knowledge17

May 7–11, 2017 • Orange County Convention Center • Orlando, FL

Lab Guide

ITBM 101:

What's New in Istanbul for ITBM

Carolina Hallonsten & Natalie Quinones

Default Login / Password: Knowledge17

admin / Knowledge17

itil / Knowledge17

employee / Knowledge17

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Lab Goal

Lab 1.1 Project Budgeting and Forecasting

This lab familiarizes you with the Project Budgeting and Forecasting capabilities that was introduced in Istanbul. It covers the following:

- Revise portfolio target
- Select demands and projects for planning period
- Create portfolio budget
- Create portfolio forecast

Login Information

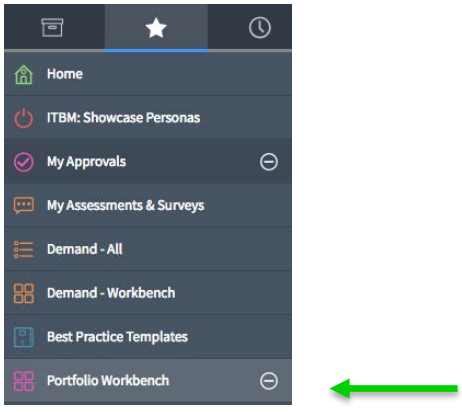
Follow these steps to log into the lab environment.

1. Navigate to the unique instance **URL** provided to you.
2. Log on as user **ADMIN** and use the password **Knowledge17**.
3. Impersonate **Megan Burke** (Portfolio Manager).

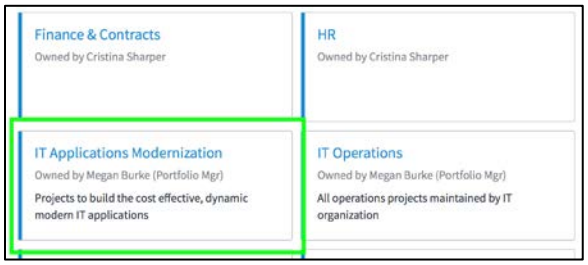
Revise Portfolio Target

The basis for being able to manage budgeting and forecasting on portfolio level is to know the boundaries you need to adhere to. In this lab, you pretend that you are back in 2016, doing the planning for the fiscal year 2017.

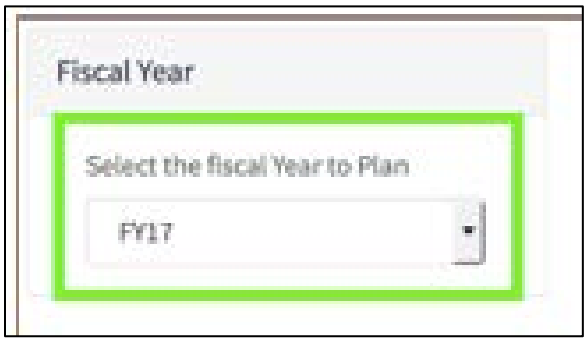
1. In the **Favorites** menu navigate to **Portfolio Workbench.**



2. Choose portfolio **IT Application Modernization.**



3. Select **FY17** as planning period.



4. Revise target.



These are the initial numbers you manage against as you plan for incoming Demands for next year. These numbers are often provided to the portfolio manager from the management or financial team.

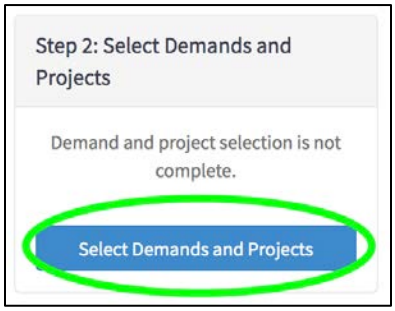
5. No changes are needed to the numbers, so click **Save** to close the popup.

Note: ServiceNow Portfolio Management supports both simple and advanced financial planning. The above example is advanced. This is a setting on the portfolio that can be changed in the portfolio form.

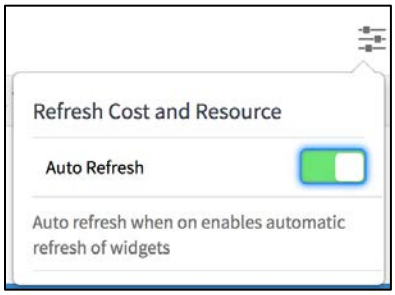
Select Demands and Projects for Planning Period

For the planning period, there is a pipeline of incoming demand and projects that are already started and running. These must be considered when planning what to allocate budget to for the coming planning period.

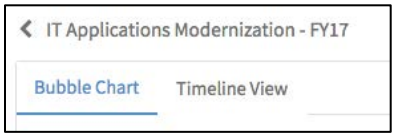
1. Click **Select Demands and Projects**.



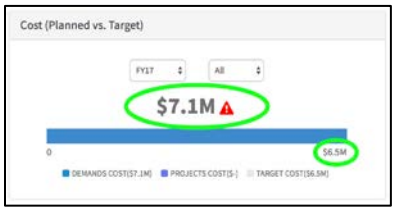
2. Make sure the auto-refresh setting is enabled.



3. The bubble chart contains the demands that are in the pipeline for this portfolio. Choose the demand **ServiceNow apps Brazil roll out**, right-click, and choose **Select for execution**.

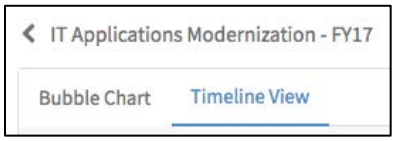


4. Notice that the cost widget to the right changes when demands are selected and deselected. The red triangle is a notification that the target for the portfolio for this planning period has been exceeded.



5. Check the Resource Overview and click the **%Utilization** tab. Notice that the overall resource situation is good, but down on team level you see that that estimated utilization exceeds 100% for some teams if this demand is included.

6. Click the **Timeline** tab. There are also ongoing projects in execution that impact the total cost, which negatively affects the target for the planning period.



7. Deselect the checkbox for demand **ServiceNow apps Brazil roll out** again to make sure you do not exceed the target number.

8. Click the demand name of **ServiceNow apps Brazil roll out** to open it in a new window.

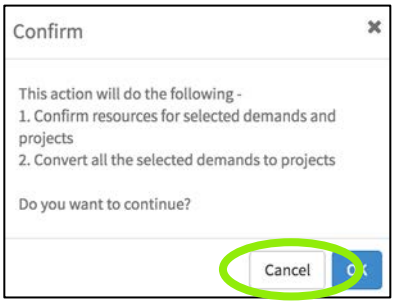
9. Scroll to and choose the tab **Cost Plans**. This is where the figures come from that are used in the aggregated view in the portfolio planning view.

   Note: Resource Plans that are created for a project or demand automatically feeds the cost plan.

10. Return to the tab with the portfolio **workbench**. Click **Confirm**. This confirms all resource plans for the selected demands and projects, and it converts all selected demands to projects.



11. Click **Cancel** on the popup window.



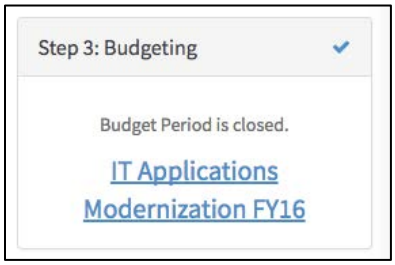
Note: There are other ways to confirm: per each investment instead of all at once, if that matches the process you are working; or by using a setting in project preferences where you can decide if the confirm action should include the automatic creation of projects or not.

Create Portfolio Budget

To make this easier to walk through, go back in time.

1. Select **FY 16** as in the drop-down list for the Fiscal Year.

2. Note that it is stated that the Budget Period is closed and that a budget is already created. Click the budget created and have a look at the information stored.



Note: There can be an approval workflow process with a steering committee approving the budget plan for the portfolio. The budget plan can be updated and re-promoted during the open timeframe for the budget period, which will create a new version of the budget plan. Opening and closing budget and forecasting periods is done from the financial side of the solution.

Create Portfolio Forecast

When the execution of the portfolio has begun, the budget is no longer editable. This is when you use the forecasting capabilities. A forecast plan is based on future changes to the project financial figures included in the portfolio. This gives the portfolio manager the opportunity to re-plan based on

historical data. The story going forward is that actuals reported against a project will exceed the planned figures. The next steps explain how to make those changes, then create a forecast plan based on the changes.

1. Below the budget, find **Forecasting**. Notice that the forecast period open is **FY16: June**. Before you create the new forecast, you make some changes that can be incorporated in the the coming forecast plan.

2. First look at the current situation. Click the **Select Demands and Projects** number link and choose the **timeline view** tab. Locate the **General Project Ledger Upgrade** project and note the planned estimate number for this project.

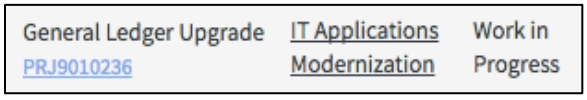


   Now Megan understands the current situation. Next, look at the possibilities of adopting to the changes from the Project Manager's perspective. As the project executes, changes impact the financials and thereby also the aggregated portfolio situation.

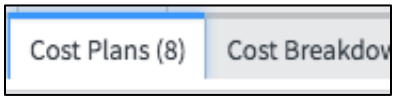
1. Impersonate **Paul Martin** (Project Manager).

2. Imagine that he received an invoice for Hardware purchased for the project and it turns out to be more expensive than he estimated. First, he needs to submit the actuals.

3. In the Favorites menu, choose **My Projects** and choose the project **General Ledger Upgrade** in the list.



4. Scroll to the related list tabs and open the tab **Cost Plans**.

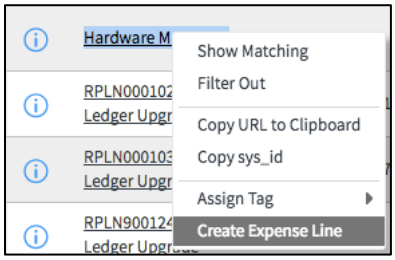


5. Open the cost plan **Hardware May-June** and scroll to the **Cost Plan Breakdowns**.

6. Double-click to try to edit the amount in the cost column on the line item for FY16:May; notice that you are not allowed to make changes. This is because the Forecast period is not open for May. If you try the same for FY16:Jun, you notice that you are allowed to make changes to that one because the forecasting period for FY16:Jun is open.

7. Return to the project using the **back** button in the top header.

8. Go to the **Cost Plan** tab and right-click the cost plan **Hardware May-June** and choose **Create Expense Line**. This creates actuals related to this cost plan. Now Paul is adding the actual hardware cost as of the invoice received.



9. Add the following data:

   Date: **2016-05-12 (important that this is right and in 2016)**
   Amount: **4000 USD**
   State: **Processed**

10. Click **Submit**.

11. Return to the cost plan and choose **Hardware May-June** and notice that the actuals are registered on the project.

12. The increased cost for May is also be the same in June so the Project Manager now needs to update his cost plan for the coming month. Click to edit the cost for June in the **Cost** column and update to **4000 USD**.

13. Note that this change is only possible for the month with an open forecasting period.

    Now the project manager has made his changes. Look at this from the aggregated portfolio perspective as the **Portfolio Manage**r again.

14. Impersonate **Megan Burke (Portfolio Manager)**.

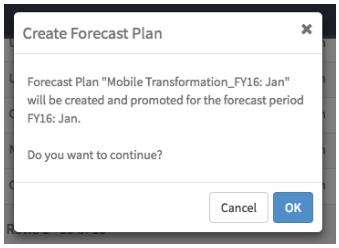
15. Click the Select **Demands and Projects** number link and choose the timeline view tab. Localize the **General Project Ledger Upgrade** project and note the **Planned** estimate number for this project has increased since the last time you checked.

16. Return the **Portfolio Workbench**.

17. Scroll to and click the button **Create Forecast Plan**. This will capture all changes to the planned costs on all underlying projects. It will also capture the variances in planned cost if a project has been added to the portfolio or removed.



18. Click **OK** in the popup window.



19. Click the new **Forecast Plan** to open it. Review the information and click **Save**. No changes are needed.

20. While the Forecast period is open, you can re-promote the plan and include more or other changes. To re-promote, click **Re-promote**. (But that is not needed now.)

    Note: An overview of the details of the budgeted, actual and forecasted financials in time periods can be visualized in the Budget Console, which is part of the FM side of the solution.

    Budget and Forecast periods need to be opened to change the financials on the project for that period and to be able to create a new forecast plan for the portfolio.

    You can extend and set up approval workflows for the budget and forecast plans.

    The new Portfolio Workbench is built using the new Service Portal capabilities in ServiceNow. This means this workbench can now be adjusted in a much better way than the Portfolio Workbench earlier.

Lab Goal

Lab 2.1 Resource Management

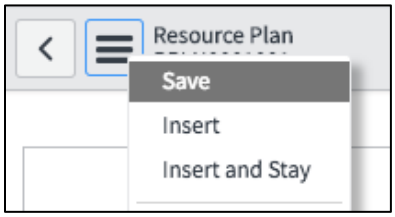
This section of the lab covers the news for Resource Management. It includes the following tasks:

- Create a Resource Plan for a project.
- Handle a requested Resource Plan as a Resource Manager.
- Review the situation and workload for a team.

Create a Resource Plan for a project

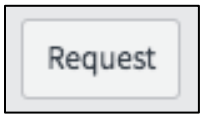
1. Impersonate **Paul Martin (Project Manager).**
2. Navigate to **My Projects>Project General Ledger Upgrade.**
3. Scroll to and open the **Resource Plan** tab.
4. To create a new Resource Plan, click **New**.
5. Enter the following data:

   Group Resource: **Analyst**
   Role: **Business Analyst**
   Planned hours: **200**
6. Right-click in the grey header at the top and click **Save**.



7. Scroll down and note that Requested Allocations have been created per month as the default for **Allocations**. This can be changed to be Weekly or Plan Duration as desired. The Requested Allocation line items can now be adjusted before the Resource plan is requested and sent to the Resource Manager.

8. Click **Request** at the top.



Note: In Istanbul, the Hard Allocation Spread was extended and can be either **Even** or **Front Loaded.** The option **Even** creates an even spread of the hours requested. The option **Front Loaded** pushes the hours to the beginning of the period requested as much as possible.

The addition of the **Any member** option in the **Members preference** field was introduced in Istanbul. Here the difference is described in more detail:

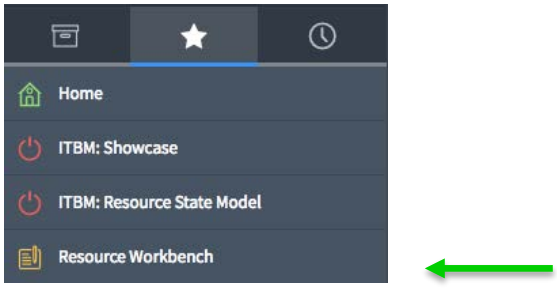
- All members
  - Requested hours proportionately split among all/matching users of the group based on number of working days
- Specific members
  - Requested hours proportionately split among specified users of the group based on number of working days
- Any member (new)
  - Most available user is soft allocated first. Remaining hours split evenly among all users when requested hours is more than the available hours of the group

Handle a Requested Resource Plan as a Resource Manager

Now look at what happens with the requested resource plan from the receiving side. This is managed by the Resource Manager, who can also be a Team Manager or Resource Owner. The Resource Manager can get a notification that a he/she has received a new resource plan to handle. In this case, log in as a **Resource Manager** and locate the **Resource Plan**.

1. Impersonate **Rosie Mathews (Resource Manager)**. She is the team manager for the Analyst group.

2. In Favorites, choose **Resource Workbench.** Here are the Resource Plans that need action:

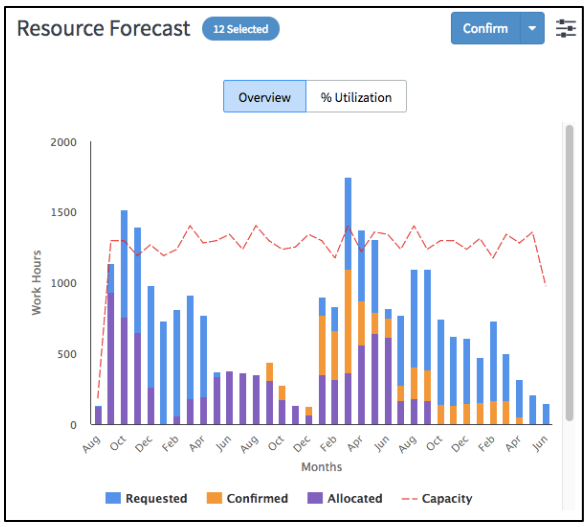


3. Click the filter icon to add to the filter as below and click **OK**.





4. Click the **Select All** checkbox. This provides a capacity view of the situation for the team, taking the incoming demand into consideration.



The colors in the forecast represents the following:

Blue = Hours from resource plans in state **Requested**. This means the hours have been submitted and requested, but not yet acted on by the receiving Resource Manager or Resource Owner.
Orange = Hours from resource plans in state **Confirmed**. This means the Resource Manager has confirmed that his/her team can deliver the hours requested, and when the resource plan is confirmed the resources are soft-booked.
Purple = Hours from the resource plans in state **Allocated**. These hours and resource plans have been approved by the Resource Manager and the resources are hard-booked for the work.

5. Deselect one or more of the resource plans by clicking it in the list to the left. Note how the bars change.

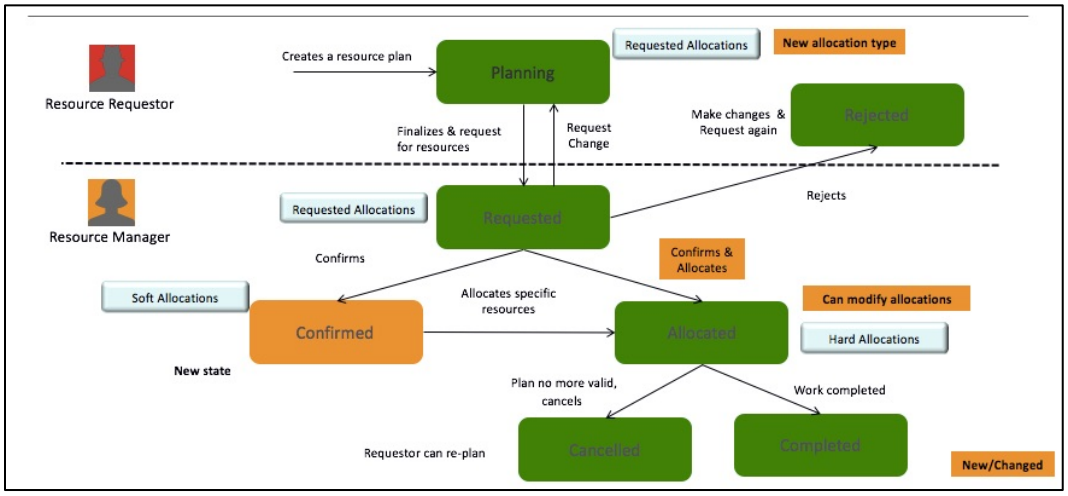
6. Choose the **Utilization** tab to view the estimated utilization for the team during the period.

7. Deselect the **Select All** checkbox and click to choose Resource plan you created earlier.

8. Click the **Confirm** button to confirm the Resource Request.



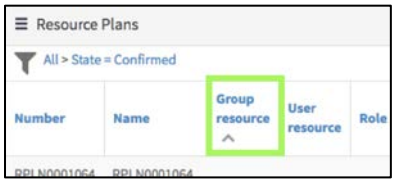
Note: Confirm is a new step in the Resource Plan request process introduced in Istanbul. This provides the opportunity to create soft allocations, and sends the requester a confirmation that the resources he/she asked for are available for the time requested (but it still is possible to adjust).



9. In the menu at the top, choose **Allocate Resources**.



10. Locate and click the resource plan you just confirmed.
Tip: sort on the Group Resource column to get the Resource Plans for the Analyst group on top.

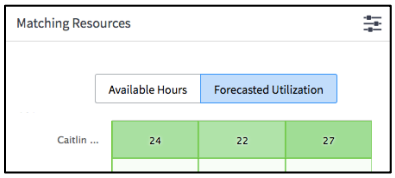


11. This opens a view showing the situation for this resource plan and the group chosen. On the **Allocate** button, click the dropdown arrow and choose **Edit Resource Plan**. This way, the Resource Manager can edit the original resource plan to match the resources and capacity that can be allocated. You do not have to make any changes.



12. Click outside the popup window somewhere on the ServiceNow window behind to return the overview view.

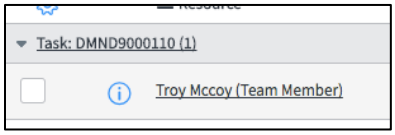
13. To the left, in the Matching Resources area, click the tab **Forecasted Utilization**.



14. To drill down to the underlying data, click the heat map on a specific member.



15. Expand one of the task lines. Click the name of the resource in the record to get details on the resource.



16. On the resource form, scroll to the related links and click **View Calendar**.



17. Close the web browser tab in which the calendar opened and click outside the popup window somewhere on the ServiceNow window behind to return the overview view.

18. Click **Allocate** to approve the Resource Plan and allocate the resource to the project. Now the project manager can start assigning the resources to tasks.

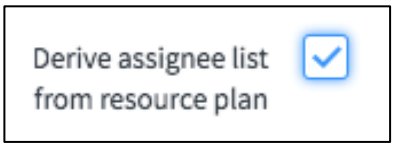
    Note: Confirm and Allocate can be done in the same step if you want to make the process easier and quicker.

The new resource workbench is built using the new Service Portal capabilities in ServiceNow. This means this workbench can now be adjusted in a much better way than the Resource Workbench available earlier.

Preference setting to have the resource manager specify what events should be excluded in the capacity calculations and not allow allocations created for the times when those events exists in the calendar.

Project Settings – Assign only resources allocated to the project from the planning console.

A new attribute has been added on project header, if this property is set to **true**, the **Assigned to** field and **Additional Assignee List** will be derived from the resource allocated to the project. The list of resources will be derived from all **Allocated** state resource plans associated to the project or any task of the project.



Lab Goal

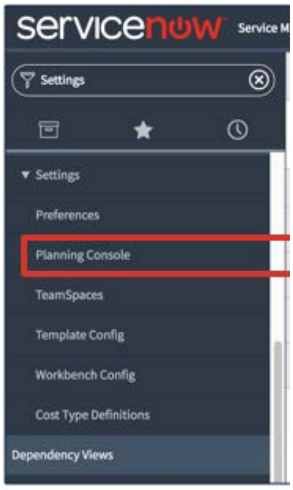
Lab 3.1 Planning Console

This lab will explore the new capabilities of extending the Planning Console. It includes the following task:

- Extend the Planning Console with more columns

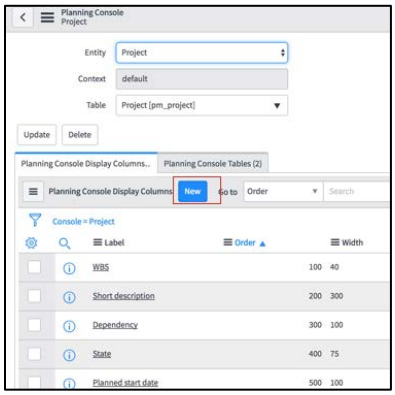
Extend the Planning Console with More Columns

1. Impersonate **System Administrator**.
2. Navigate to **Project>Settings>Planning Console.**



3. Click the **Project** entity.

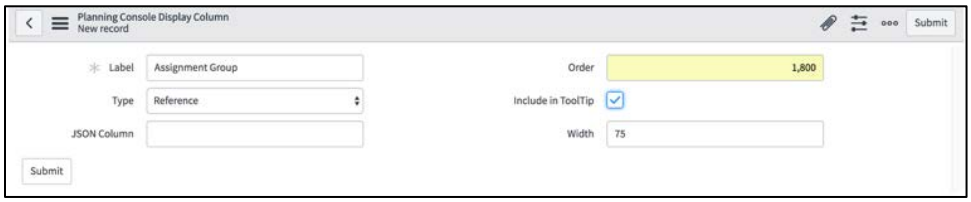
4. In the **Planning Console Display Column** tab, click **New.**



5. Enter the following data:

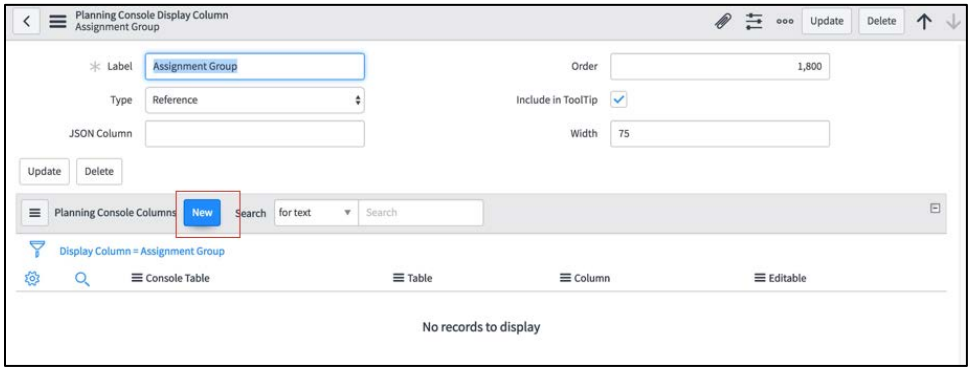
   Label: **Assignment Group**
   Type: **Reference**
   Order: **1,800**
   Include on Tooltip: **Checked**
   Width: **75**

6. Confirm your screen looks like the example.



7. Right-click in the gray header and click **Save**.

8. The page reloads with a new list at the bottom. Scroll to the **Planning Console Columns** tab, and click **New.**

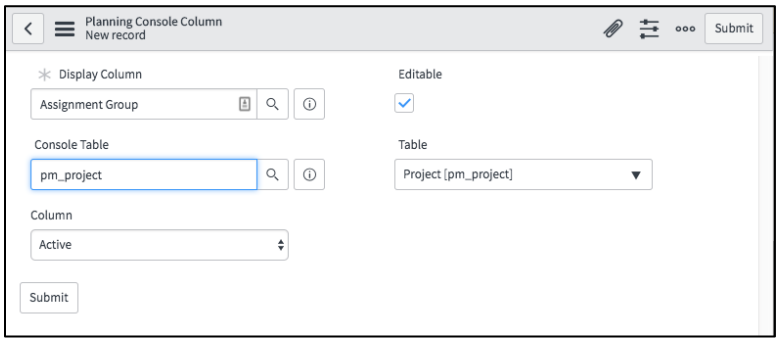


9. Enter the following data:

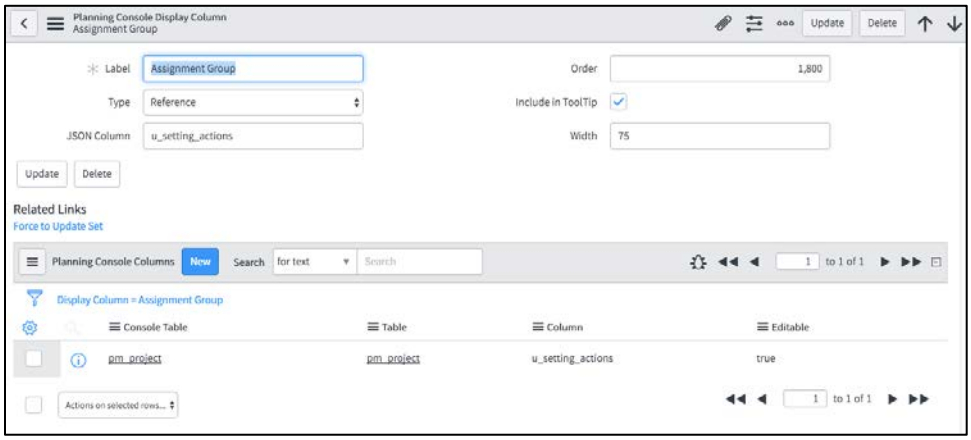
   Display Column: **Assignment Group** (should default to this)
   Console Table: Click magnified glass, and select **pm_project**

10. The other fields should automatically populate. Check the **Editable** box.

11. Confirm your screen looks like the example.

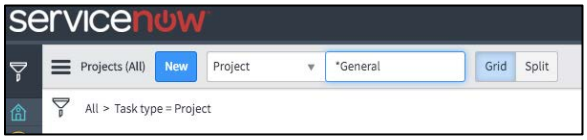


12. Click **Submit**. The screen should reload and look like the example.

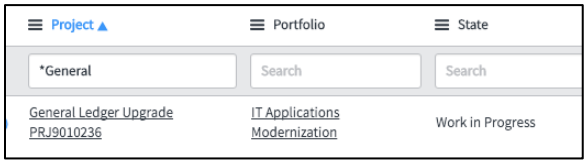


13. Navigate to **Projects>All** in the navigation bar.

14. In the search field, select **Project**, and type ***general** and hit **enter** (This searches for any Project that contains the word "general").

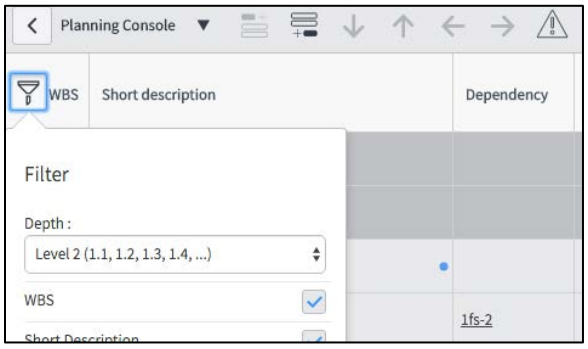


15. Select the **General Ledger Upgrade** project.

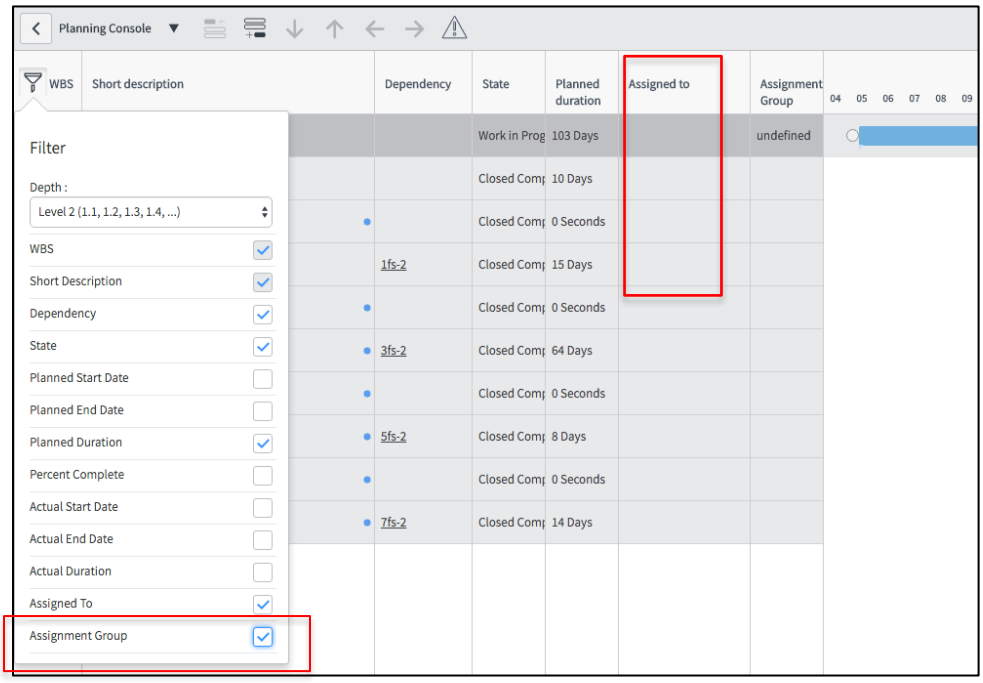


16. Scroll to and click **Planning Console** in the related links section.

17. Once the planning console loads in a new screen/tab, click the **filter** in the left corner.



18. Check the **Assignment Group** box in the list. Notice the Assignment Group column added to the console.



19. As you double-click into the **Assignment Group** field on one of the phase or task lines (not the top one as that is the project itself), the reference field appears to give you options.

Lab Goal

Lab 4.1
Time Sheets

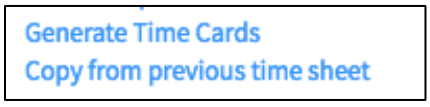
This section of the lab explores the new functionality for Time Sheets. It includes the following tasks:

- Register time worked and submit time sheet
- Review time sheets
- Time Reporting settings

Register Time Worked and Submit Time Sheet

1. Impersonate **Troy McCoy (Team Member)**
2. In the Favorites menu, navigate to **Time Sheet – Current (This Week).**
3. Add hours on some of the days and some of the tasks.
4. Click the button **Submit Time Sheet**.

   Note: The time sheet is auto-populated with the ongoing tasks that Troy McCoy is assigned to this week. The auto-population can be done manually using the related link on the time sheet, or a job can be used to populate the Time Sheets weekly with tasks that are open and assigned to each specific resource. There is also an option to copy time sheets from the previous week, which makes sense if you work full-time on the same project week after week.

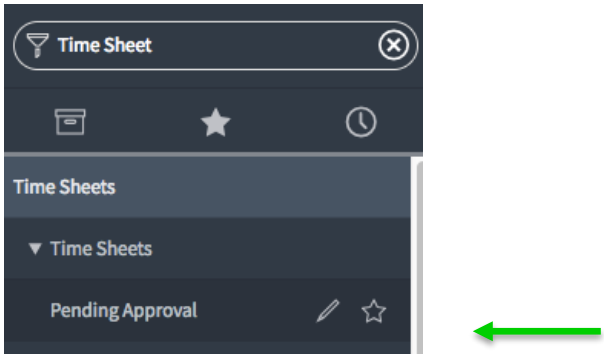


Review Time Sheets

When Troy submits his Time Sheet, it is reviewed and approved by his Resource Manager, Rosie.

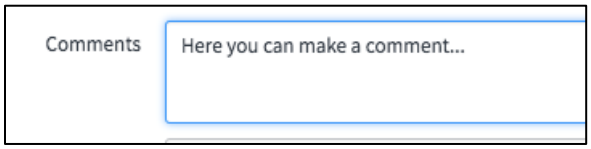
1. Impersonate **Rosie Mathews (Resource Manager).**

2. Navigate to **Time Sheets > Pending Approval**.



3. Click the time sheet (on the date) just submitted by Troy McCoy.

4. Add a comment in the **Comments** field.



5. Right-click in the gray header and click **Save**.

6. Click **Approve** at the top.

Note: Time Sheets in ServiceNow can include tasks, incidents, and other objects that you would want to register time against. As the Time Sheets includes individual Time Cards, this provides the possibility of approving each time card (line item) separately and the approvals can be routed to different people. That means that a project task time card can be approved by the project manager for that project, an incident time card can be approved by the service desk manager, and the entire time sheet can finally (in a second step) be approved by the manager of the resource submitting the time sheet.

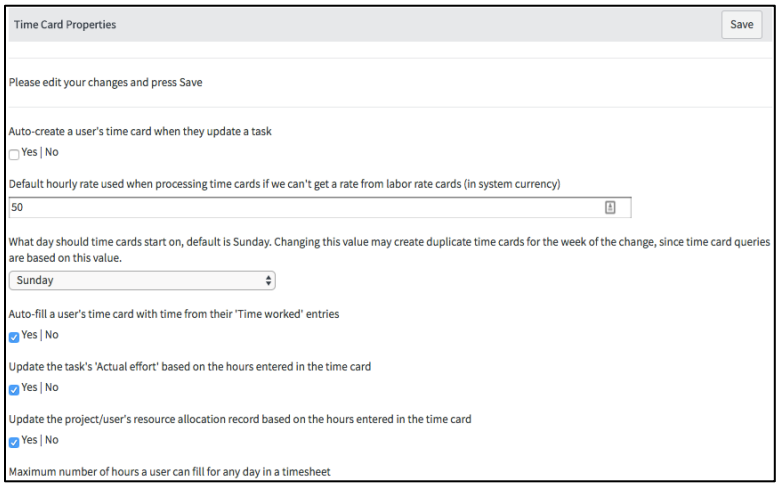
The time registration and approval of timesheets are capabilities available in the ServiceNow app, so you can do these activities using your mobile phone or tablet.

Time Reporting Settings

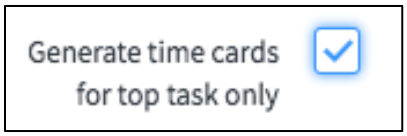
You can edit time reporting settings so time sheets reflect the processes and rules in your organization. These settings are newly introduced in the Istanbul version.

1. Navigate to **Time Sheets>Administration>Properties**.

   Here you'll find settings for things like controlling the number of hours per day and week to allow for submission in a time sheet, and if the actual effort on a project should be updated or not, based on the time submitted in a time sheet.



   Note: Another option you can set for each project is if you want time cards to be created for the top task of the project only, or for the underlying tasks also. This setting can be managed by the project manager and is set upon the project object.



   There are also follow-up reports that, for example, list time sheets missing for the past week. This can be combined with notifications.

Lab Goal

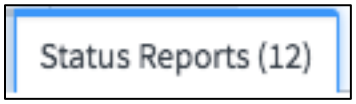
Lab 5.1 Project Status Reporting

This section of the lab explores Project Status Reporting. In Helsinki, we introduced status reporting on projects, and now in Istanbul we have complemented that with new Project Status Reports which have Service Portal-based reporting. This provides the ability of adaption of the reports. This section includes the following tasks:

- Create a status report on a project
- Review Project Status Portal
- Review Portfolio Project Status overview

Create a Status Report on a Project

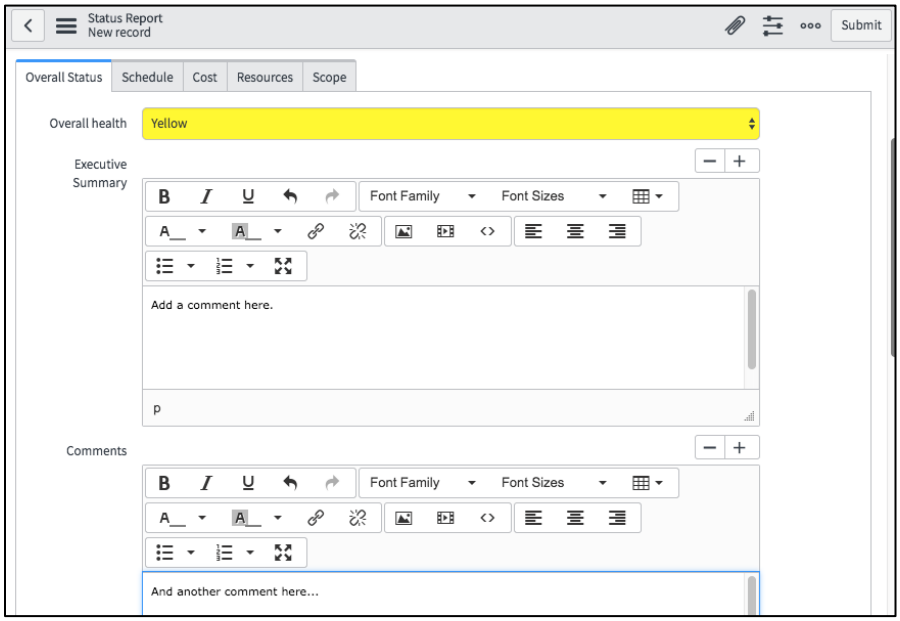
1. Impersonate **Paul Martin (Project Manager)**.
2. Navigate to **My Projects** and choose project **General Ledger Upgrade.**
3. Scroll to the tabs and choose **Status Reports**.



4. Click **New**.

5. Add the following data:

   Overall Status tab:
   Overall health: **Yellow**
   Executive Summary: **Add a brief note as you like.**
   Comments: **Add a brief note as you like.**



6. Add the overall indicator (the color) on the other tabs **Schedule**, **Cost**, **Resources** and **Scope**.

7. Click **Submit**.

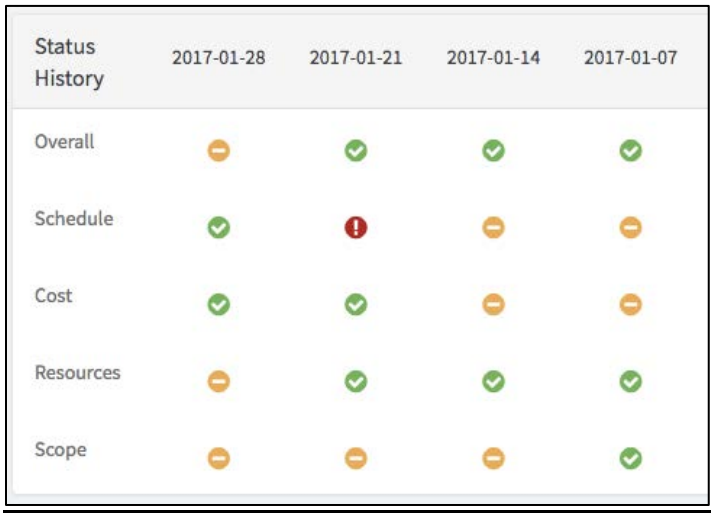
Review Project Status Portal

Look at the compiled Status reporting for the General Ledger Upgrade project.

1. Since you have the General Ledger Upgrade project form open, scroll to the related links and click **Status Report**.

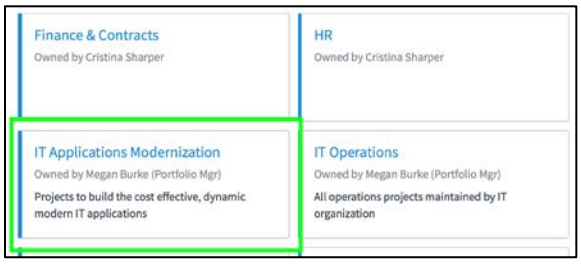


2. This opens a portal-based view with a summary of project information. In the Current Status section, you see the status report you just submitted on the project. The Status History below shows the history and the changes over time for the status reports submitted earlier.

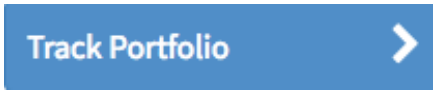


Review Portfolio Project Status Overview

1. Impersonate **Megan Burke (Portfolio Manager).**
2. In the Favorites menu, navigate to **Portfolio Workbench.**
3. Choose portfolio **IT Application Modernization.**



4. Select **FY16** as planning period.
5. Click **Track Portfolio**.



6. The Timeline View shows all ongoing projects, with the cost and resource overview of those projects to the right. Click the **Project KPI** tab to visualize the Portfolio Project Status overview.

7. Click the project **General Ledger Upgrade**, and the Project Status Portal for that project opens. This way, the portfolio managers can drill down to see underlying data for each of the projects in their portfolio.

