knowledge14®

April 27–May 1, 2014 • Moscone Center • San Francisco, CA

PPM – Create your first Project

Emily McMullin
Sr. Solution Consultant
ServiceNow

Molly Feterl
Sr. Technical Consultant
ServiceNow

servicenow®

© 2014 ServiceNow All Rights Reserved

Agenda

Overview

Initiating - Creating a Project

Planning - Creating Project Tasks

Executing & Monitoring and Controlling – Starting , and Managing

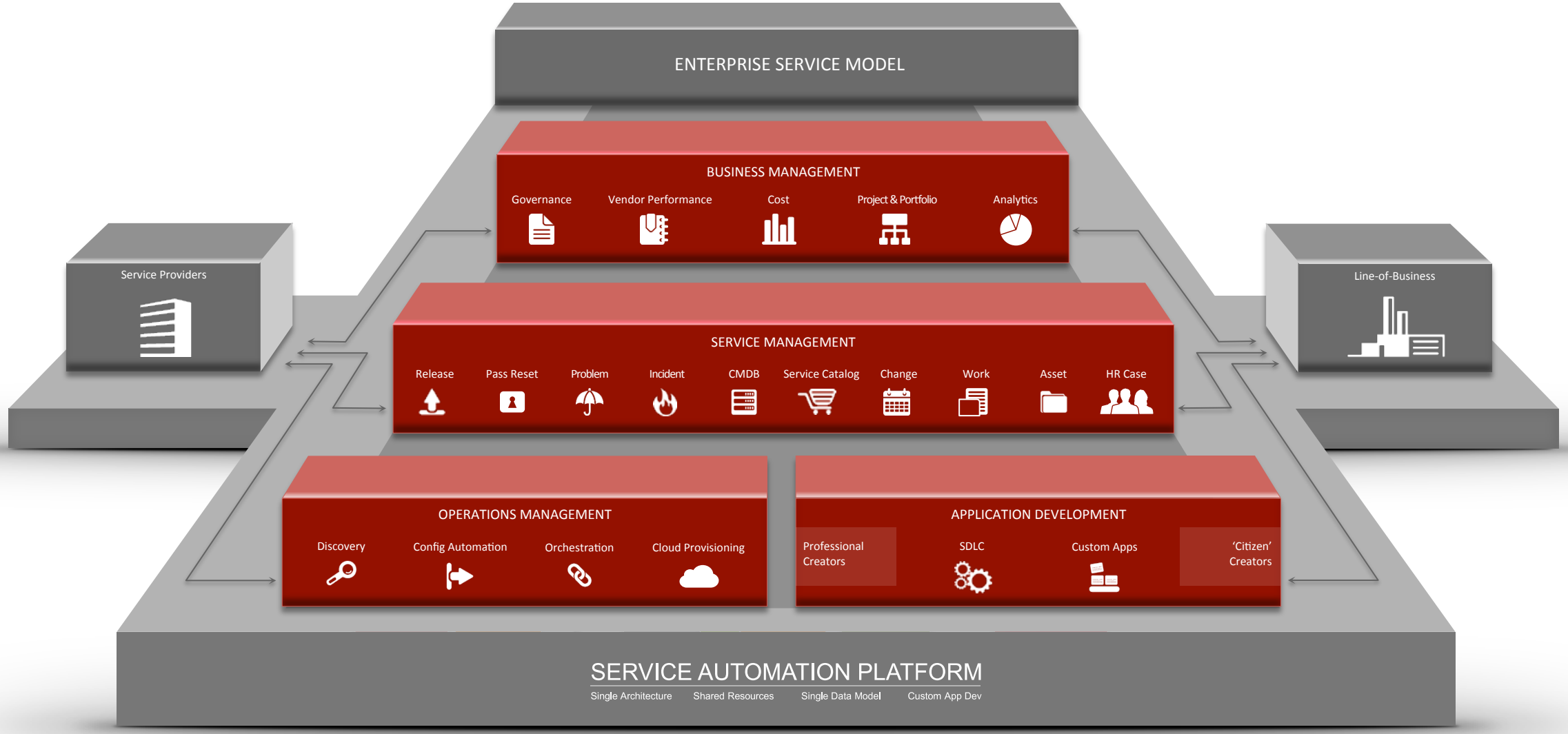
Closing - Lists, Reports, Dashboards

© 2014 ServiceNow All Rights Reserved

Overview

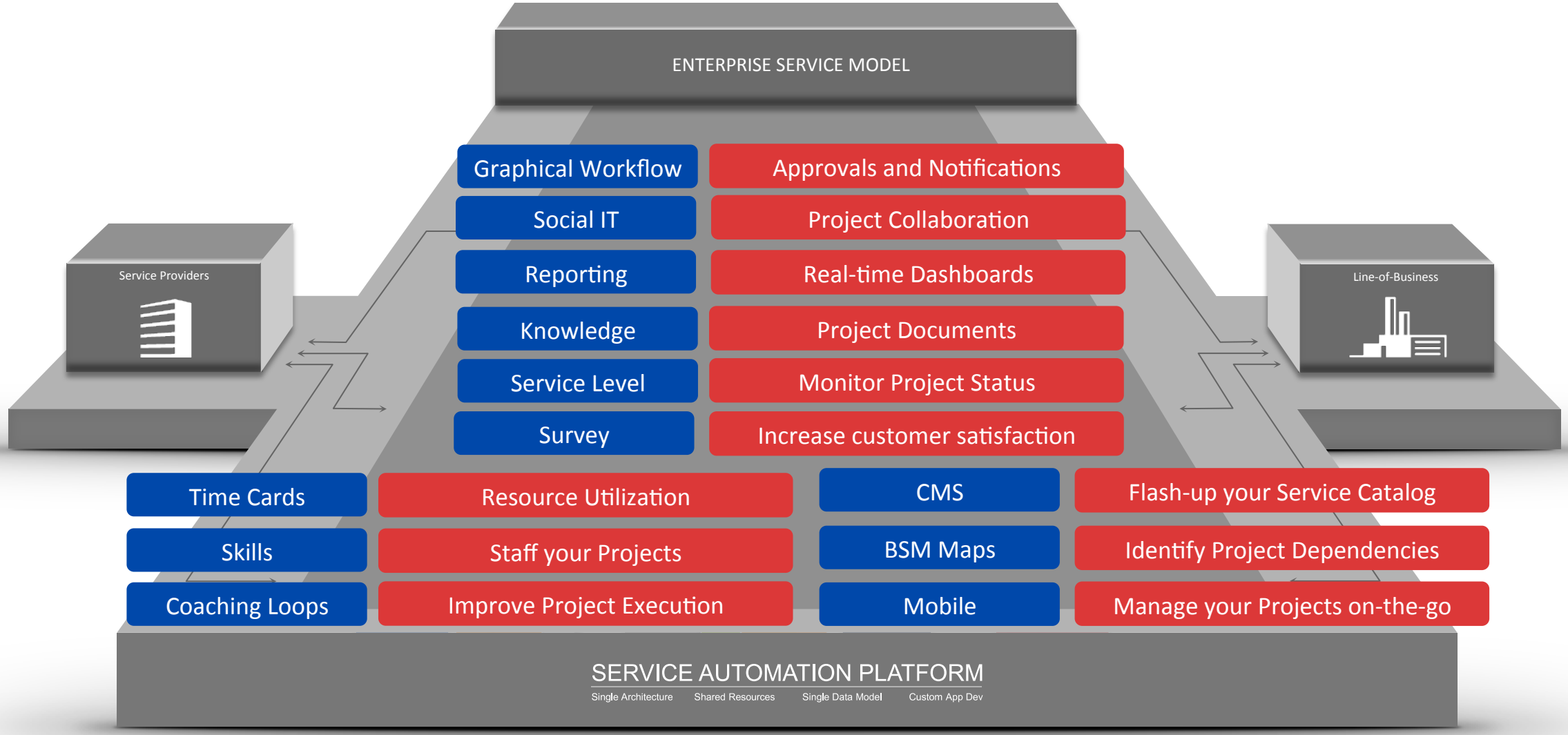
© 2014 ServiceNow All Rights Reserved

ServiceNow – Service Automation Platform



© 2014 ServiceNow All Rights Reserved

PPM and the ServiceNow Portfolio



© 2014 ServiceNow All Rights Reserved

Service Lifecycle

Demand from the Business

Grow & Transform the Business

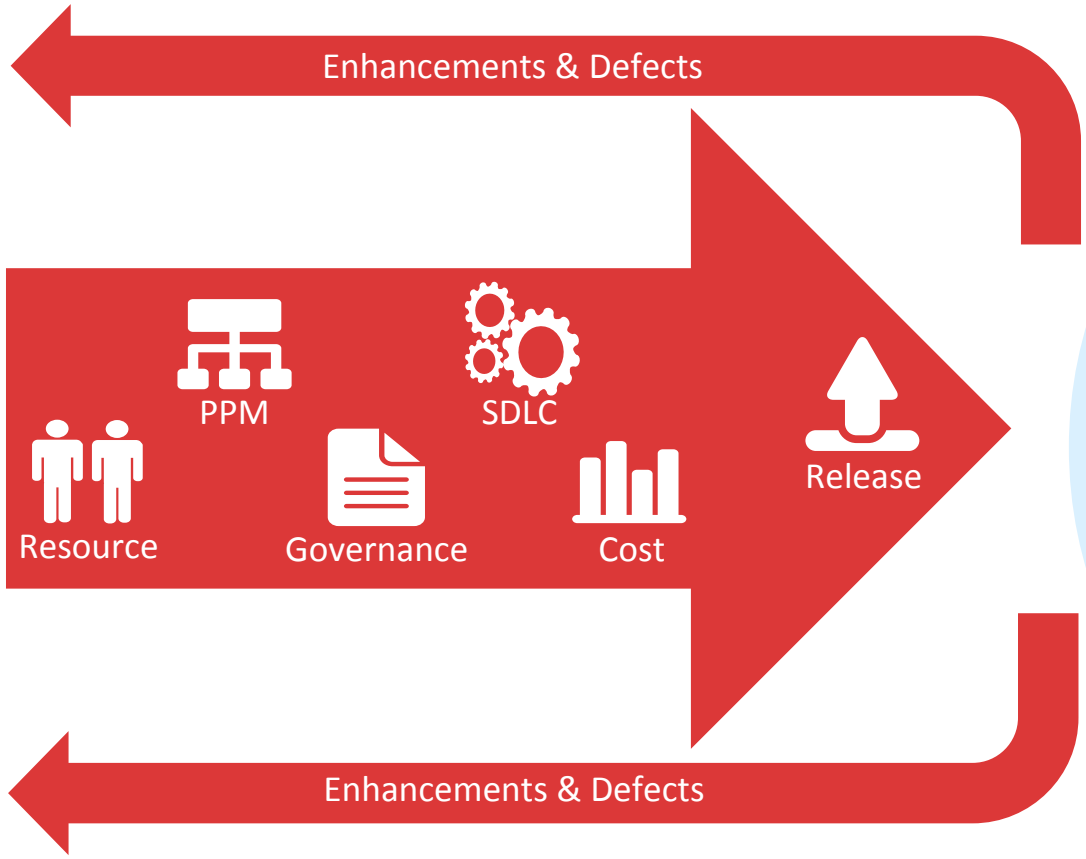
Run the Business

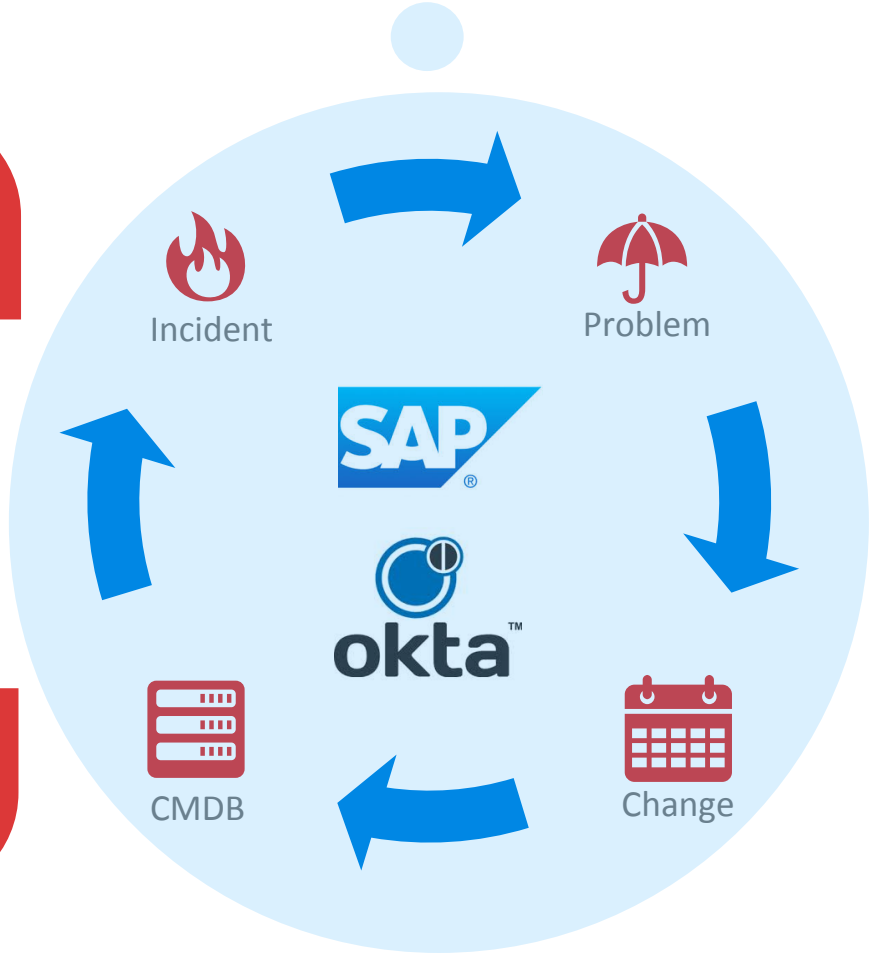
Request: Project

Displace NetSuite with SAP ERP

Request: Project

Implement Okta for IDE





© 2014 ServiceNow All Rights Reserved

Questions?

© 2014 ServiceNow All Rights Reserved

Project Management Overview

"Project management is the application of knowledge, skills, tools and techniques to project activities to meet the project requirements."[3] This workshop considers how ServiceNow supports project management through the appropriate application and integration of the five project management process groups:

- Initiating
- Planning
- Executing
- Monitoring and Controlling
- Closing

© 2014 ServiceNow All Rights Reserved

Project Management Goal

*The primary **goal*** of project management is to apply the appropriate knowledge, tools and techniques to project activities in order to meet project requirements.

© 2014 ServiceNow All Rights Reserved

Project Management Objectives

Implement the right processes at the right time

Facilitate project communications

Manage stakeholder expectations

Balance scope / budget / schedule demands



© 2014 ServiceNow All Rights Reserved

Project Process

Phases and Process Groups (aka Process Groups and Subject Groups)



Processes: Integration, Stakeholder, Scope, Resource, Time, Cost, Risk, Quality, Procurement, Communication

© 2014 ServiceNow All Rights Reserved

Overview – General Terms

- Project Management
  - application of knowledge, skills, tools, and techniques to project activities to meet the project requirements."[1]
- Project
  - a temporary endeavor with a defined scope of work and defined start and end points to create a unique product, service, or result that may be tangible or intangible.
- Program
  - a group of related projects, subprograms, and program activities managed in a coordinated way to obtain benefits not available from managing them individually. [1]
  - A project may or may not be part of a program but a program will always have projects. [1]
- Portfolio
  - projects, programs, sub portfolios, and operations managed as a group to achieve strategic objectives. [1]

© 2014 ServiceNow All Rights Reserved

Project Management Terms

Terms	Definitions
Gantt Chart	Bar chart that illustrates a project schedule including task start/finish dates
Project Task	An activity that needs to be accomplished within a defined period of time
Time Constraint	Task Start Date Calculation: ASAP or Start on Specific Date
Critical Path	Longest necessary path through a network of interdependent activities
Dependencies	Link amongst a project's terminal elements (tasks)
Project Phases	A major logical grouping of work on a project
Milestone	Event put before the end of a phase so corrective actions can be met and deliverables can be completed in time
Baseline	Related list of Baseline Items that records every task associated with the top planned task
Resource Timeline	Graphical, interactive map that establishes the relationships of tasks and sub-tasks to user resources for a project
ROI%	Calculated automatically using the (net value/estimated cost) x 100 formula
Percent Complete	% Completion for a task or project shown in a form /on progress bar in a list
Parent/child Relationships	Structure for building project hierarchy (phases and tasks) utilizes the parent field on the *task* table

http://en.wikipedia.org/wiki/Glossary_of_project_management

© 2014 ServiceNow All Rights Reserved

Overview – Personas / ServiceNow Roles

PPM Personas

Chief Information Officer



Description:
Responsible for the technology direction of the company

Role:
Portfolio User

Director of PMO



Description:
Create best practices and enforce policies across all projects

Role:
Portfolio User

Project Manager



Description:
Directs & manages projects

Role:
Project Manager

Task Resources



Description:
aka – Team Members; execute project tasks

Role:
Project User

© 2014 ServiceNow All Rights Reserved

Questions?

© 2014 ServiceNow All Rights Reserved

Project Application Administration

Lab 1 & Lab 2

© 2014 ServiceNow All Rights Reserved

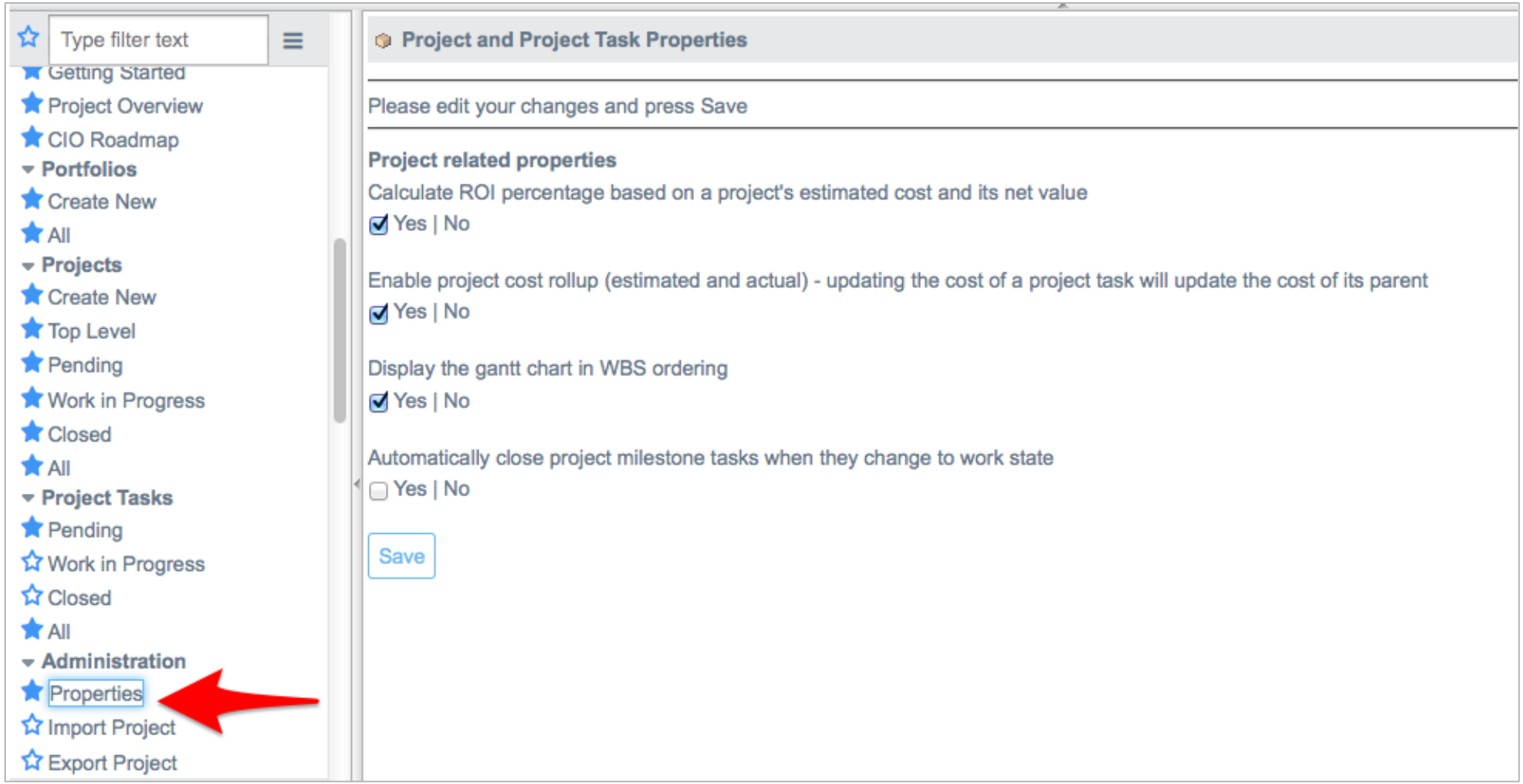
Project Application Administration

Lab 1 Project Properties

- Setup Project Application
- Administration > Properties
  - Calculate ROI
  - Project Cost Rollup
  - Gantt chart in WBS view

© 2014 ServiceNow All Rights Reserved

Project Properties Set up



© 2014 ServiceNow All Rights Reserved

Related List

Lab 2

- Project Task Form
  - Add 2 Related Lists
    - Predecessors (*Planned Task Relationship – Child*)
    - Planned Task Relationship (*Planned Task Relationship – Parent*)

© 2014 ServiceNow All Rights Reserved

Initiating - Creating a Project

Lab 3

© 2014 ServiceNow All Rights Reserved

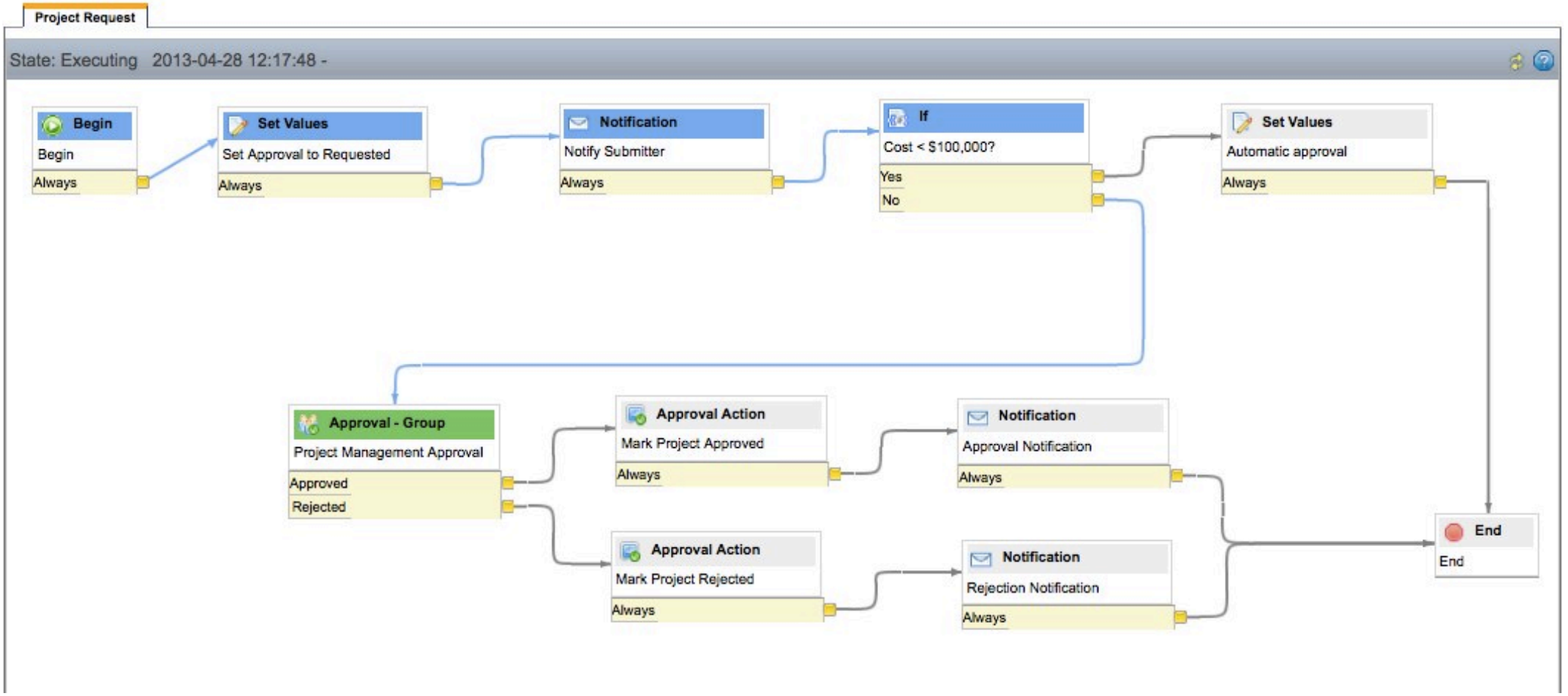
ServiceNow Project Attributes

- Phase
  - Initiating, Planning, Executing, Monitor & Control, Closing
- States
  - Pending, Open, Work in Progress, Closed Complete, Closed Incomplete, Closed Skipped
- Approval State
  - Not Yet Requested, Requested, Approved, Rejected
- Schedule
  - PPM Schedule is the default
- Project Tasks
  - Project work assigned

© 2014 ServiceNow All Rights Reserved

Workflow

Process Automation



© 2014 ServiceNow All Rights Reserved

Different ways to Initiate a Project

- Propose a Project
  - Service Catalog Request
- Create a new project
  - Create a project manually
  - Copying a project
  - Creating a project from an Incident, Problem or Change
  - Importing MS Project files
  - Sub-Projects

© 2014 ServiceNow All Rights Reserved

Propose a Project

Lab 3 – Part I

Use the Service Catalog to submit a project request:

1. Navigate to **Self-Service > Service Catalog**.
2. Click the **Can we help you?** link.
3. Click **Propose a New Project**.
4. Fill out the project form.

© 2014 ServiceNow All Rights Reserved

Propose a Project (Catalog form)

Service Catalog > Can We Help You? > Propose a New Project

Propose a New Project



Please describe the details of the project using the fields below. Upon receipt, the Project Office will review your request and contact you to discuss the next step.

Name

3rd Annual Holiday Party

Estimated start date

2014-08-01 13:20:19

Estimated end date

2014-12-13 13:20:42

Estimated cost

150000

Description

Celebrating 3rd annual holiday party in Kauai, Hawaii for 50 service management employees and their spouses or significant others

Submit

© 2014 ServiceNow All Rights Reserved

Create a Project manually

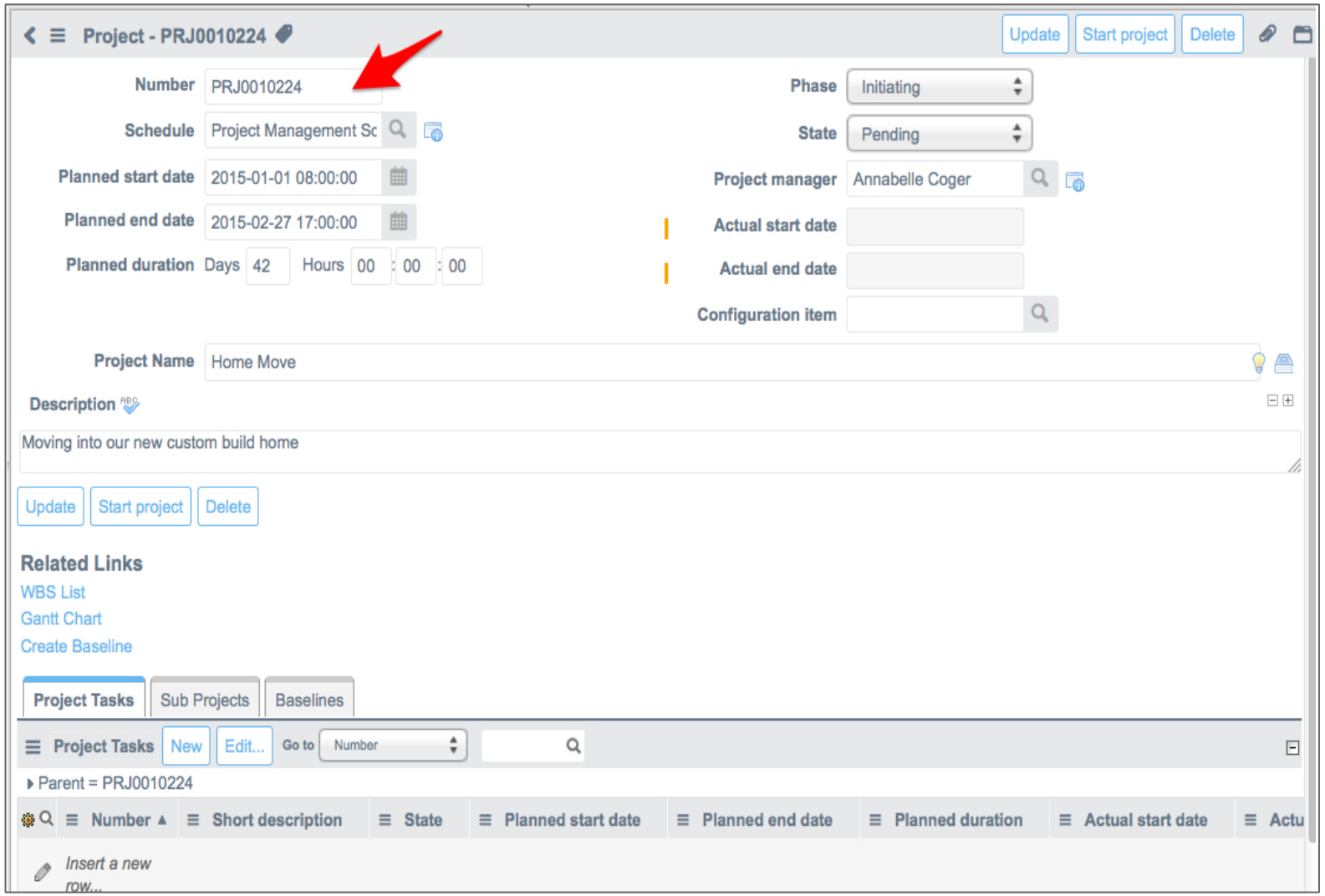
Lab 3 –Part II

- To create a new project:

1. Navigate to **Project > Projects > Create New**. The Project form appears with some pre-populated data and in the last view selected. Project forms have the following views:
   - **Default view:** shows a basic set of form fields needed to start a project.
   - **Advanced:** shows cost-related fields and other special fields like **Actual effort** and **Actual cost**.
   - **WBS:** shows the WBS List related list.
2. Fill out the Project form (see table).
   - Schedule
   - Duration
3. Click **Submit**.

© 2014 ServiceNow All Rights Reserved

Create Project Manually



© 2014 ServiceNow All Rights Reserved

Questions?

© 2014 ServiceNow All Rights Reserved

Planning

Lab 4, 5, 6 & 7

© 2014 ServiceNow All Rights Reserved

Planning the project tasks

- Tasks: Units of work that make up the project
  - The project should be broken down into several large task, phases or assignments
  - The large tasks should be broken down into units of work
- Bottom Up
  - Tactical
  - One knows what individual tasks are needed for the project
- Top Down
  - Strategic
  - Build the project with fixed or inflexible time and budgetary constraints

© 2014 ServiceNow All Rights Reserved

Create Project Tasks

Lab 4

- Create Project Tasks manually
- Using the Project Tasks related list
- Use Project Task Creator
- Use Copy Partial Project (copy an existing task)
- Using the Gantt chart
- Inserting a row into the Project Tasks list

© 2014 ServiceNow All Rights Reserved

Time Cards

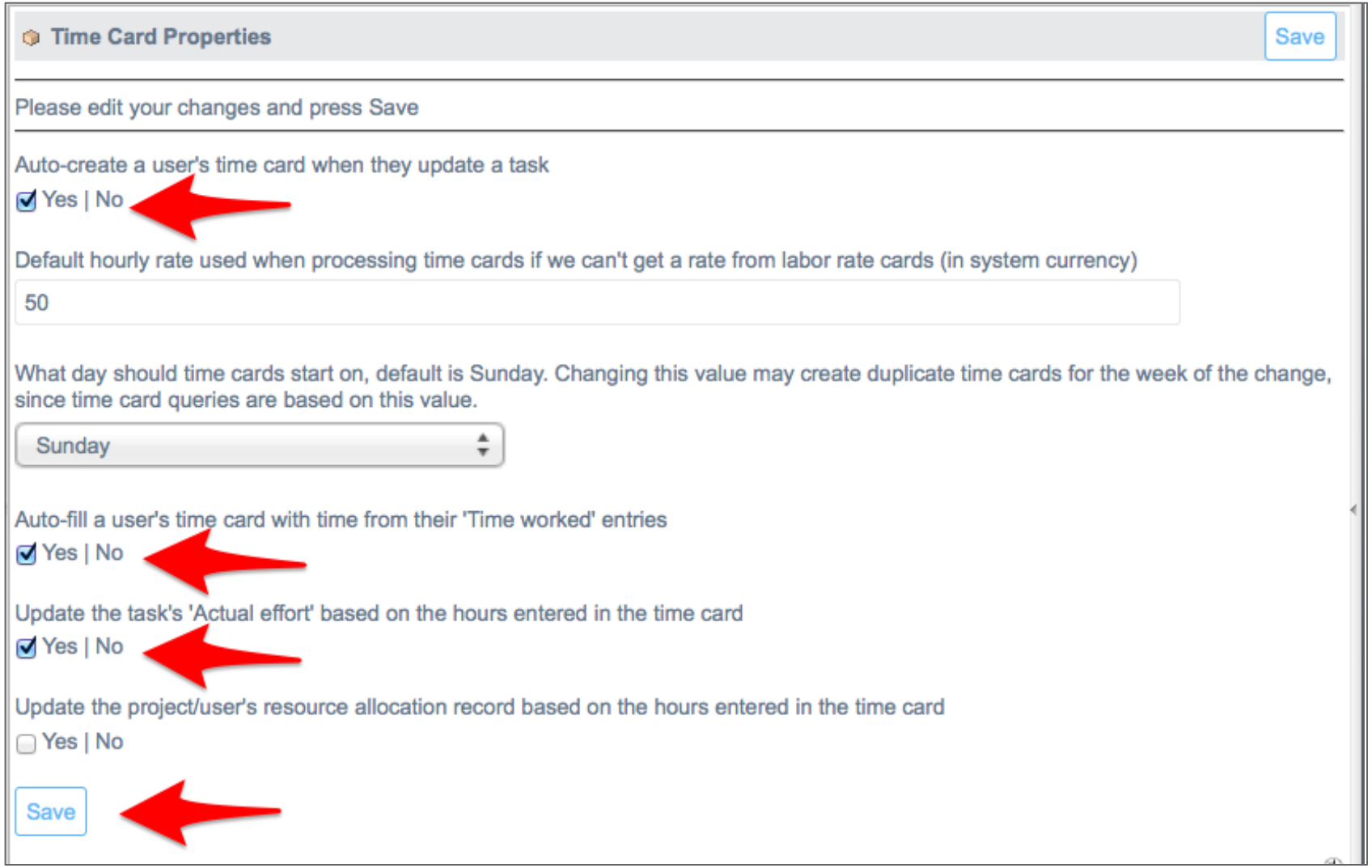
Lab 5

- Time Card
  - Install “Time card management” plug-ins
  - Add “Time worked” field to the Project form

- Time Card Properties
  - Auto-create a user's time card when they update a task
  - Auto-fill a user's time card with time from their 'Time worked' entries
  - Update the task's 'Actual effort' based on the hours entered in the time card
  - Update the project/user's resource allocation record based on the hours entered in the time card

© 2014 ServiceNow All Rights Reserved

Time Card Setup



© 2014 ServiceNow All Rights Reserved

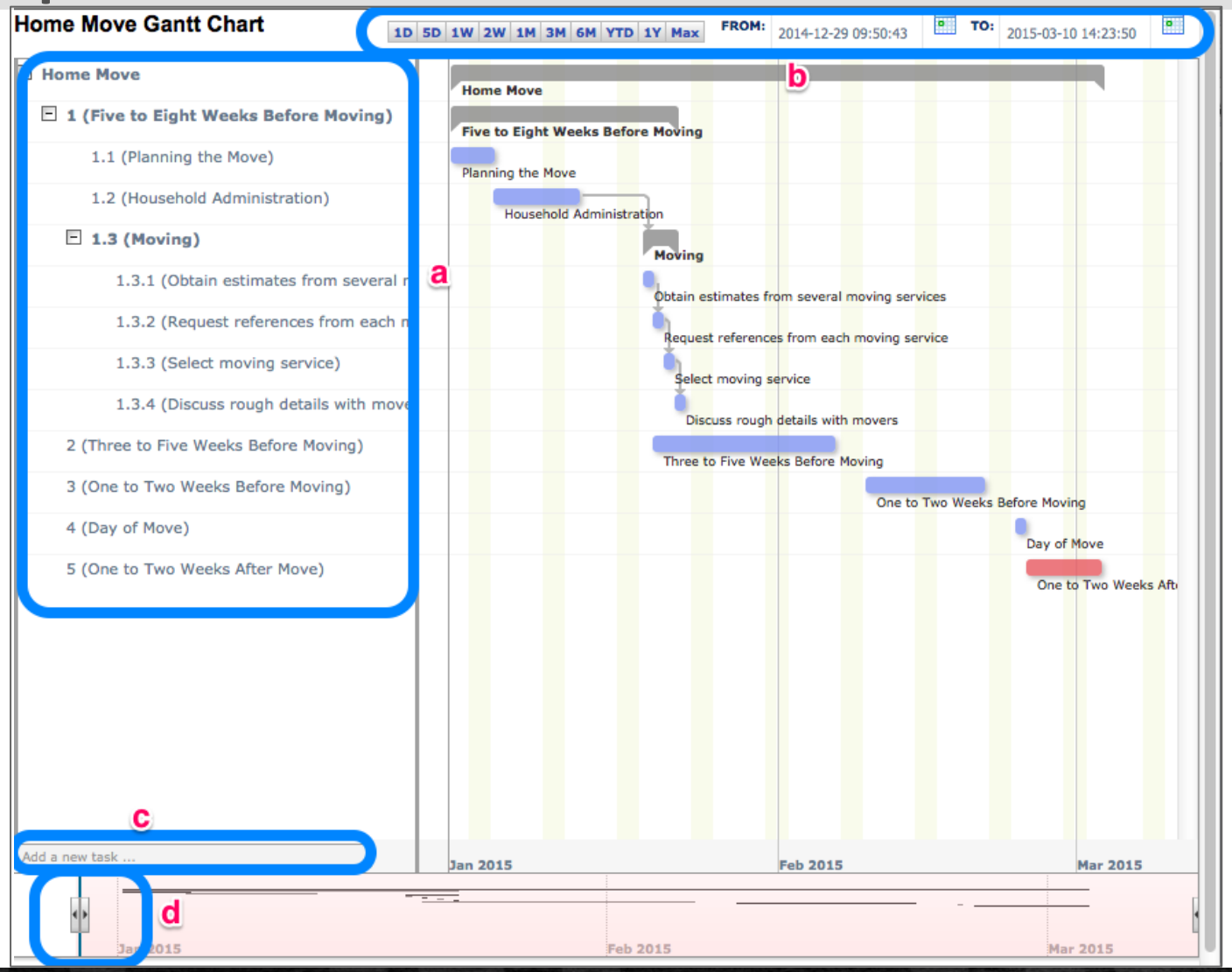
Gantt Chart

Lab 6

- Available on the Gantt chart:
  - **Task Hierarchy**
  - **Time Span**
  - **Add a new task field**
  - **Project Slider**
  - **Time Periods not part of Schedule**
  - **Differentiation between project tasks**

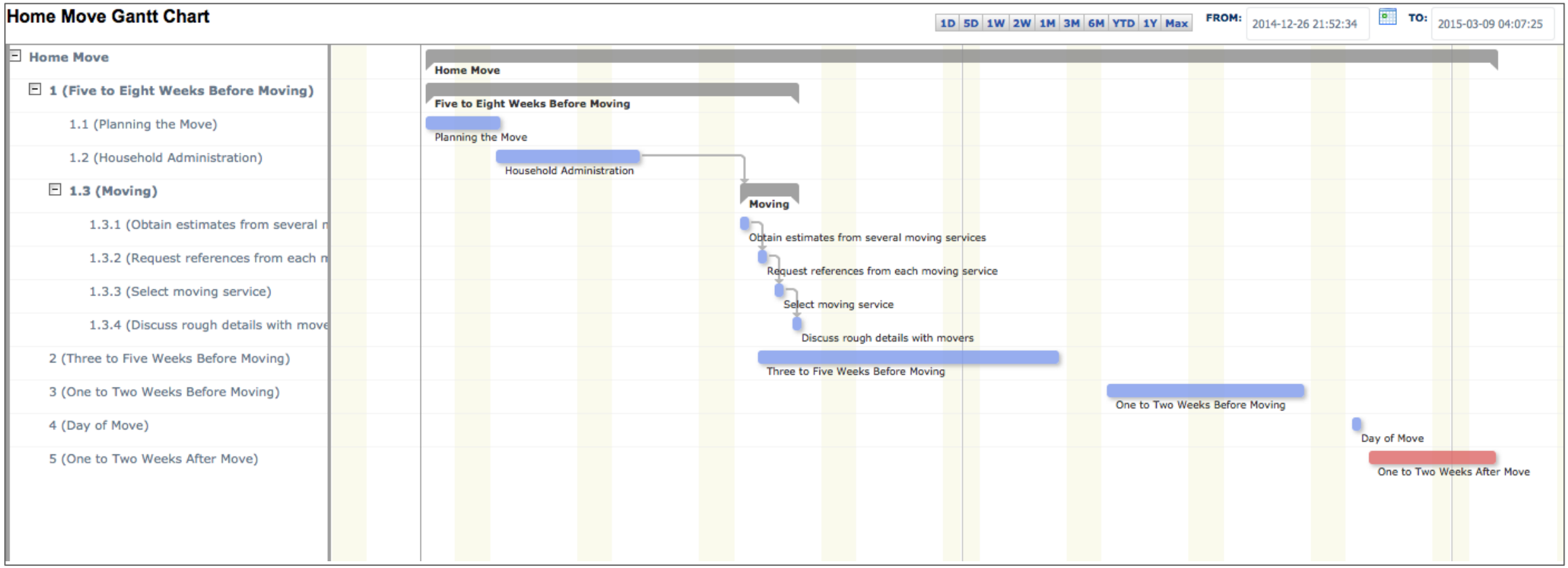
© 2014 ServiceNow All Rights Reserved

Gantt chart properties



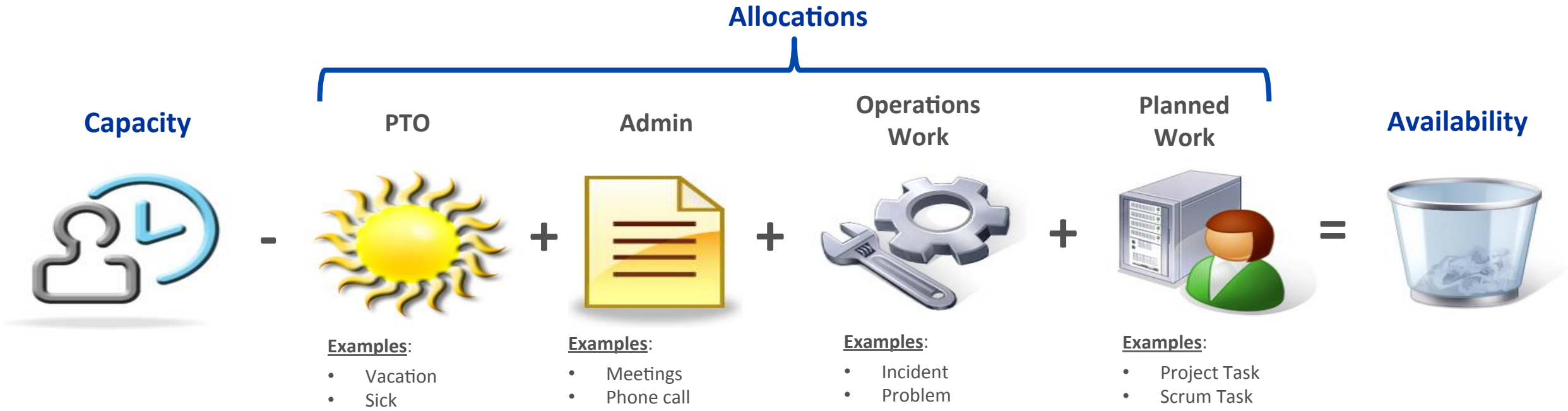
© 2014 ServiceNow All Rights Reserved

Task Dependencies



© 2014 ServiceNow All Rights Reserved

Resource Management – Lab 7



Problem	Solution
IT is struggling to gain accurate, real-time visibility into the capacity and utilization of resources required to deliver IT services.	a lightweight, flexible tool for delegating resources to tasks across the ServiceNow platform and providing resource availability, resource allocation, and time card tracking capabilities.

© 2014 ServiceNow All Rights Reserved

Questions?

© 2014 ServiceNow All Rights Reserved

Executing & Monitoring and Control

Lab 8, 9, 10 & 11

© 2014 ServiceNow All Rights Reserved

Baseline

Lab 8

- A baseline is a collection of all planned dates for all tasks and milestones at the time you create the baseline
  - Displays if any project phases or tasks are slipping at the time you create the baseline.
  - Can be created multiple times through out the project's lifecycle

© 2014 ServiceNow All Rights Reserved

Starting a project

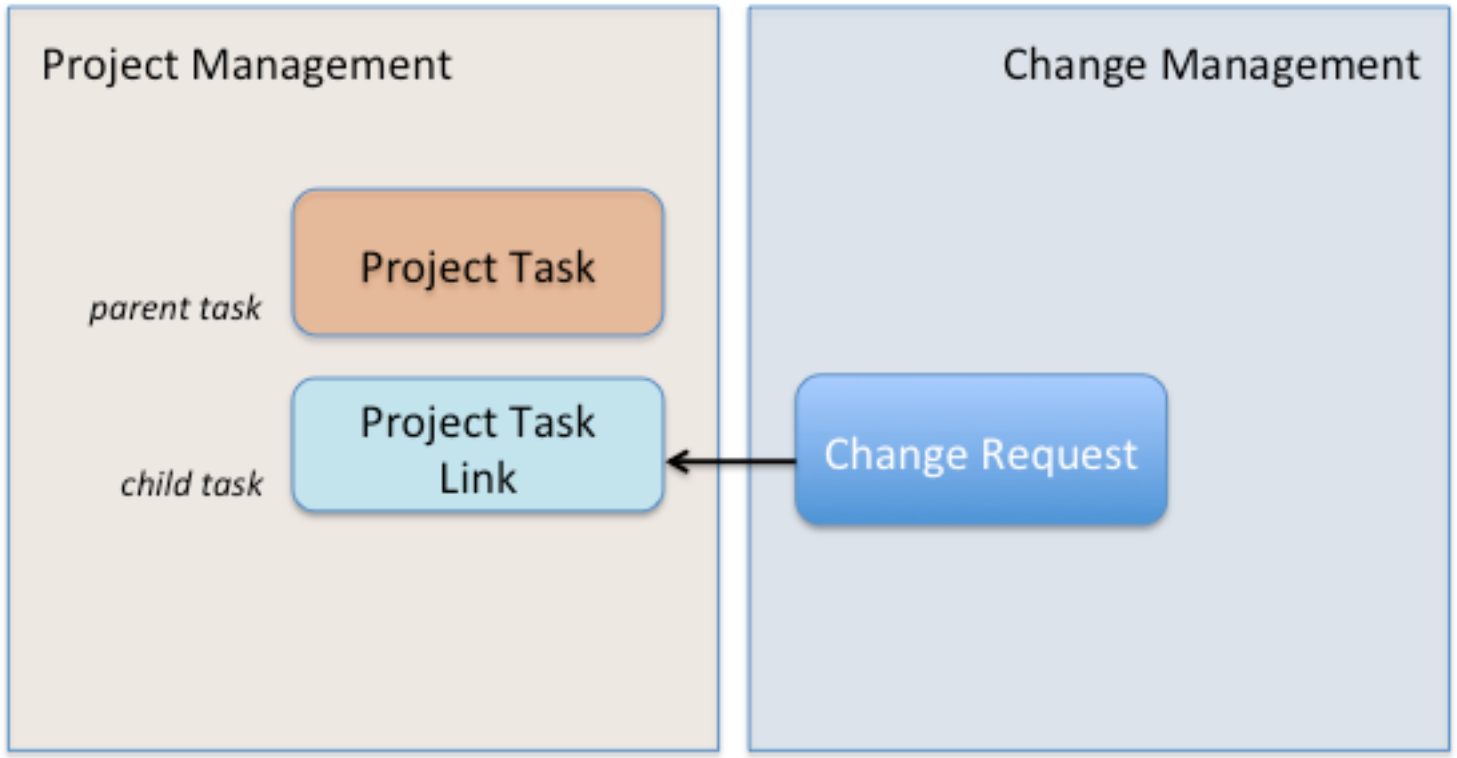
Lab 9

- Starting a project, two options available:
  - Click the **Start a Project** button
  - Change the **State** field on the Project or Project Task to **Work in Progress**
- Once started
  - **State** field on the Project form changes to **Work in Progress**
  - **Actual start date** of the project changes to the current date

© 2014 ServiceNow All Rights Reserved

Linking a Change

Lab 10



© 2014 ServiceNow All Rights Reserved

Managing a Project

Lab 11

- Managing a Project
  - Make changes to several items
    - Costs
    - Priority
    - Schedule
    - Planned values that are not rollups
    - Risks and issues
    - Create baselines after changes have been made

© 2014 ServiceNow All Rights Reserved

Questions?

© 2014 ServiceNow All Rights Reserved

Closing

Lab 12

© 2014 ServiceNow All Rights Reserved

Closing

Lab 12

- Things to do before closing a change
  - Evaluate project charter, were objectives met
  - Calculate project's cost and benefits
  - Analyze baselines and actual
  - Document Lessons Learned

© 2014 ServiceNow All Rights Reserved

Reporting

- Lists
- Gantt Charts
  - Project
  - Portfolio
- Overview Dashboards
  - Project Overview
- Gauges

© 2014 ServiceNow All Rights Reserved

Questions?

© 2014 ServiceNow All Rights Reserved

Top Takeaways

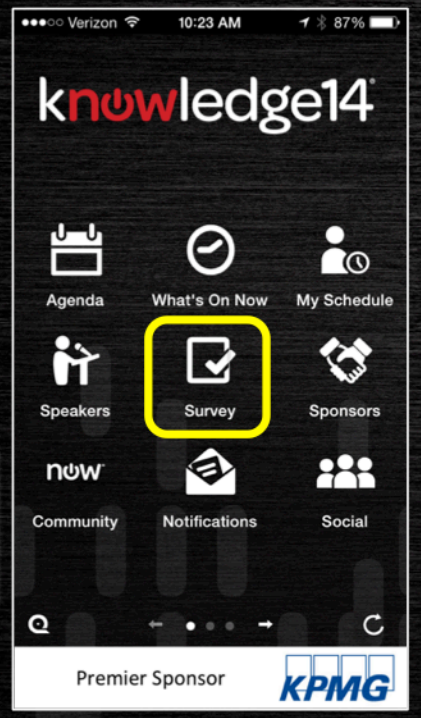
1. ServiceNow Project Management helps you plan, track and manage projects of all sizes, (small to large projects) along with their project task

2. The Project Management application has a Gantt chart that is easy to read and has the capability to display the project tasks in a work breakdown structure list.

3. Project Management integrates with other ServiceNow applications seamlessly – change management, resource management, service catalog and as well as reports.

© 2014 ServiceNow All Rights Reserved

Tell us what you think!



Click on the survey link in your Knowledge14 mobile app. Help us make Knowledge 15 even more valuable!

Thank You

Emily McMullin

Sr. Solutions Consultant

ServiceNow

Emily.mcmullin@servicenow.com

Molly Feterl

Sr. Technical Consultant

ServiceNow

Molly.feterl@servicenow.com

Want a copy of this deck?

Sign into the BuzzHub to unlock all the slides and lab guides from Knowledge14 sessions

