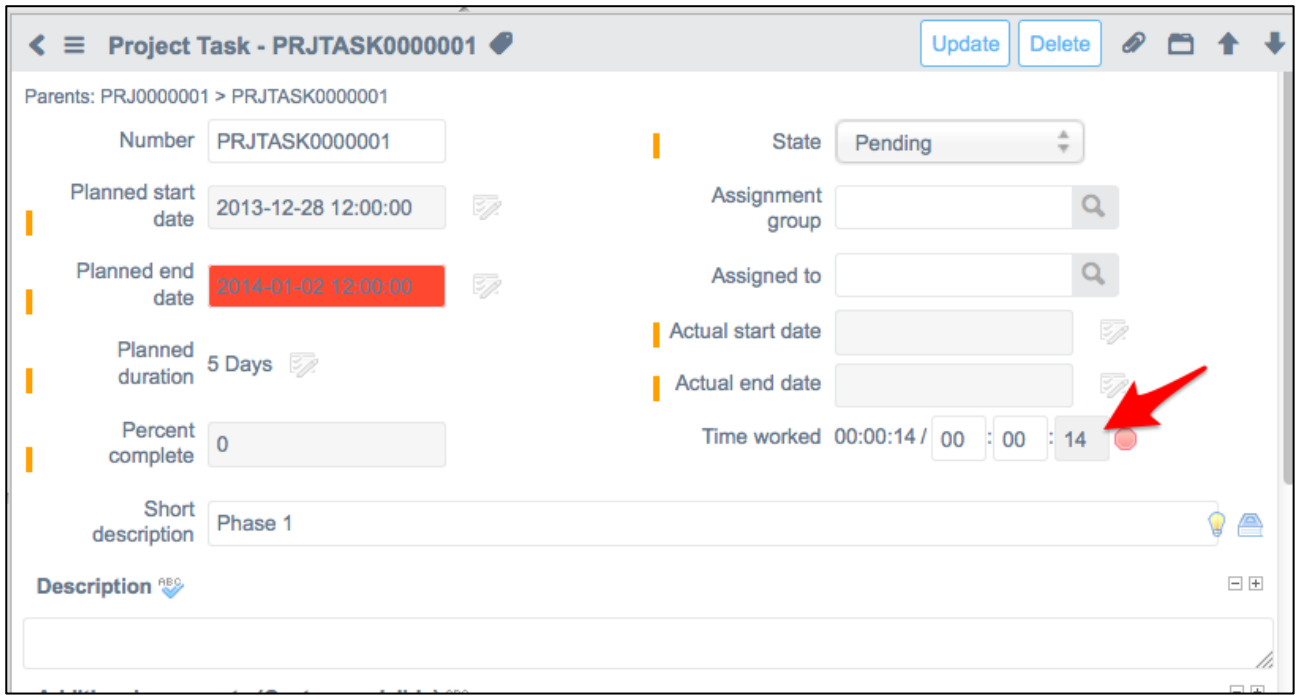
2. Click the **Project Tasks > All** module to display the Project Task list form in the main pane of your browser. Click a Project Task **Number** to open the project task form.

3. **Right-click** the form header and select **Personalize > Form Layout.**

4. In the **Available** slush bucket select **Time Worked**, then click **Add** to add it to the Selected slush bucket. In the **Selected** slush bucket find **Time Worked** and move it **UP** so it is located under Actual end date. Click **SAVE** to finish adding Time Worked to the Project Task form.

Lab Success Verification

The project task form should look like the example below with the **Time Worked** field:



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Lab Goal 6

Lab 6 Using Gantt chart on a Project

The Gantt chart is a visual representation of a project timeline that shows start and end dates of tasks, and the dependencies between tasks. Use the Gantt chart to add and delete tasks, change task dates and dependencies, and assess the progress of the overall project.

This lab explains how to:

- View the Gantt chart, project tasks and Critical Path
- View information about a task
- Add a Project Task while on in the Gantt chart
- Create a Dependency between tasks on the Gantt chart
- Create a Milestone using the Gantt chart

Viewing the Gantt Chart

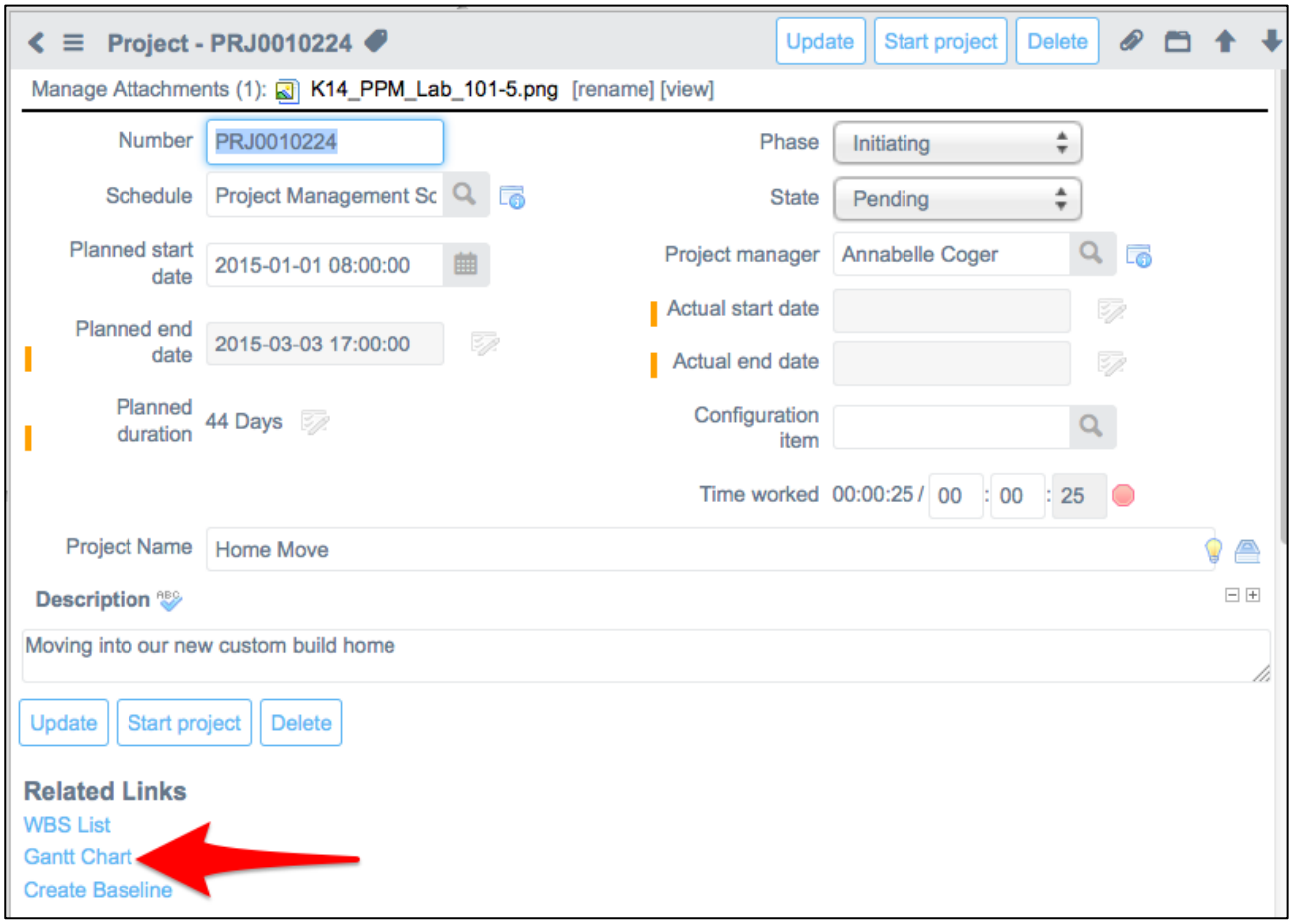
1. In the **Left Navigation Pane**, click **Project** to expand the Project application.

2. Click the **Projects > All** module to display the **Projects** form for all projects, in the main pane of the browser.

3. Select and click the **HOME MOVE** project to open.

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4. Under Related Links, click **Gantt chart**.

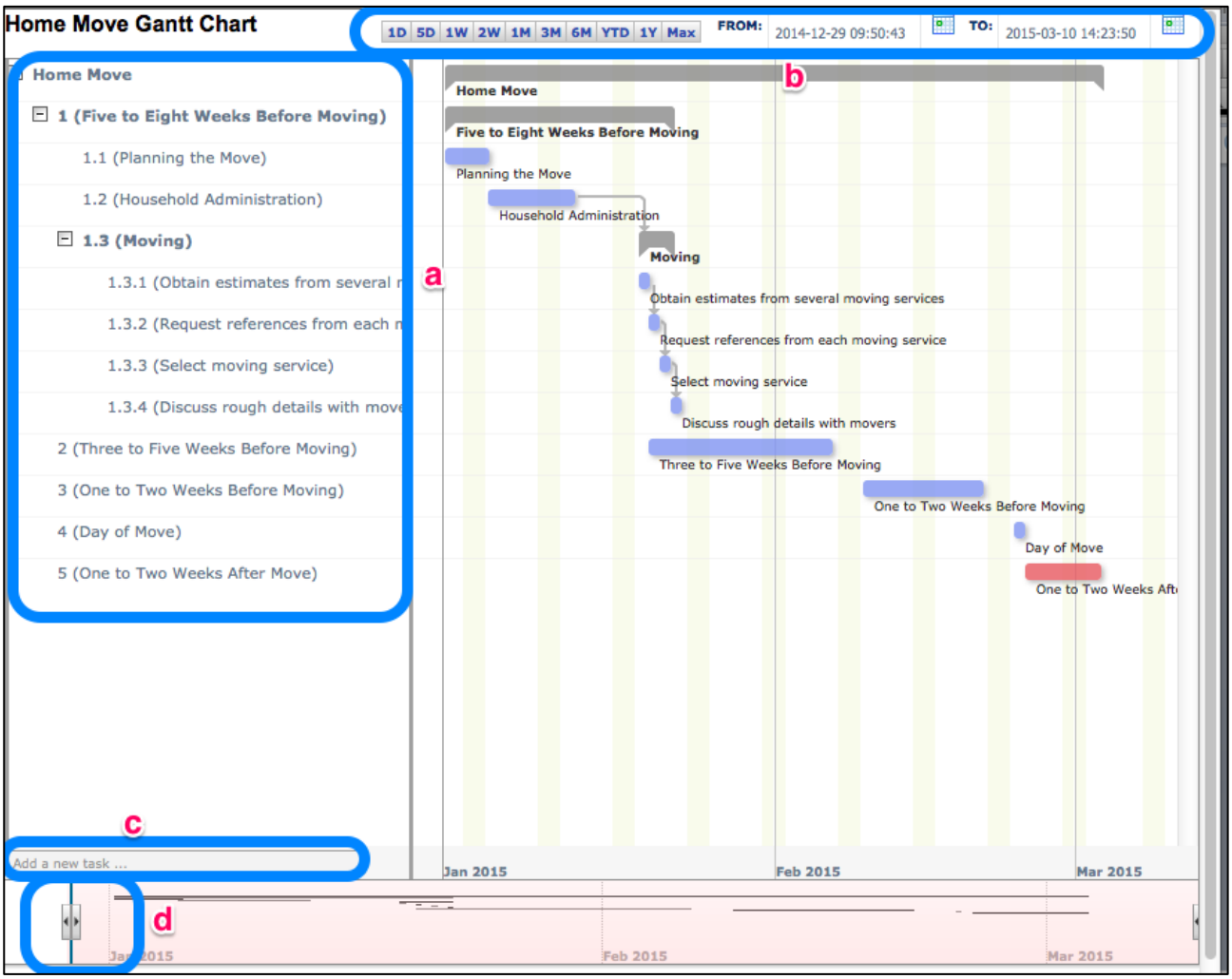


Note: The Gantt chart shows the project and tasks. Any nested projects (and associated tasks) are also shown within the hierarchical structure. Each task is labeled by its short description and is represented by a line proportional to the task's duration.

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Available on the Gantt chart:

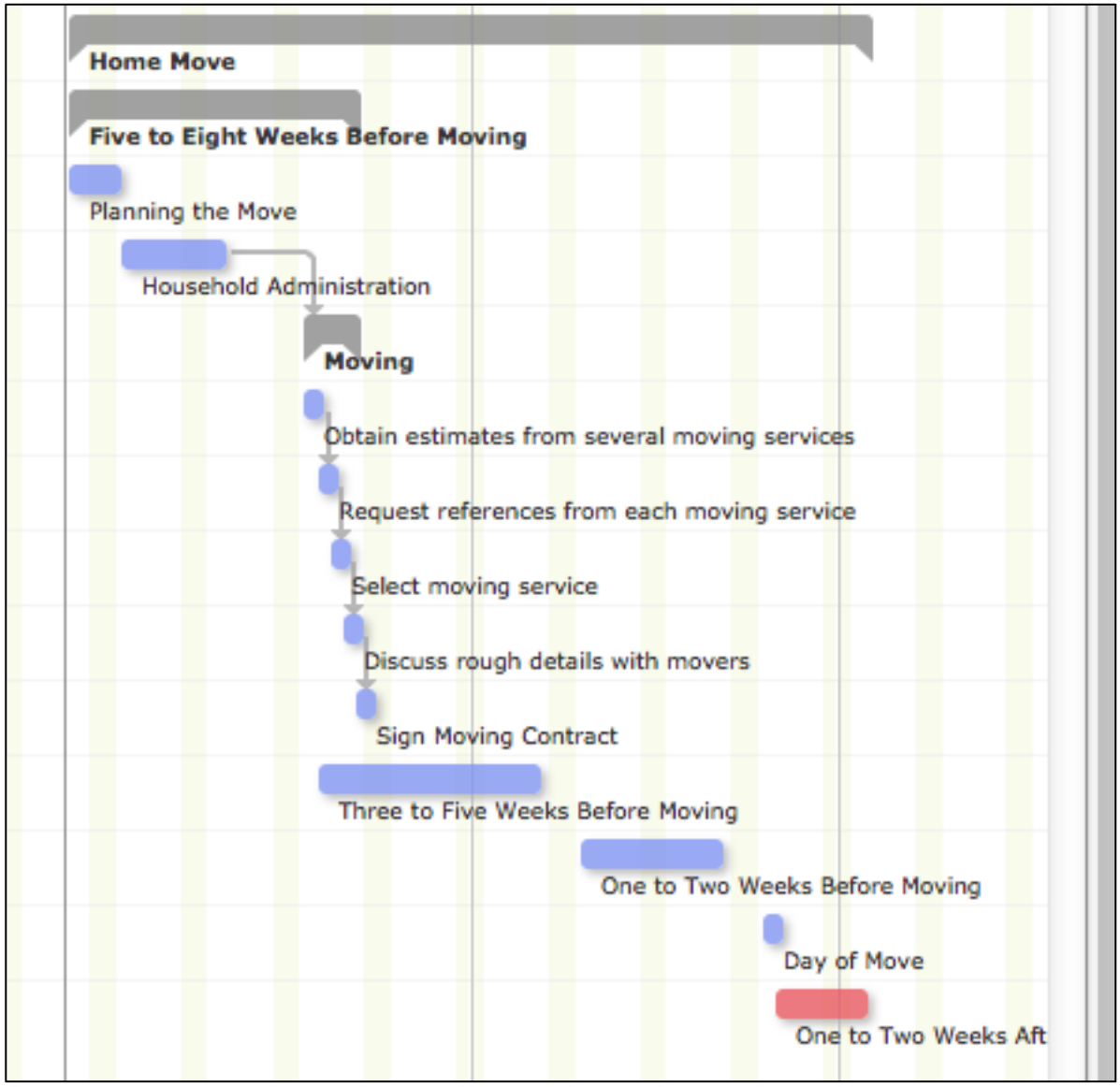
a. **Task Hierarchy**
b. **Time Span**
c. **Add a new task field**
d. **Project Slider**



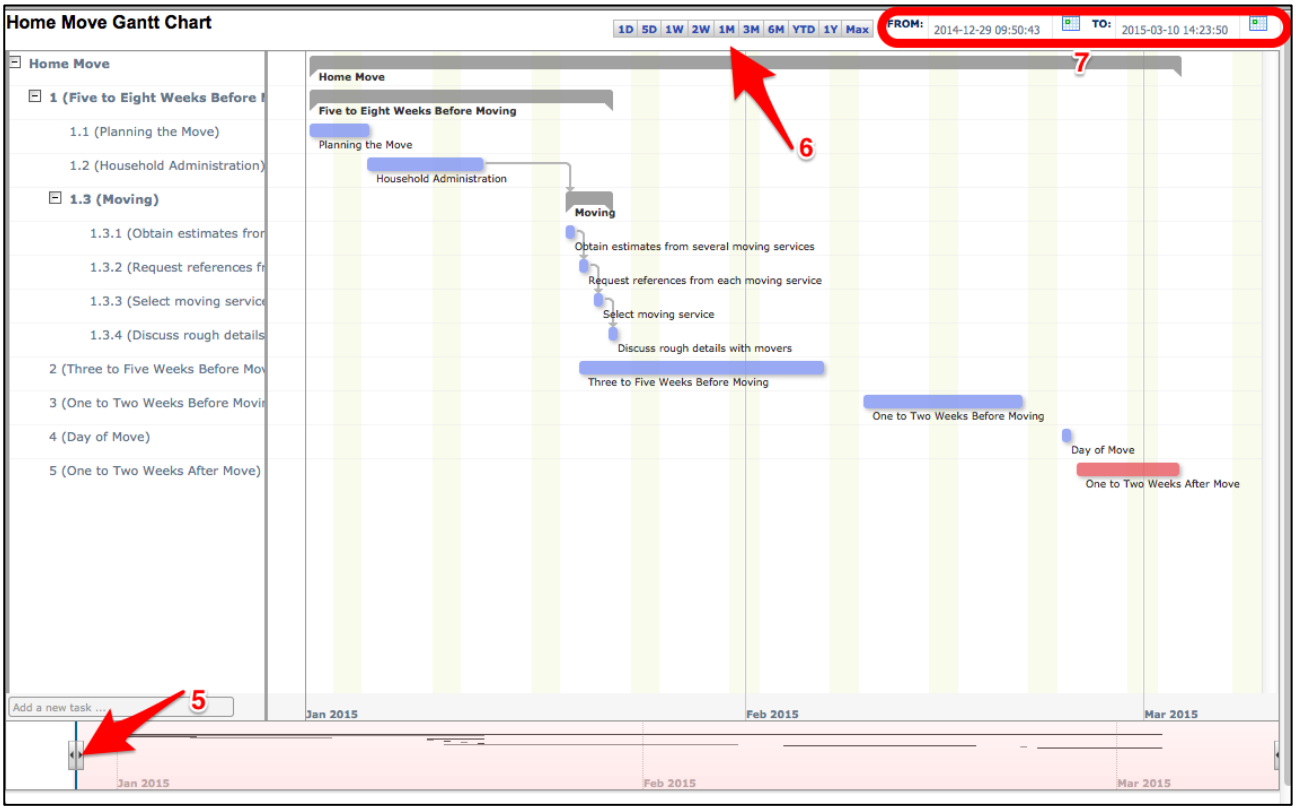
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The vertical light-brown bars in the background of the Gantt chart show time periods that are not part of the work schedule. The vertical light-brown bars represent **weekends** and **holidays**.

The critical path is highlighted in **red** on the Gantt chart to differentiate critical path tasks from standard tasks in **blue** and rollup tasks in **gray**.



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Change the perspective:

5. Move the slider at the bottom of the chart right or left to scroll across the chart, or adjust the end points of the slider to change the magnification.

   Note**: A narrow slider zooms in on the tasks and provides a more detailed view of the task relationships. A wide slider pulls the view out and makes more of the Gantt chart visible on the screen.**

6. Click a time interval, such as **1M** for one month, from the options above the chart. The time interval zooms the chart in or out starting with the current time and date, which is signified by a vertical green line.

7. Specify a time interval by selecting **From** and **To** dates above the chart.

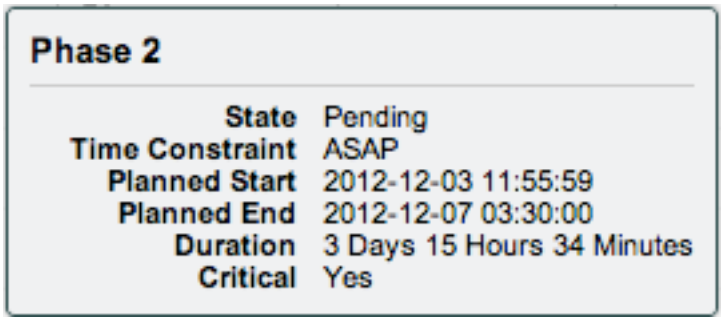
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Viewing Task information

1. Double-click the task bar to open the project task record and view the task information in full view.



2. Point to the task bar to display the project task tooltip. Yours will look similar to this one.



Creating a Project Task on the Gantt Chart

1. On the Gantt chart left pane, in the **Add a new task** field, enter **Sign Moving Contract** for the new task and press **Enter**.

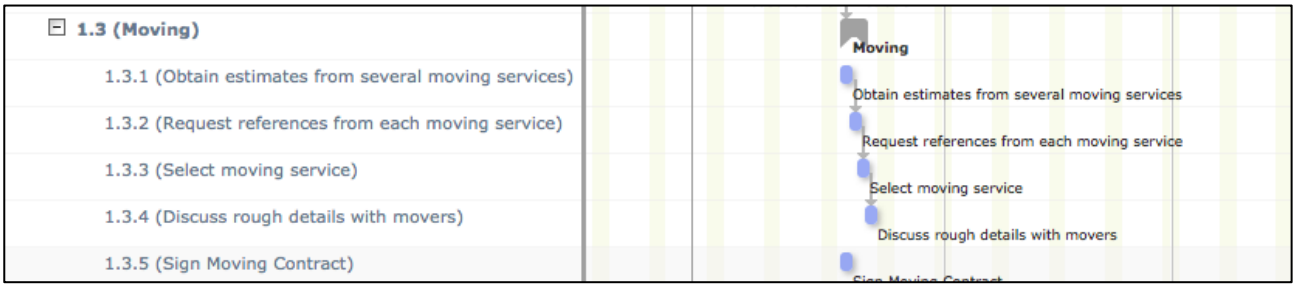
2. From the left pane drag **Sign the Moving Contact** task to be under **Moving** in the task hierarchy.

3. Double-click the task bar and view the task in the Project Task form.

4. Click  in the upper-right corner when finished viewing.

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The Gantt chart – MOVING Project task should look similar to the example below.

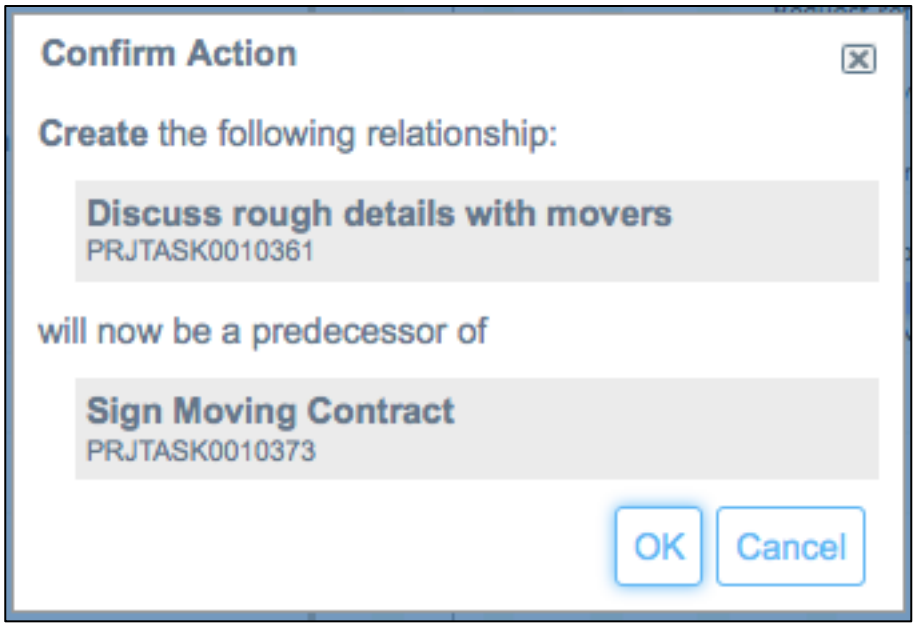


Creating a Dependency between Tasks on the Gantt Chart

1. Click and hold the **Discuss rough details with movers** task.

2. Drag to the **Sign Moving Contract** task. A line appears showing the new relationship. Also, note the **Sign Moving Contract** tasks will be highlighted in the Task Hierarchy.

3. In the message that appears, click **OK** to confirm the new dependent relationship.



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To edit a relationship:

4. Double-click the connector between tasks.

5. Use the **Planned Task Relationship** dialog box to define the order of tasks and the lag time between tasks.

6. The relationship **Type** for planned tasks is **Predecessor of::Successor of** and should not be changed.

7. When a **Lag** value exists, ServiceNow recalculates the critical path accordingly.

Create a Milestone Using the Gantt Chart

Perform the same steps as in **Adding a Task** but change the duration to **0** days.

1. Using the open Gant chart for "**Home Move**", enter **Moving Milestone** for the new task in the **Add a new task** field and press **Enter**.

2. From the left tab, drag the project task **Moving Milestone** to **Moving** phase in the task hierarchy.

3. Double-click the task bar, change the following fields:

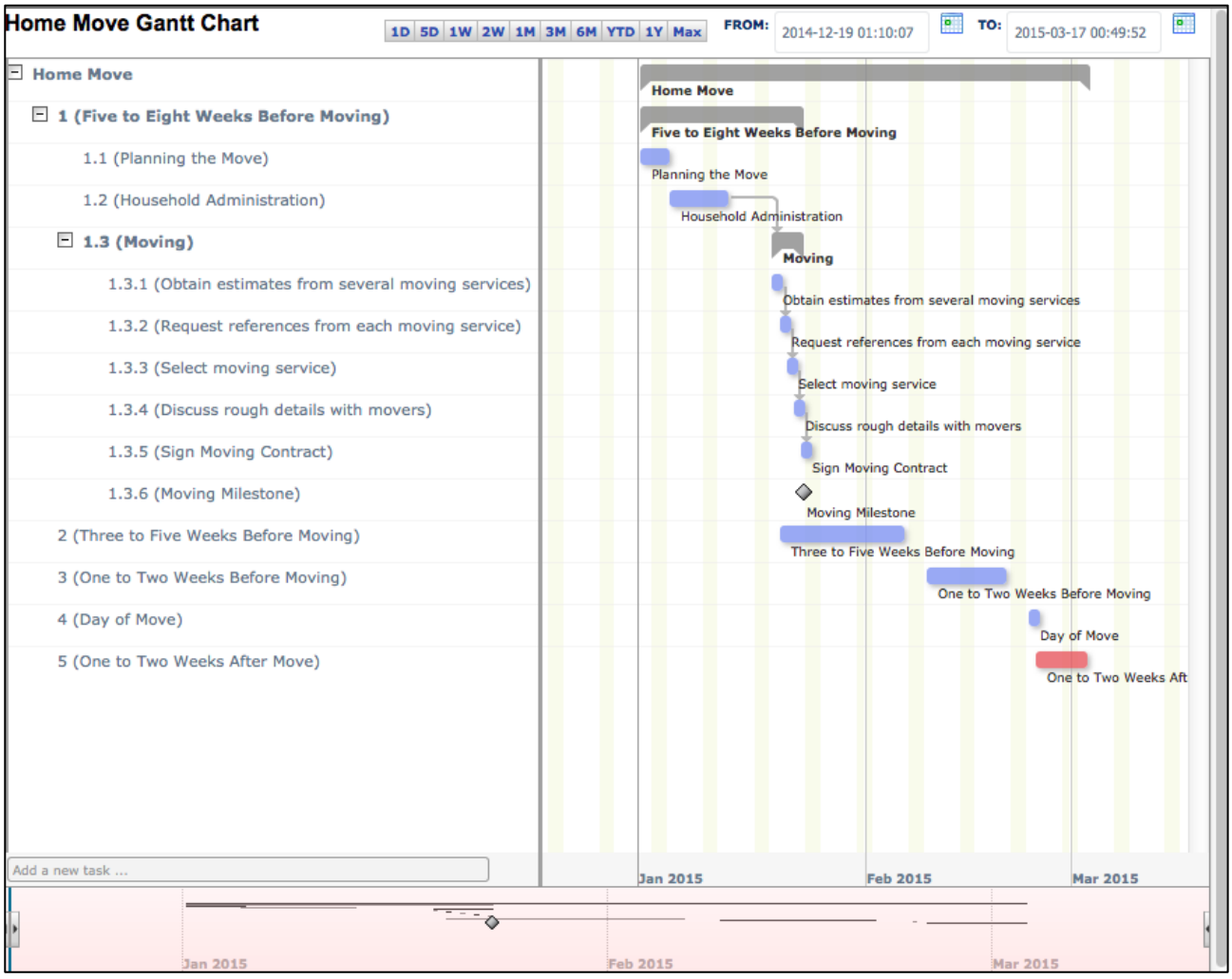
   Time constraint = **Start on specific date**
   Planned start date = **2015-01-23 17:00:00**
   Planned end date = **2015-01-23 17:00:00**
   Planned duration = **Days 0 Hours 00:00:00**

4. Click **Update**.

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Lab Success Verification

1. The Gantt chart should look similar to the example below:



2. Close the Gantt chart window; click the **X** in the top right of the windows tab.

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Lab Goal 7

Lab 7 Resource Assignment to Project Task

Project User resources or team members are the individuals (users) in an organization who are assigned to project tasks. An assignment group is a collection of users with similar skills who could be assigned to the same types of project tasks. User or group assignments are not mandatory to manage projects in the Project application.

Resources also tie into Resource Management, Cost Management and Skills Management. For example, you can relate a resource plan to the task to reserve resources; you can filter a list of desired resources by skill(s). Optionally, if a resource has a labor rate card, an expense line can be automatically generated against the project when the user creates a time card for the project task.

This lab we explains how to assign resources to tasks.

Adding Resources to Project Tasks

1. In the Left Navigation Pane, click **Project** to expand the Project application.

2. Click the **Projects > All** module to display the Projects form for all projects, in the main pane of the browser.

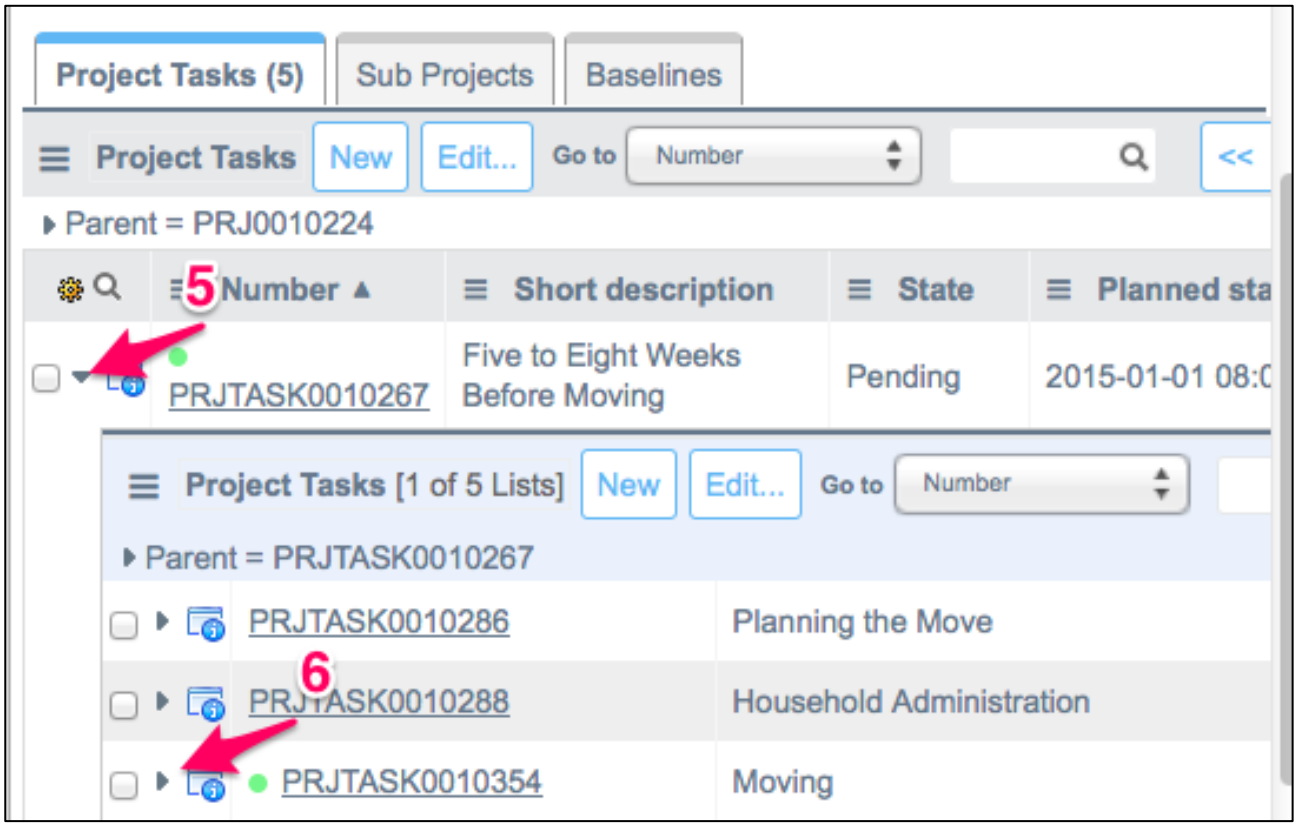
3. Select and click the **HOME MOVE** project to open.

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4. Scroll to the bottom of the project form and select the **Project Task** tab.

5. Expand the Home Move **Five to Eight Weeks Before Moving** task to view its child project tasks.

6. Expand the **MOVING** project task.

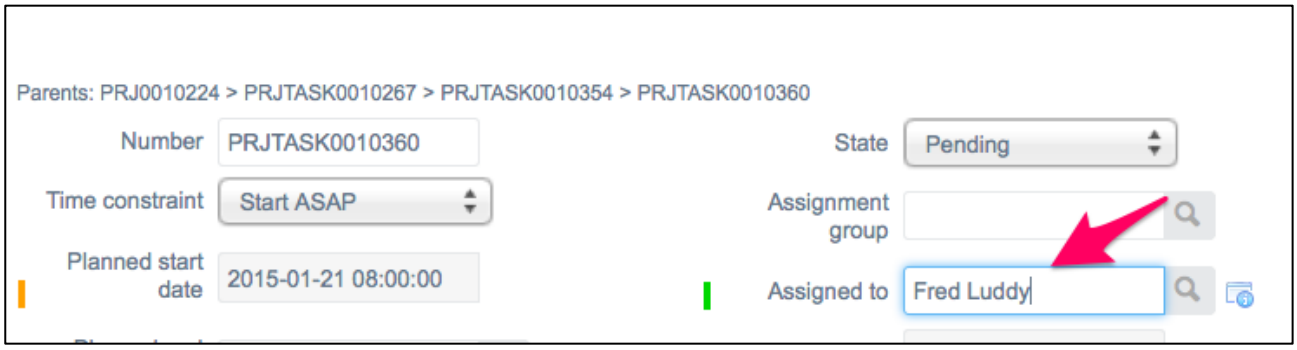


7. Select the Project Task **Number** for the **Select moving service** project task.

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8. Fill in **Assigned to** with **Fred Luddy.**

   Write down the **Project Task Number** _____



9. Click **Update**.

Repeating Steps From Above to Assign a GROUP to a Project Task

10. Expand the Home Move **Five to Eight Weeks Before Moving** task to view it's child project task.

11. Expand the **Moving** project task.

12. Select the Project Task **Number** for the **Obtain estimates from several moving services** project task.

13. Fill in **Assignment group** with **Database**.

14. Click **Update**.

15. Write down the **Project Task Number** _____

Lab Success Verification

Lab verification will take place in the following lab when we impersonate Fred Luddy and start a project task.

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Lab Goal 8

Lab 8 Create a Project Baseline

A baseline is a collection of all planned dates for all tasks and milestones at the time you create the baseline. On the Gantt chart, the baseline appears as a set of black lines offset to the left or right of the bars that represent the actual tasks. The black lines represent planned dates, while the task bars represent the actual dates. Typically, the project tasks are shifted to the right of the black baselines, which indicates that a project is running behind schedule.

In this lab we will:

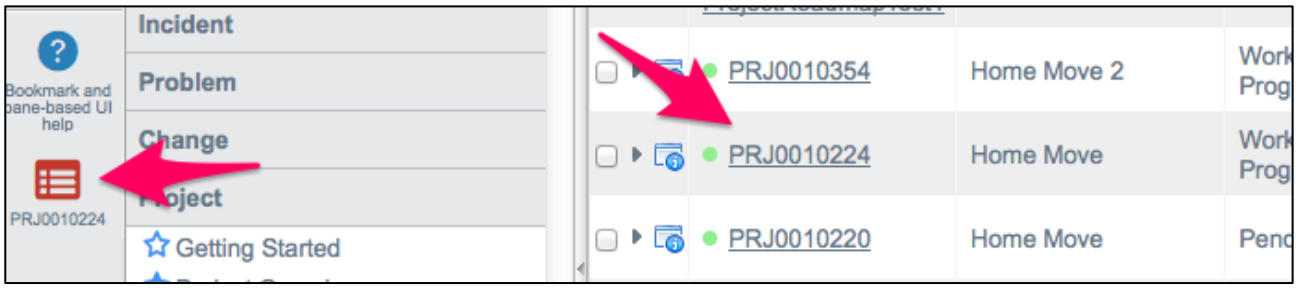
- Create a bookmark for our project
- Create the initial baseline

Create a Bookmark for a Project

1. In the left Navigation Pane, click **Project** to expand the Project application.

2. Click the Projects > All module to display the Projects list of all projects, in the main pane of the browser.

3. Left click and hold the HOME MOVE project, drag it over to the left edge, just under **Bookmark and pane-based UI help**.



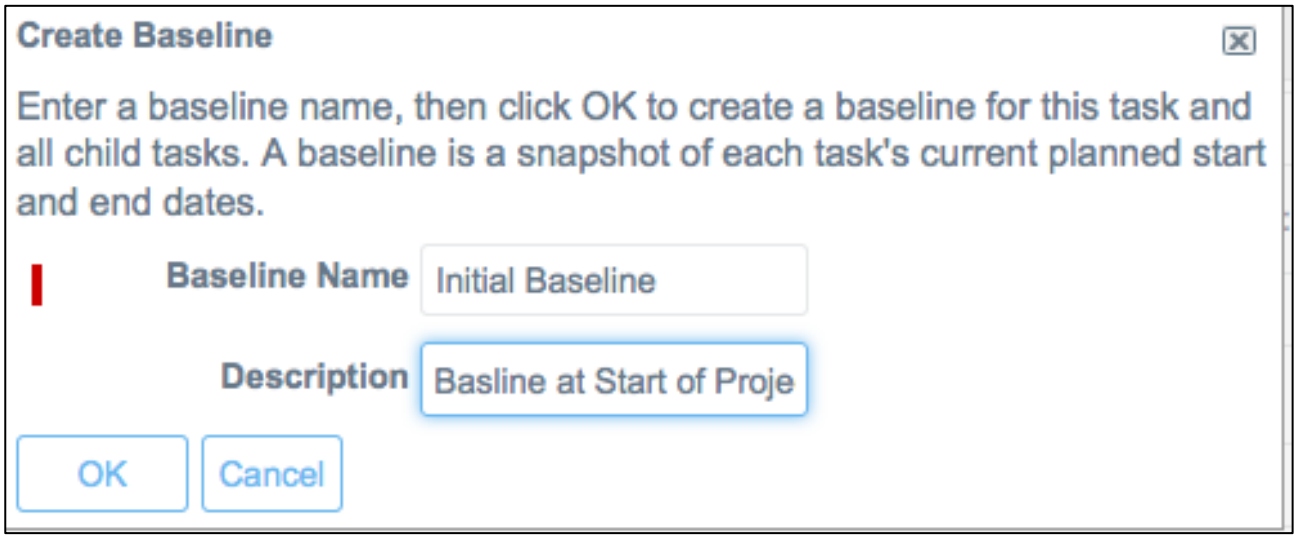
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Create the Initial Baseline

1. Select and click the **HOME MOVE** project **bookmark**.

2. Click the **Create Baseline** related link.

3. A dialog box appears.



4. Enter

   name: **Initial Baseline**
   description: **Baseline at Start of Project**

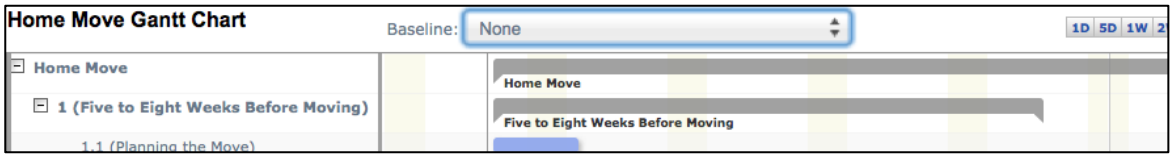
5. Click **OK**.

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View the Baseline

1. Click the **Create Baseline** related link.

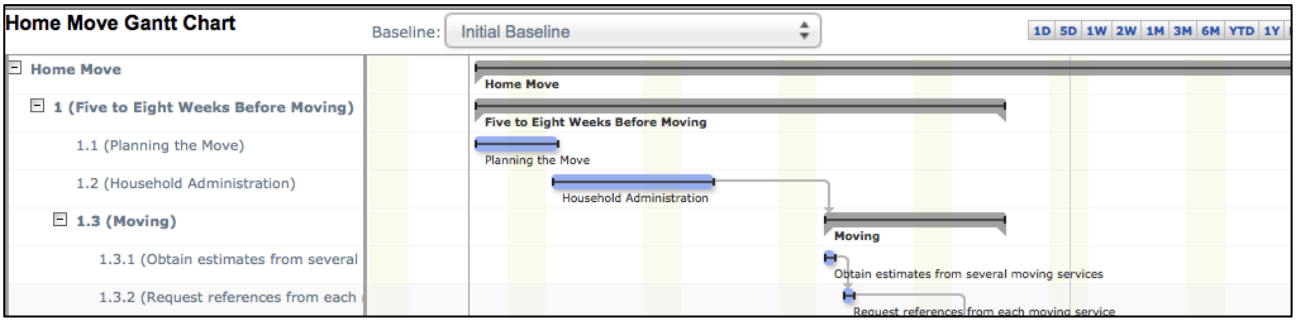
2. Select the baseline from the Baseline list at the top.



Lab Success Verification

The Gantt chart should look similar to the example below.

The black lines represent planned dates; the task bars represent the actual dates. In a future lab you create another baseline and can see changes in the project.



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Lab Goal 9

Lab 9
Start a
Project

Starting a project is the next step after setting up the project with project tasks and assigned resources.

A project can be started one of two ways:

- Click the **Start a Project** button
- Change the **State** field on the Project or Project Task to **Work in Progress**

This lab explains how to:

- Copy the HOME MOVE project to start a project using both methods
- Start a project by clicking the **Start a Project** button
- Start the project by updating a project task

Copy a project

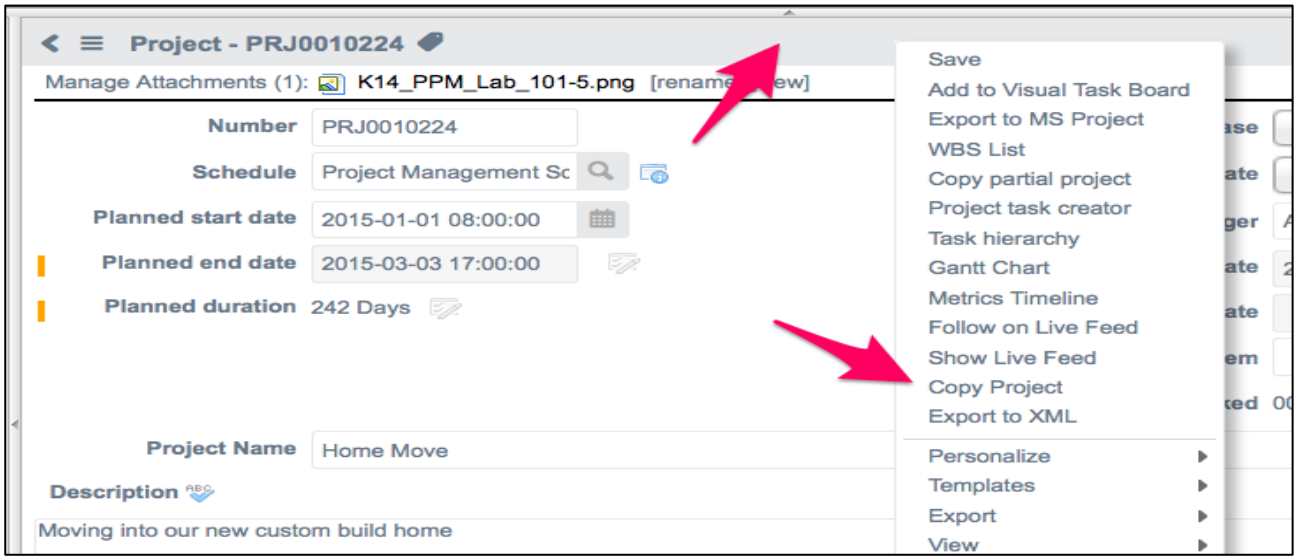
1. In the left Navigation Pane, click **Project** to expand the Project application.

2. Click the **Projects > All** module to display the Projects form in the main pane of the browser for all projects.

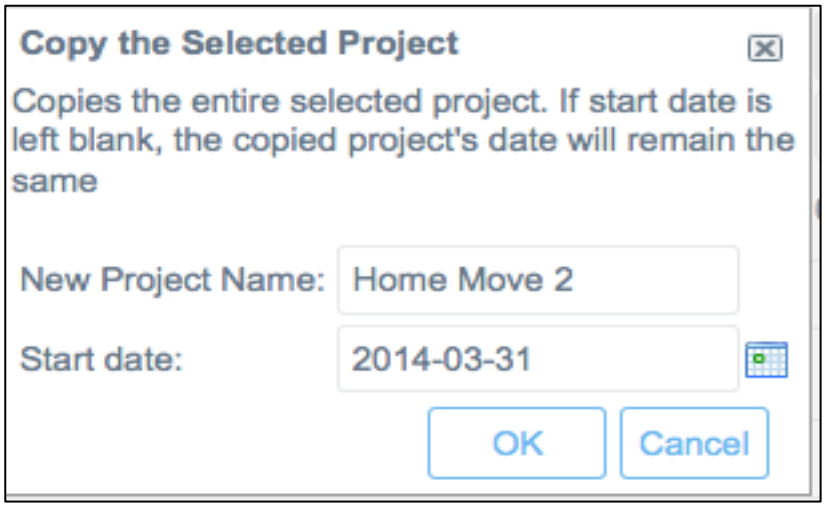
3. Select and click the HOME MOVE project to open.

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4. In the Project form, **right-click** the header bar and select **Copy Project**.



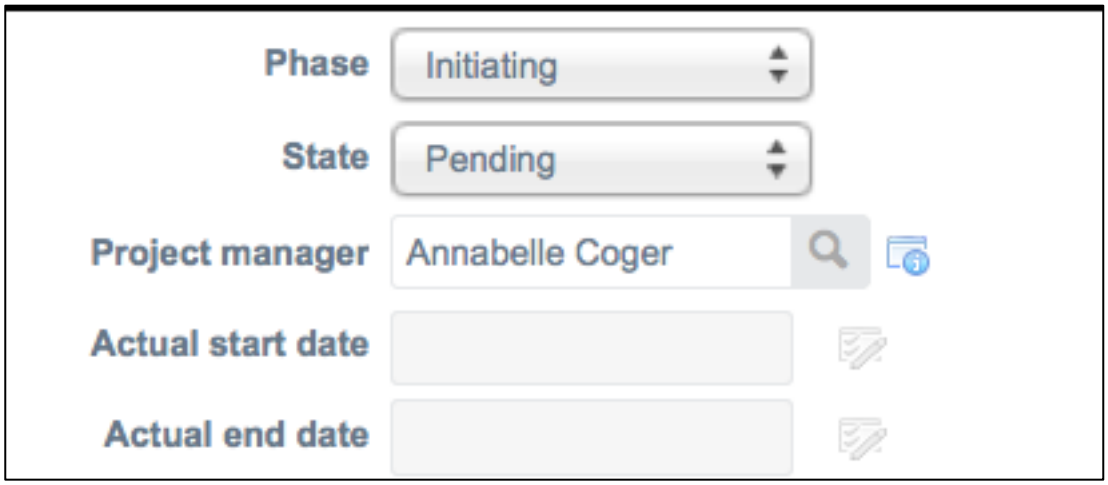
5. Enter **Home Move 2** for the **New Project Name** of the new project that you are creating.



6. Click **OK**. The system creates the new project. Verify the open project is the new one **Home Move 2**.

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7. Review the project form – What is the **Phase**? What is the **State**? What is the **Actual Start Date**?

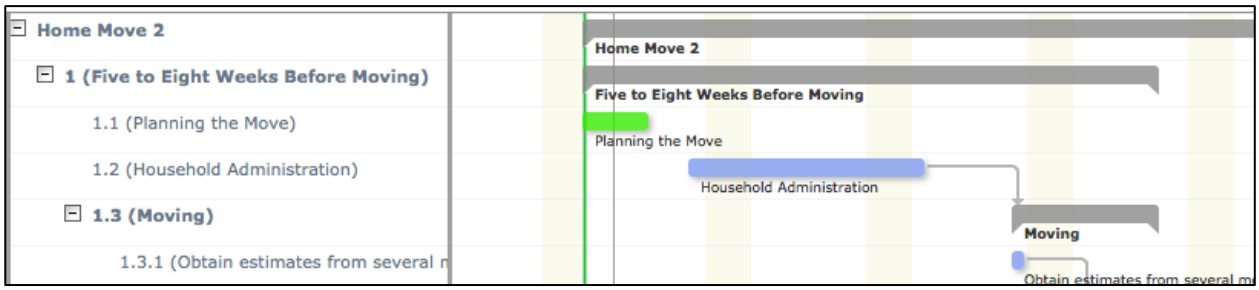


Start a Project from the Project Form

1. On the **Home Move 2** project form, click **Start Project**.

2. Now review the project form - What is the **Phase**? What is the **State**? What is the **Actual Start Date**?

3. Look at the Gantt chart. The first task has change colors to green. Why?



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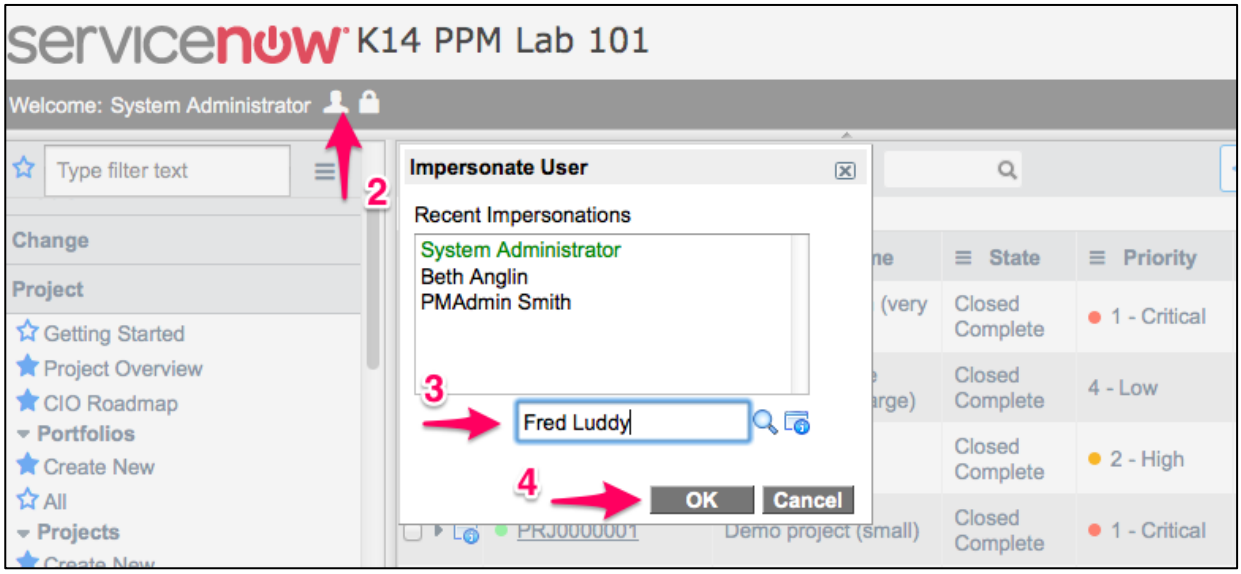
Starting a Project from a Project Task

1. Impersonate **Fred Luddy**.

2. Select the impersonate key on the top left navigation pane.

3. In the impersonate User popup window, type in **Fred Luddy**.

4. Click **OK**.



1. In the Left Navigation Pane, click **Project** to expand the Project application

2. Click the **Projects > All** module to display the Projects form in the main pane of the browser for all projects.

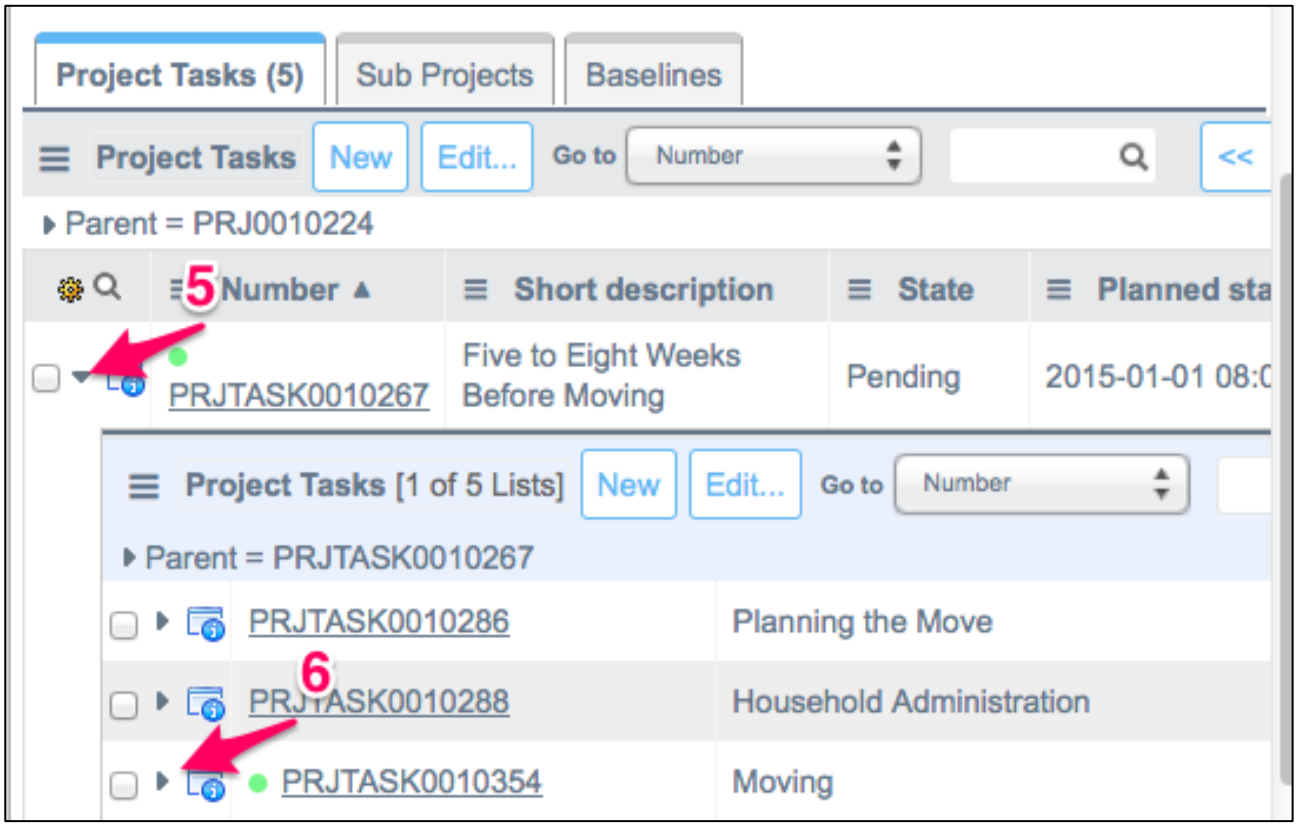
3. Select and click the **HOME MOVE** project to open it.

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4. Scroll to the bottom of the project form and select the **Project Task** tab.

5. Expand the Home Move **Five to Eight Weeks Before Moving** task to view it's child project tasks.

6. Expand the **Moving** project task.



7. Select the Project Task Number for the **Select moving service** project task.

8. Verify the project task is assigned to Fred Luddy.

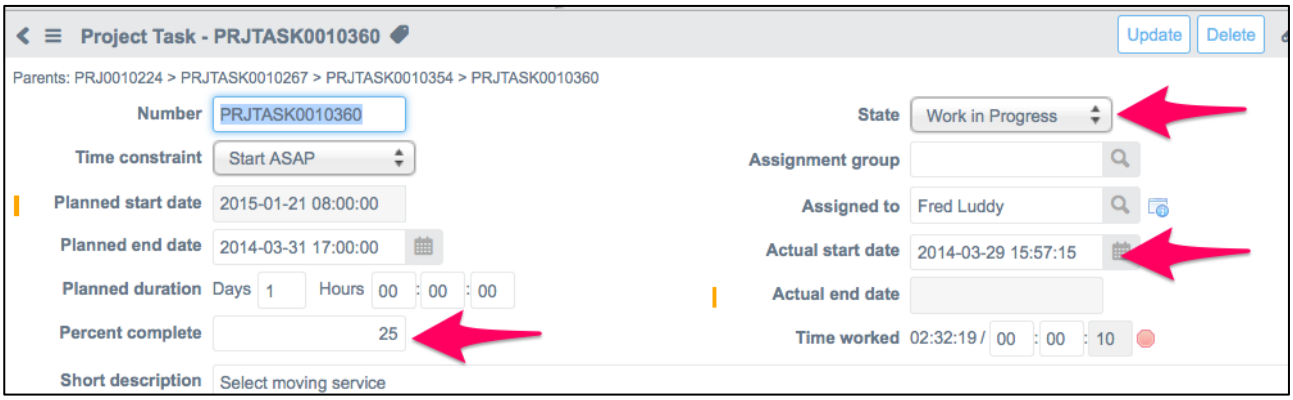
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Project team members update project task status and actual effort so that accurate project status details are available to project manager and stakeholders on a timely basis. With ServiceNow, the project team member views a familiar form for ease of updating project tasks.

9. Update the **Select moving service** task with a **Percentage complete** of **25**

10. **Right-click** the project task header and **Save** the project task

The project task State changed. Actual start date is updated with today's date.

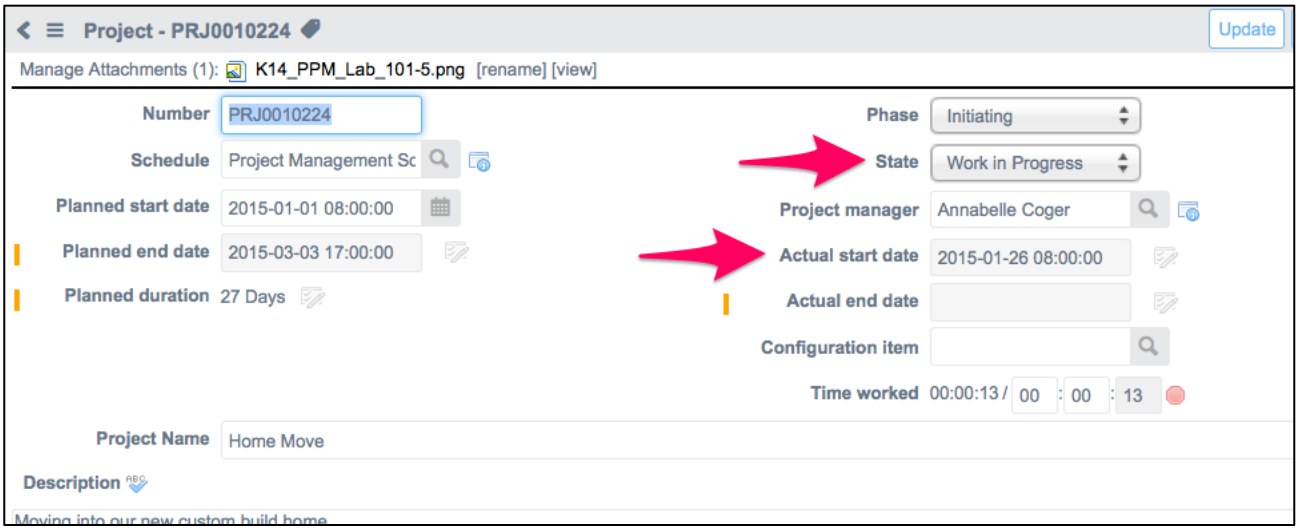


11. Click **Update**.

    If you are not taken back to the Project form, find the related list for Redirect to top task just above the Gantt chart. Click it and be redirected to the Project form.

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Note: The Project has been updated too. The Project has been started – **State** changed and **Actual Start Date** changed. Your project will have a different **Actual Start Date**.



12. Review the **Gantt chart**.

    It might be a little messed up because of the start date for the **Select a moving service.** Is the project task **green**?

13. Go back into the **Select a moving service** project task (follow the steps above if needed).

14. Change the **Actual start date** to **2015-01-26 08:00:00**.

15. Click **Update**.

    If you are not taken back to the Project form, find the related list for Redirect to top task just above the Gantt chart. Click it and be redirected to the Project form.

16. On the **Project** form – did anything change?

17. Review the **Gantt chart** – did it change?

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18. Go back to the **Select a moving service** project task.

19. Change the **Percentage complete** to 100.

20. Change the **Actual end date** to **2015-01-28 17:00:00**.

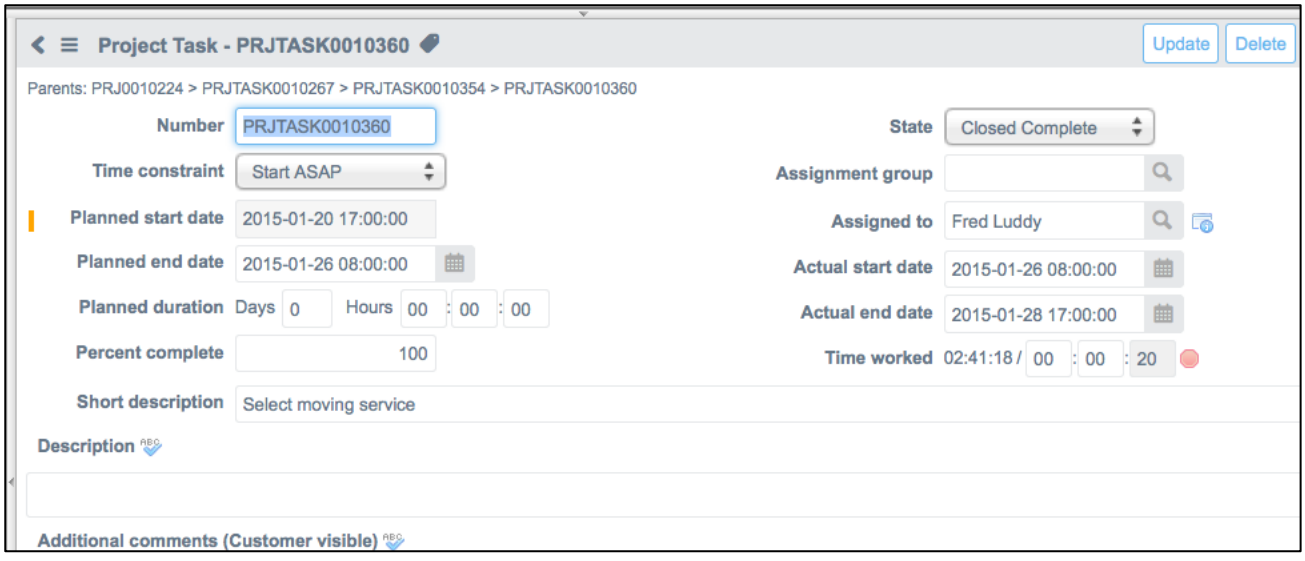
21. Click **Update**.

    If you are not taken back to the Project form, find the related list for Redirect to top task just above the Gantt chart. Click it and be redirected to the Project form.

22. On the **project** form, review the **Gantt chart**. What changed? Why?

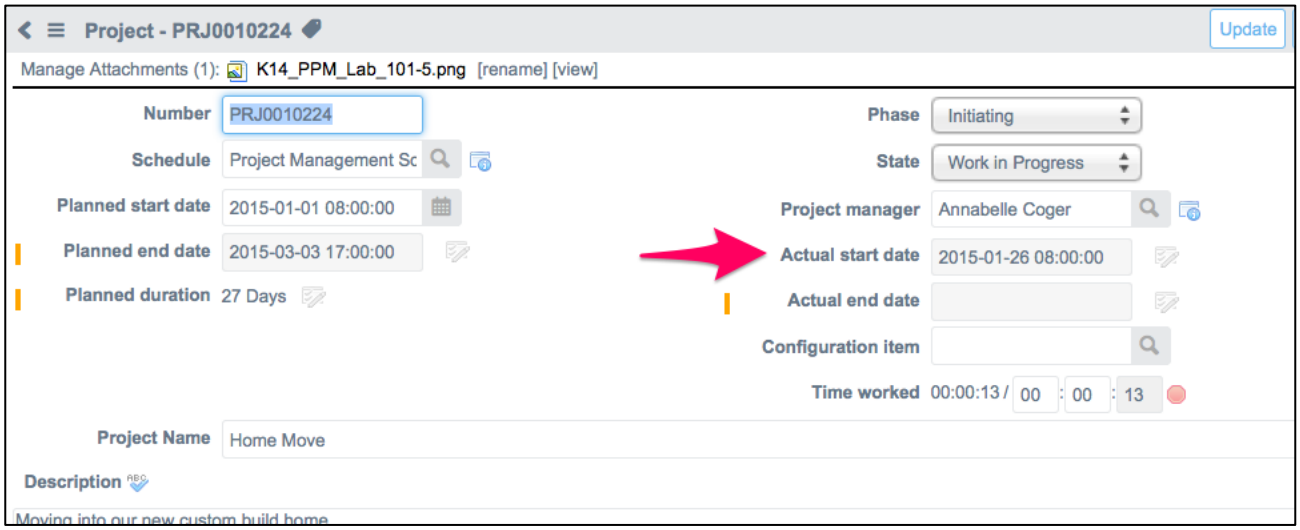
Lab Success Verification

1. You should now see that the Project Task has a **State** of **Closed Complete**.

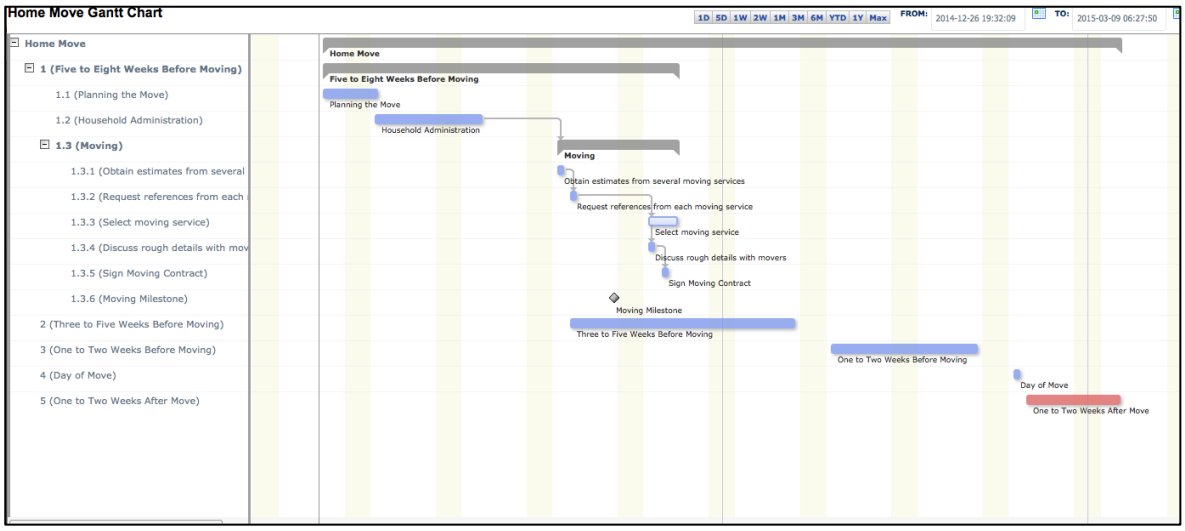


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2. Project has a different **Actual start date**:



3. The Gantt Chart should look similar to the example below.



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Lab Goal 10

Lab 10 Link a Change to a Project

The capability to link an existing change request to a project task or create a new change request directly from a project task exists in ServiceNow today. A new project task link record is created when you link a project task to a change request record. The project task link copies over all the attributes of the change request record and the change record becomes a child task a of the project task that you linked to the change request. Note to that the rules that govern the relationship between the project task and the project task link are the same as the rules for all parent and child tasks.

This lab explains how to:

- Link an existing change to a project
- View the relationship in the Gantt chart

Log on to Your Lab Instance

1. Your instance URL is on the cover page.

2. Login using the **admin** credentials provided on the cover.

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Linking an Existing Change to a Project

1. Navigate to **Project > Project > Pending**.

2. In the right panel, locate a project that has a green dot.

3. Click the **ARROW** in the first column next to the **Project Number**.

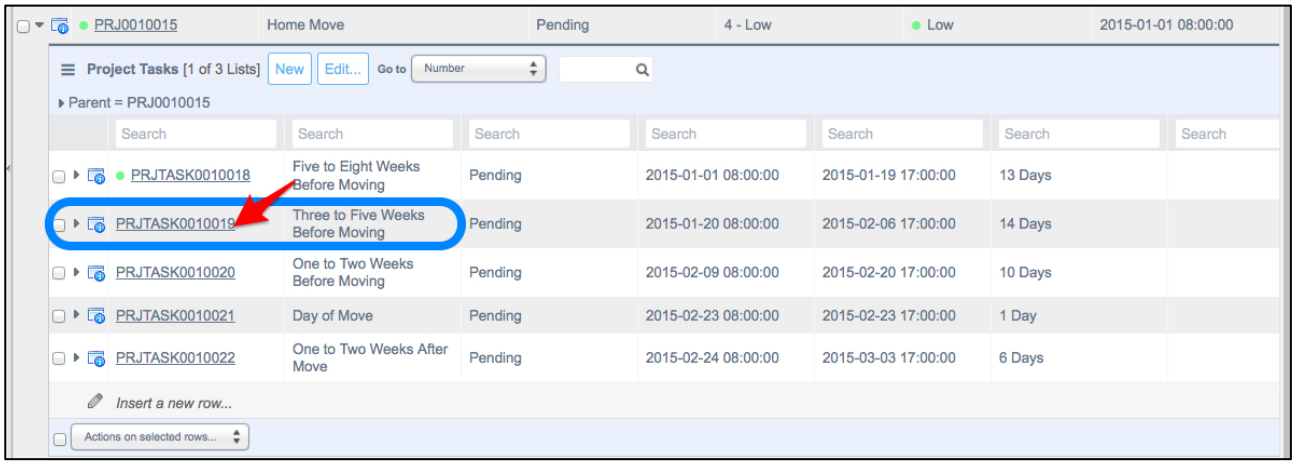


Note: The green dot means that the Project has Project Tasks.

4. Find a project task that **DOES NOT** have a green dot.

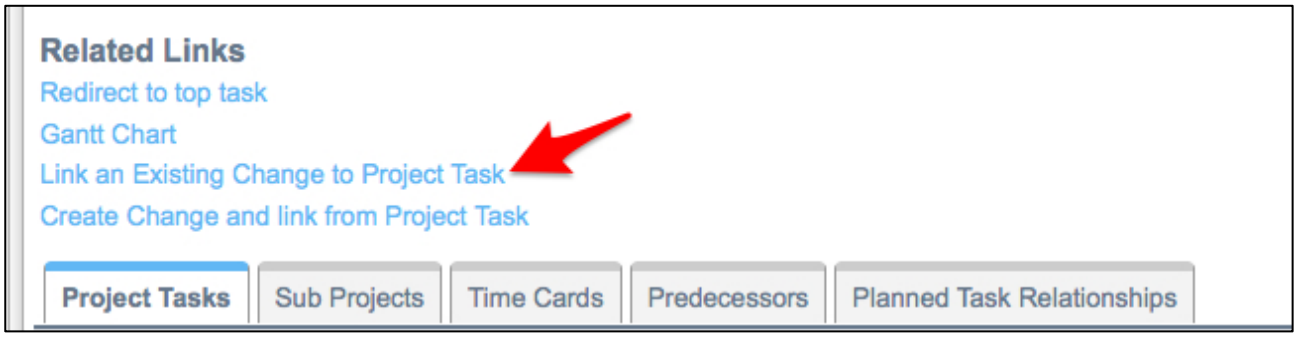
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5. Click the **Number** of the project task.



6. Scroll to the Related Links section of the project task form.

7. Click the **Link an Existing Change to Project Task** entry.

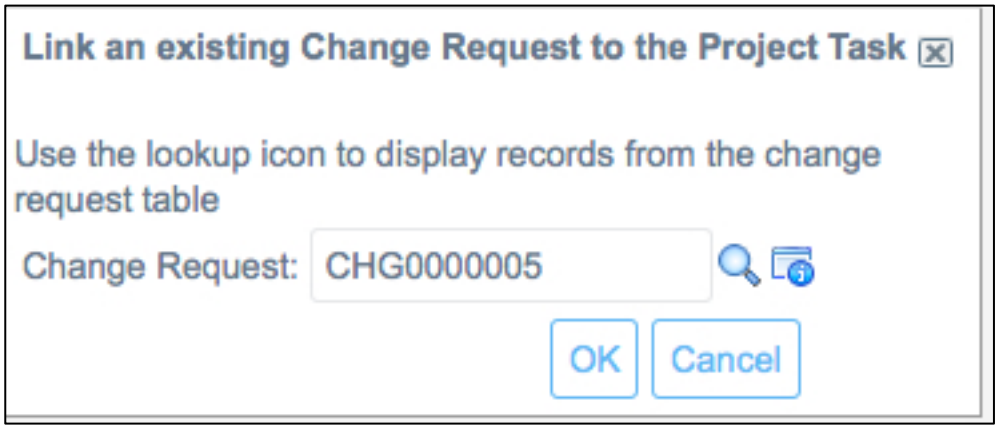


8. In the “Link an existing Change Request to the Project Task” popup.

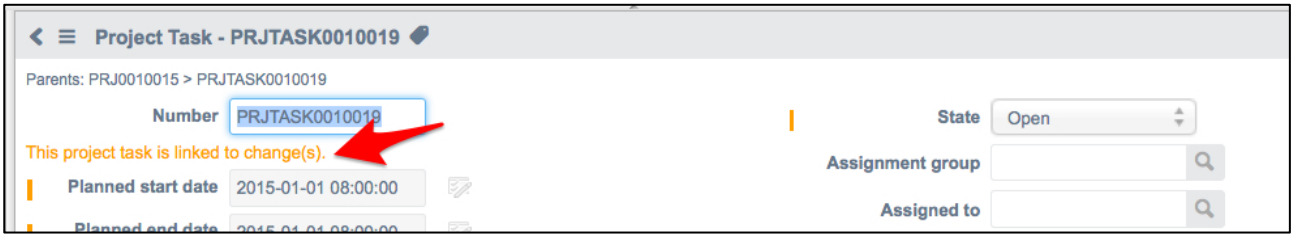
9. Select the **Change Request** – choose any change request for this lab.

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10. Click **OK**.



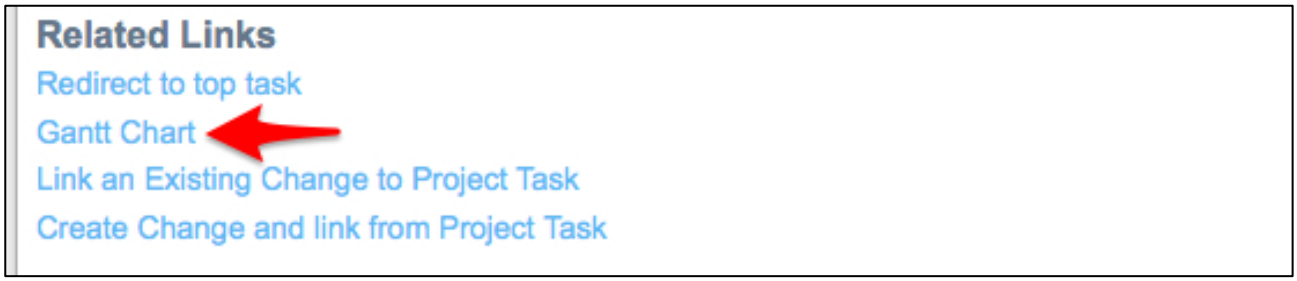
Notice the orange message by the NUMBER field. Message tells you a change has been linked to this project task.

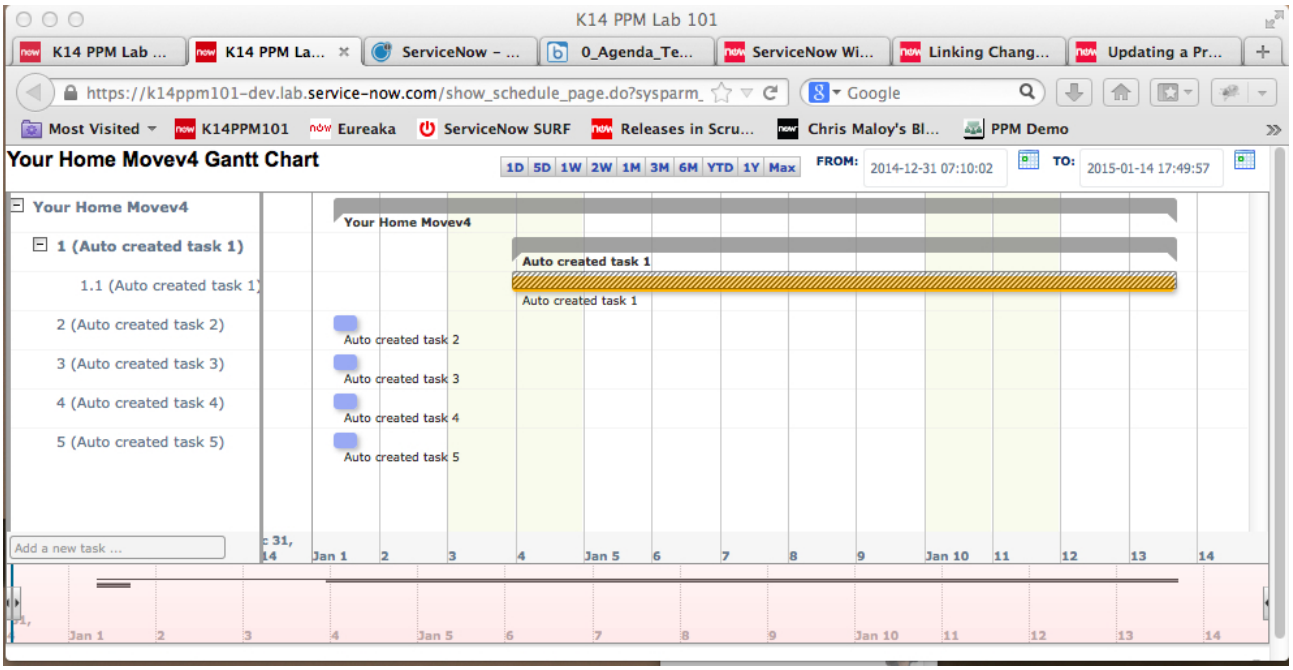


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View the Relationship in the Gantt Chart

1. Another view is the Gantt chart. Select the related link for a Gant chart.





The orange task 1.1 is the Change Request that is linked to the project task.

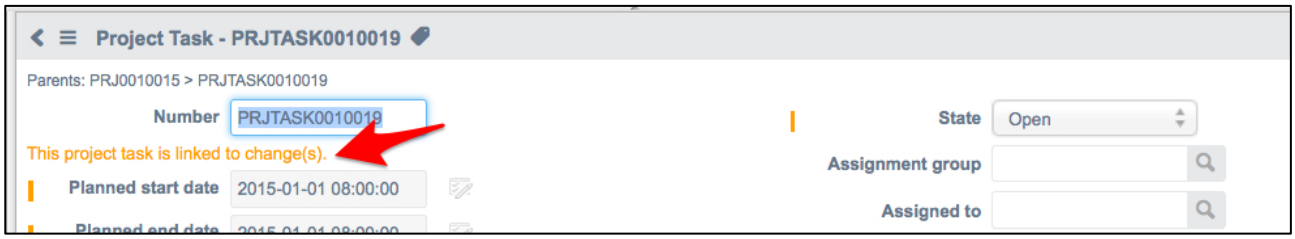
Note: If the state of a change request changes to **Pending, Open,** or **Work in Progress,** the state of the project task link changes accordingly. If the state of the change request changes to any **of** the closed states, the state of the project task link changes to **Closed Complete.**

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Lab Success Verification

Note: the change request updates the project **task start date**, **end date**, and **duration;** and it changes the state of the project task.

1. The screen should look similar to the example below:



Additional information:
http://wiki.servicenow.com/index.php?title=Linking_Changes_to_Project_Tasks

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Lab Goal 11

While a project is underway, keep actual values as current as possible. Continue to measure actual values, analyze the impact of any potential project risks, and make adjustments to handle scope, cost, and schedule accordingly.

Lab 11
Managing a project

Managing a Project

While the status of the **project** is **Work in Progress**:

1. Close a project task (any task – just pick one).
2. Change the percentage complete to 65% on any one task.
3. Assign a project task to an assignment group.
4. Change the State from Pending to Work in Progress on 2 tasks.
5. Create two milestones.
6. Review your changes by looking at the Gantt chart.

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Lab Goal 12

Every project has a definite beginning and a definite end. The purpose of closing a project is to confirm the completion of all project processes and activities. When you close a project, all project tasks are closed automatically.

The project will automatically be set to a “Closed Complete” state, if all of its tasks and milestones are set to one of the closed states.

This lab explains how to:

- Close the project
- Create a baseline
- Review the Gantt chart and baselines

Lab 12
Closing a project

Close the Project

1. Verify you are signed in as Administrator and not impersonating anyone

2. Click your **bookmark** for “**Home Move**” project

3. On the project form, change the **State** field to one of the closed states:

   Closed complete: the project is finished and all tasks are complete

   Closed incomplete: the project is finished, but tasks remain unfinished

   Closed skipped: the project was abandoned

4. Verify that all the project tasks were closed. The Closed state “trickles down” to the child tasks

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5. Create a Baseline.

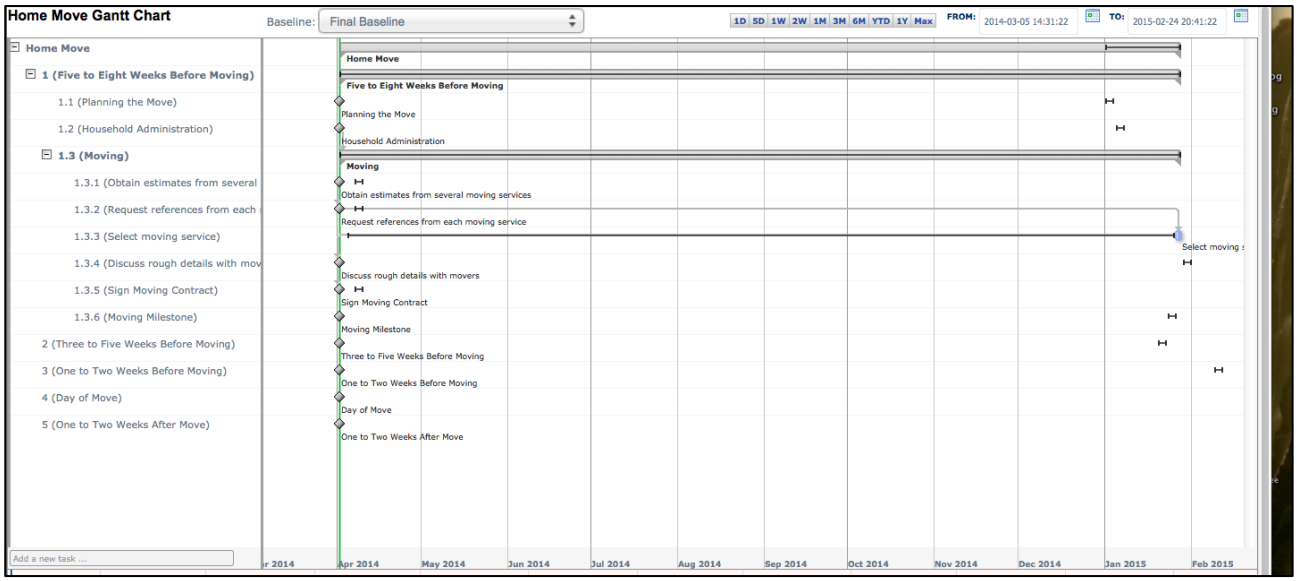
   Name this one – Final Baseline

6. Open the project's Gantt chart.

7. Compare the project to the different baselines. Since you closed the project today, your project tasks will be ahead of the **Initial Baseline**.

Lab Success Verification

1. The Gantt chart should look similar to the example below.



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Resources

Project Management: ServiceNow Wiki

https://wiki.servicenow.com/index.php?title=Project_Management

ServiceNow Wiki – get the project management book

https://wiki.servicenow.com/index.php?title=Book:Project_Management

Project Management Institute (PMI):

http://www.pmi.org/

Voices on Project Management:

http://blogs.pmi.org/blog/voices_on_project_management/

Best Project Management Blogs:

http://pinterest.com/barryhodge/best-project-management-blogs/

The PM Coach:

http://thepmcoach.pmbookclub.com/2012/12/project-management-blogs-you-should.html

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