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http://clabs.link/lab132025

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WORK at LIGHTSPEED

ITBM 101: What's New in Istanbul for ITBM

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ServiceNow

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Speaker Introduction



Name: Carolina Hallonsten

Title: Business Management Solution Consultant

Function: ITBM EMEA Solution Practice

Company: ServiceNow

Experience: 1 year as Solution Consultant @ ServiceNow, 4 years in presales at CA Technologies

Expertise: IT Business Management

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Speaker Introduction



Name: Natalie Quinones

Title: Solution Consultant

Function: Commercial Sales, NY Metro

Company: ServiceNow

Experience: 1 year as Solution Consultant @ ServiceNow, 5 years Technology Consultant @ Deloitte

Expertise: Full ServiceNow spread (generalist)

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Objectives and What You Will Learn

Objectives

- Understand how your organization can benefit from the new ITBM features in ServiceNow

What you will learn

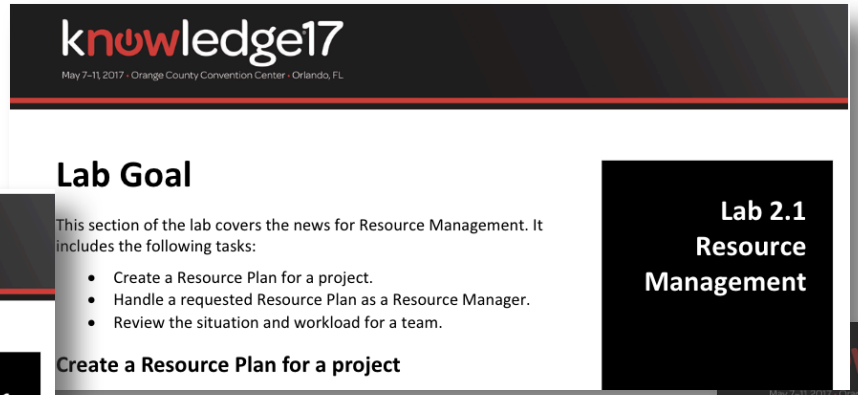
- Project Budgeting and Forecasting
- Resource Management
- Project Planning Console
- Time Sheets
- Project Status Reporting

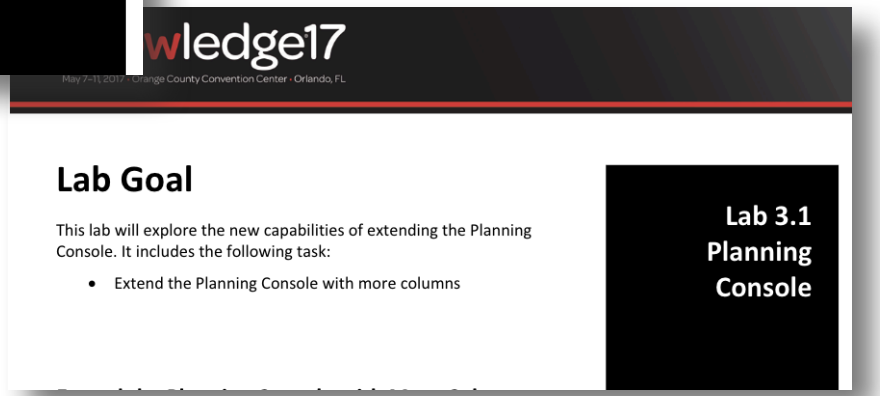
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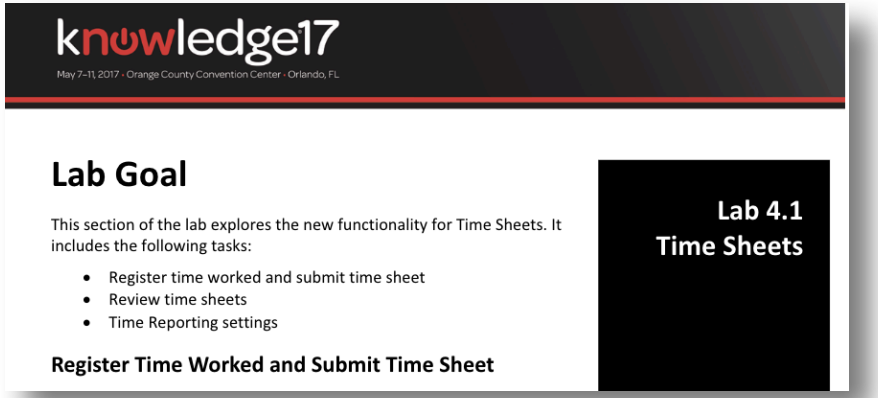
Let's get started!

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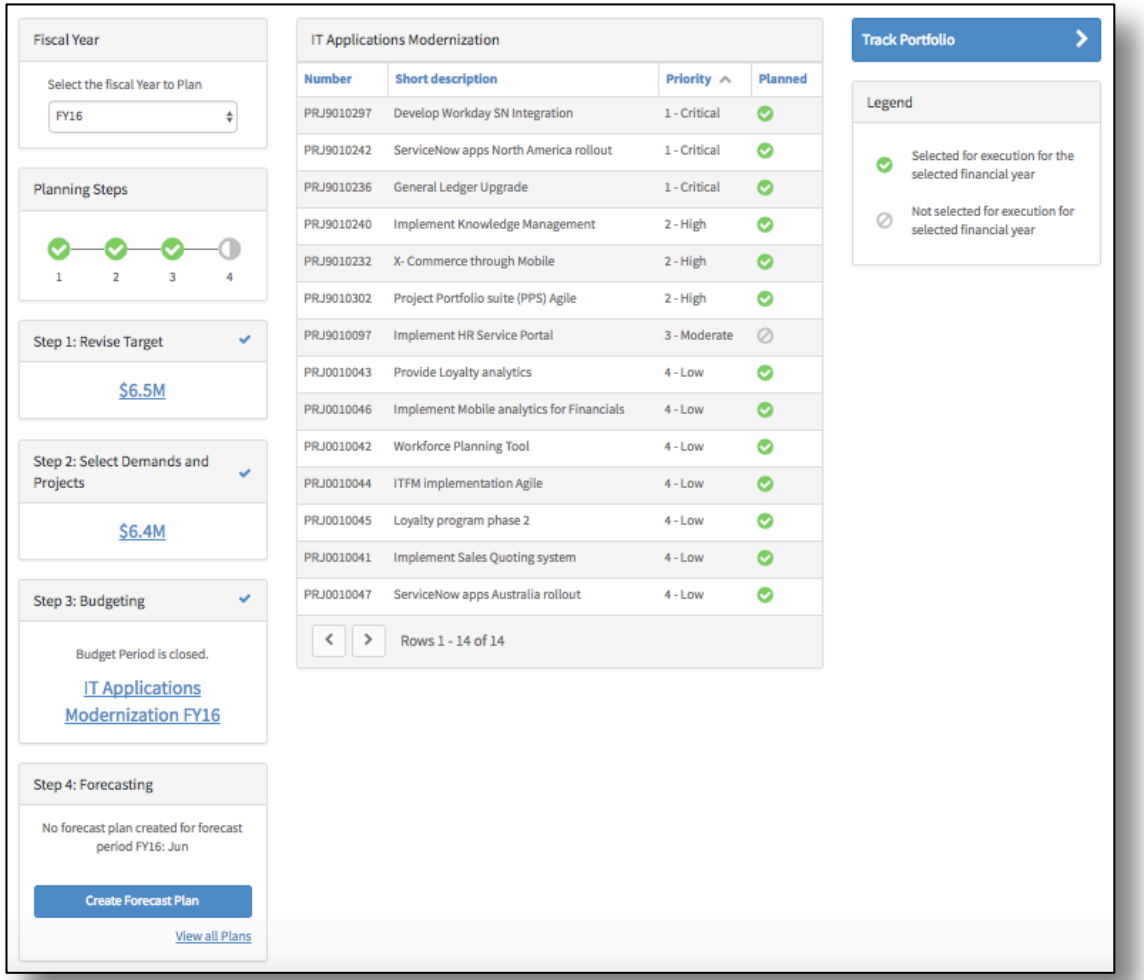
Note!

- Please do **Save** in case that step is left out
- Demo data and time line

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Project Budgeting & Forecasting



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Note!

- Budget and Forecast periods
- Will not have you create a budget plan only a forecast plan
- Add actuals to past financial periods
- Colors of the different investment types can be adjusted in the Portfolio Workbench

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Lab Goal

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

Lab 1.1 Project Budgeting and Forecasting

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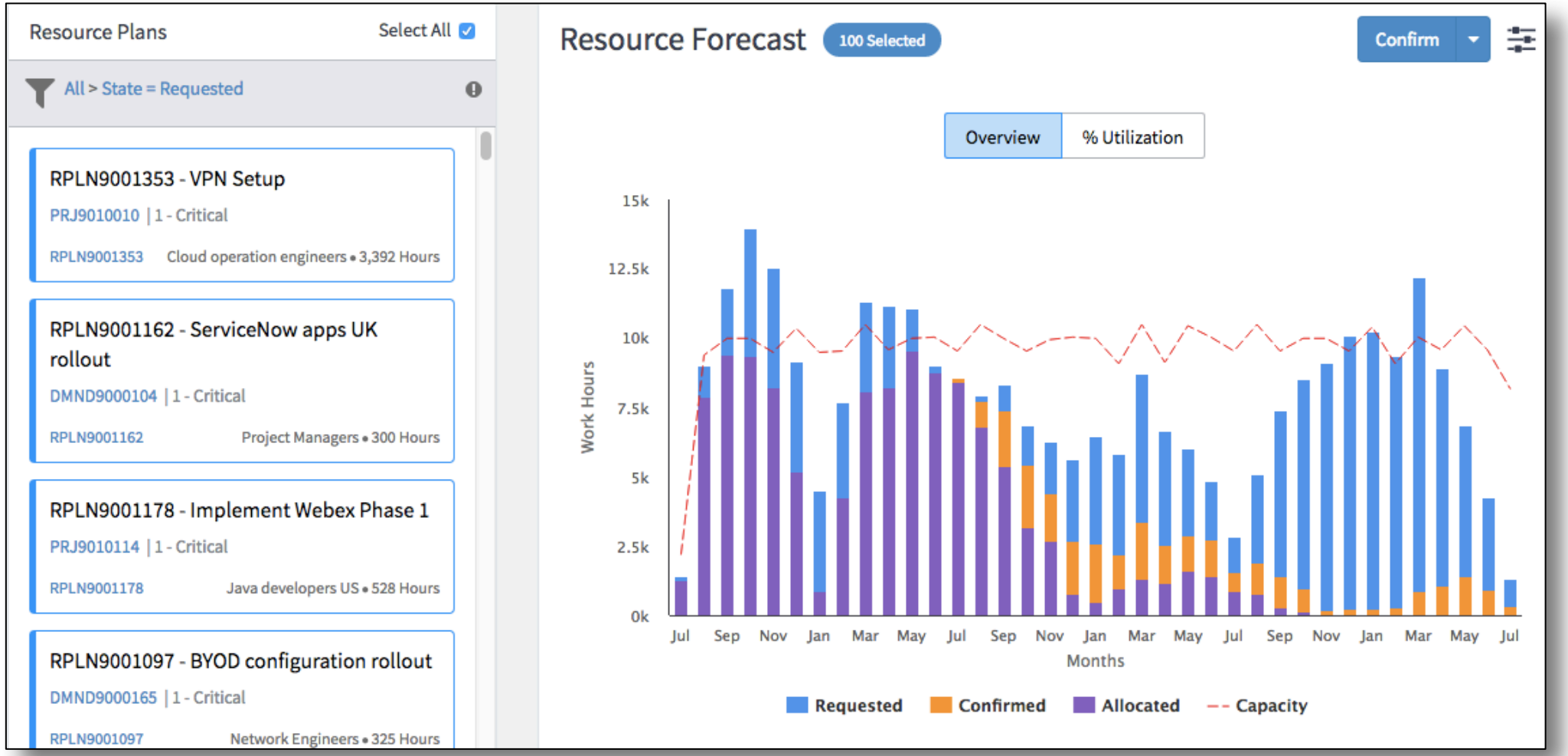
Project Budget & Forecasting

- This feature enables project and portfolio managers to adjust their budget for future periods based on actual spend and changed project requirements.
- Allows project managers to re-estimate (forecast) planned cost for their projects during project execution.
- Forecasted project cost gets rolled-up at portfolio level so that the portfolio manager can create the forecast plan for the portfolio.
- Portfolio manager can also include/exclude projects while forecasting for the remaining year to balance cost and resources.

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Resource Management



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Lab Goal

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

Lab 2.1 Resource Management

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Resource Management

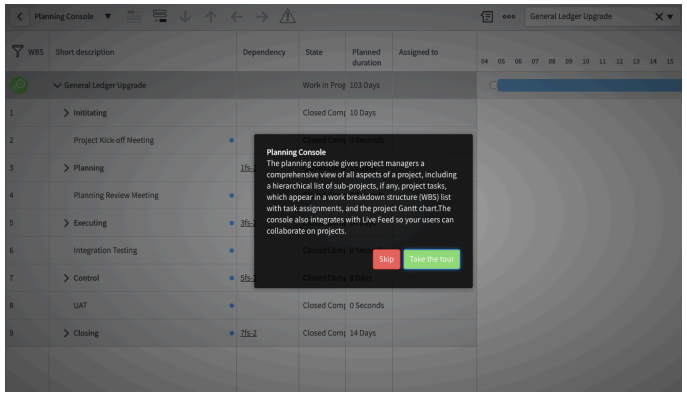
- Allows project managers to request resources in terms of roles and skills and also provides ability to specify specific hours/FTE for each week/month.
- Provides an efficient way to the resource managers to confirm and allocate resources to the in-coming resource requests.
- This feature benefits both project managers (resource requestors) and the resource managers. Project managers can be very specific and detailed while sending out request for resources. At the same time, the job of the resource manager becomes easier as they can perform resource confirmation and allocation in an efficient manner.

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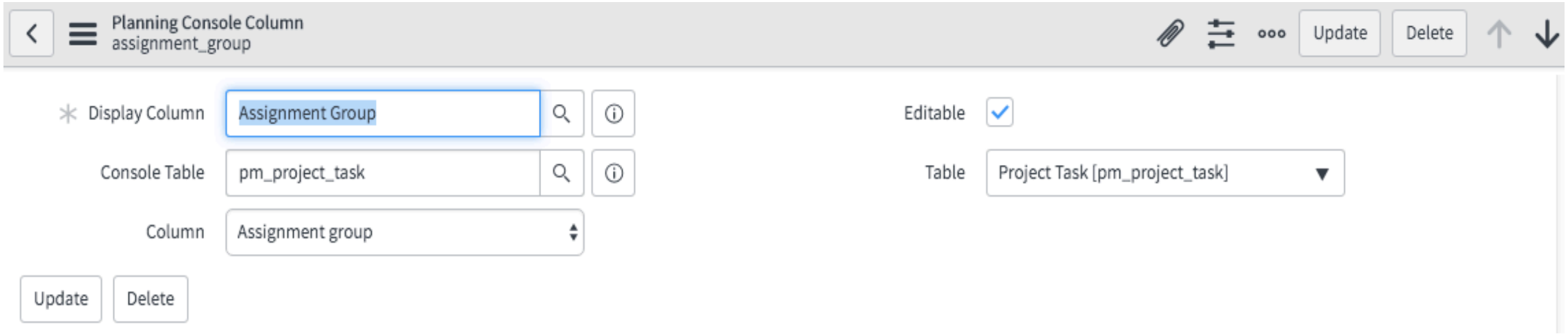
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Note!

- If a **Take a tour** pop up appears select **Skip**



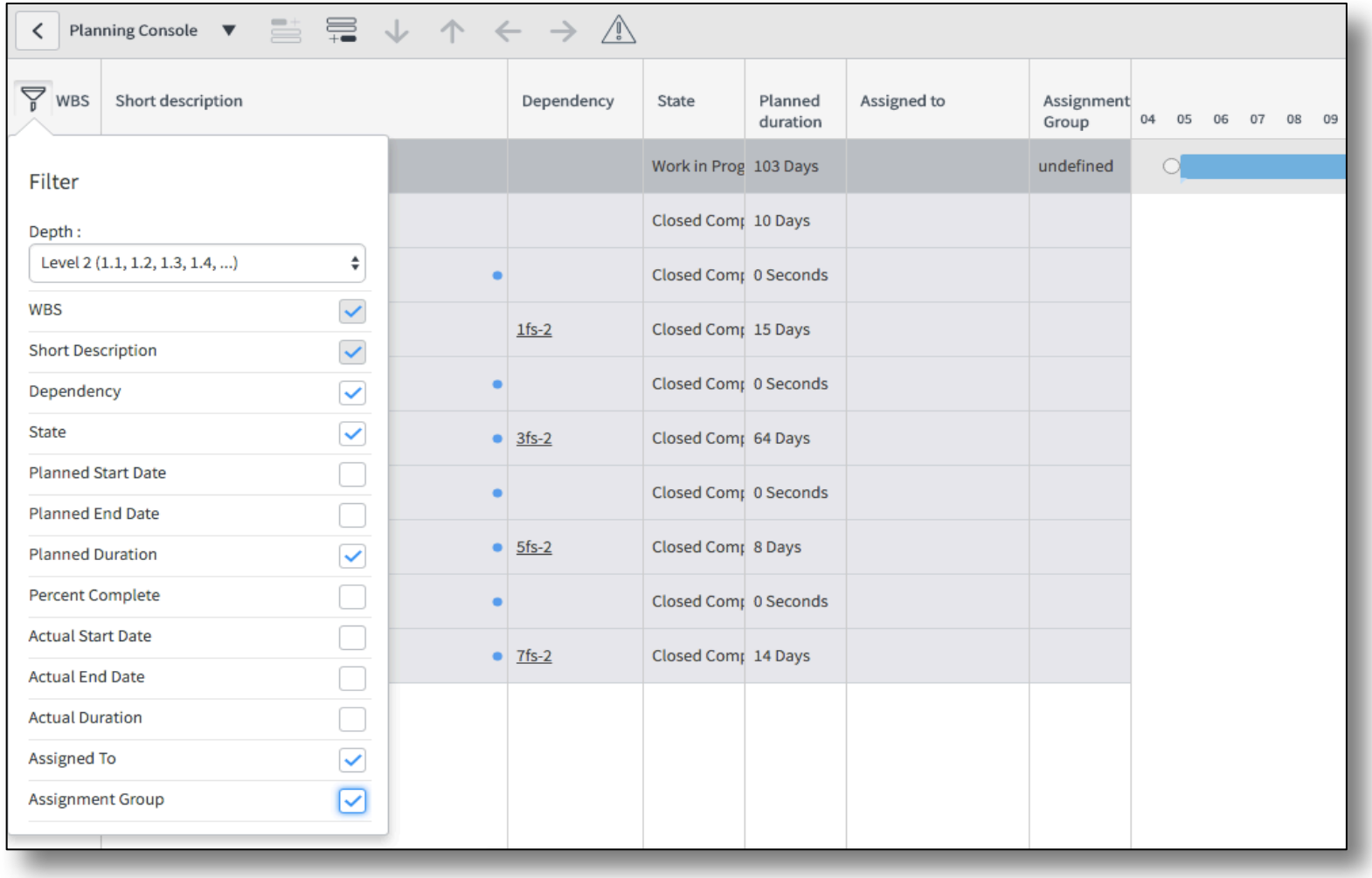
- In step 9, select **pm_project_task** for console table instead of pm_project and make sure column = **Assignment Group**. Your screen should look like this



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Planning Console



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Lab Goal

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

- Extend the Planning Console with more columns

Lab 3.1 Planning Console

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Planning Console

- It provides a configuration for the planning console, so that user can add and remove columns on the planning console.
- User can choose which columns can be made editable.
- Allows planning console to work with fine-grained security based on ACLs.
  - e.g., If user does not have Create permission on project task, only create action on project task would be turned off on Planning console; or if user does not have Delete on project task, only delete action on project task would be turned off.

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Time Sheets

Generate Time Cards
Copy from previous time sheet

Time Cards | New | Go to | Category | Search | 1 to 3 of 3

Time sheet = 2017-04-16

		Category	Task	Top task	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
☐	ⓘ	Project/Project Task	PRJTASK0017433	PRJ0090811	0	5	3	0	0	0
☐	ⓘ	Project/Project Task	PRJTASK0017426	PRJ0090811	0	0	4	4	8	0
☐	ⓘ	Project/Project Task	PRJTASK0017434	PRJ0090811	0	0	0	4	0	5
+		*Insert a new row...*								
					Sum 0	Sum 5	Sum 7	Sum 8	Sum 8	Sum 5

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Lab Goal

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



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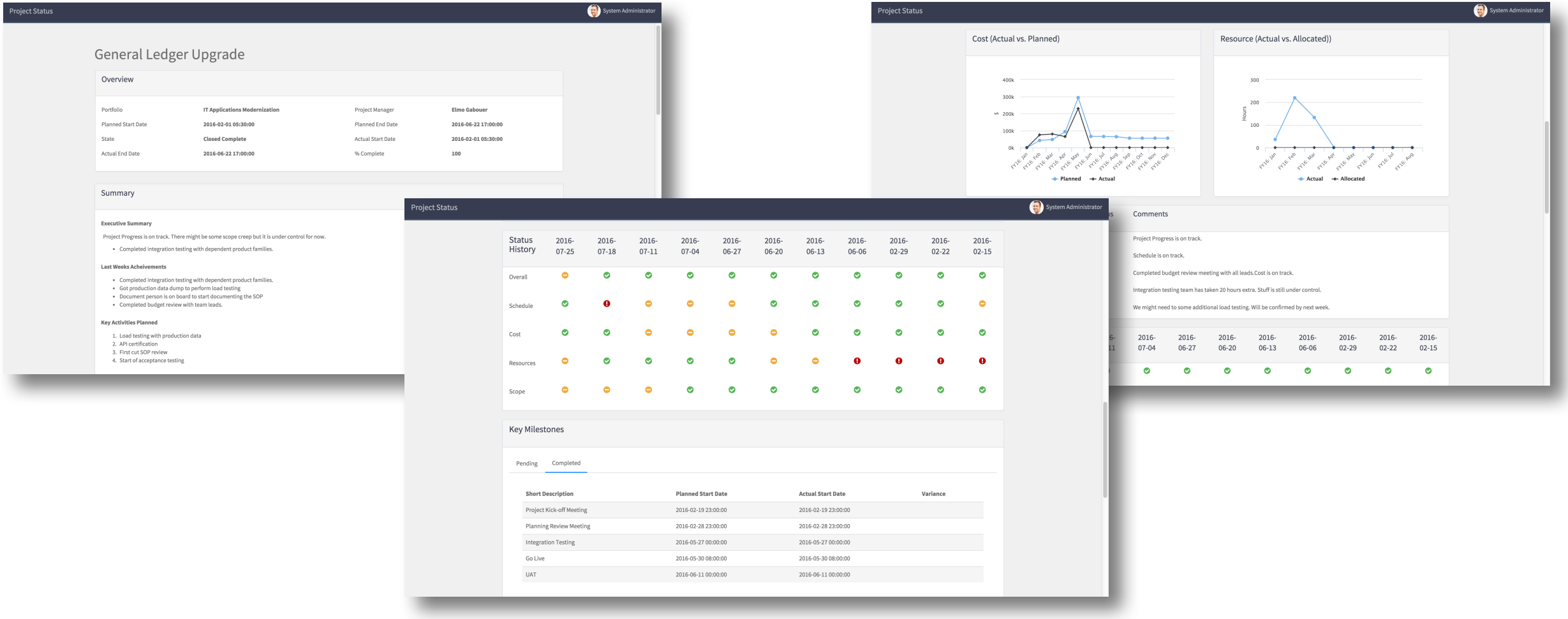
Time Sheets

- This enhancement provides an easier way to generate, fill, and approve time cards which makes the time tracking process much simpler and encourages team members to report their time more regularly and accurately.
- This feature benefits time card users, time card approvers, and admin. It provides an easier way to fill and approve time sheets that provides better time and project cost tracking.

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Project Status Reporting



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Lab Goal

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

Lab 5.1 Project Status Reporting

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Project Status Reporting

- Provides much more information about a project, such as pending and completed milestones, project risks, issues, and changes.
- It also shows the historical trend of project KPIs (cost, resource, scope and schedule) to understand how these KPIs have changed week over week during project execution.
- This is a service portal-based report so customers can configure the content and the layout based on their requirements.
- This feature benefits both project managers and project stakeholders. The project managers can generate detailed project status report for project stakeholders. More importantly, the status report can be configured based on the specific needs of the stakeholder.

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Top Takeaways

1

Benefit from continued investment in ITBM

2

Embrace the “Better Together” story

3

Report at Lightspeed at all levels

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Thank You

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Q & A

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