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

Lab Guide

Project and Portfolio Management 201

Emily McMullin & Molly Feterl

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

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

Lab Goal

Lab 1 Setup Global Search

This lab explains how to set up the project environment to support our Project Management process, including:

- **Adding Projects, Project Tasks and Portfolios to Global Search**
- Enabling Live Feed for the Project
- Setting up the use of WBS in the Gantt chart
- Adding WBS to the Project and Task Related Lists

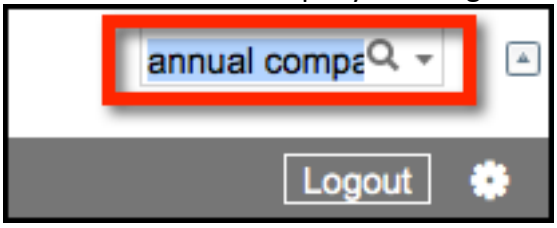
Adding project tables to the global search allows you to quickly navigate to known projects or perform simple searches against project related tables.

Log on to Your Training Instance

1. Login to the provided training instance URL using the **admin** credentials on the cover

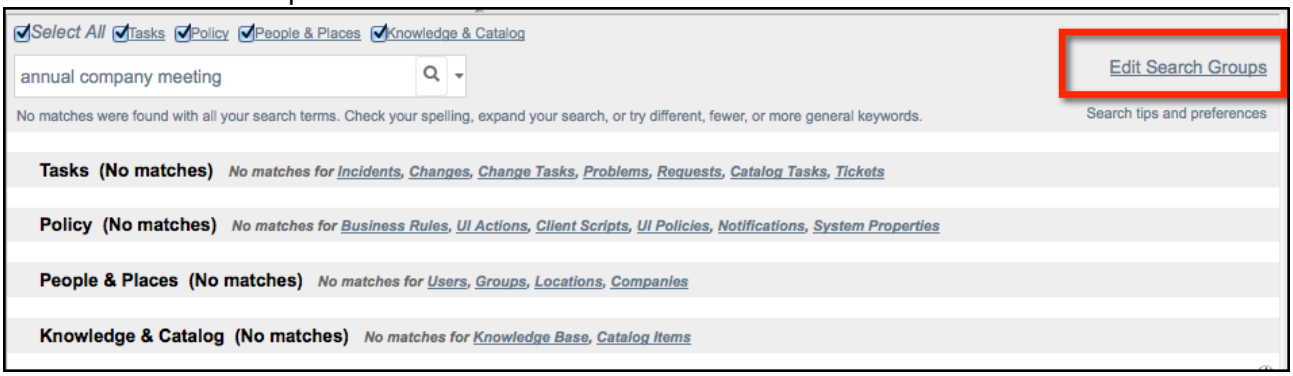
Add Project fields to Global Search

1. Search for Annual Company Meeting in the **Global Search.**

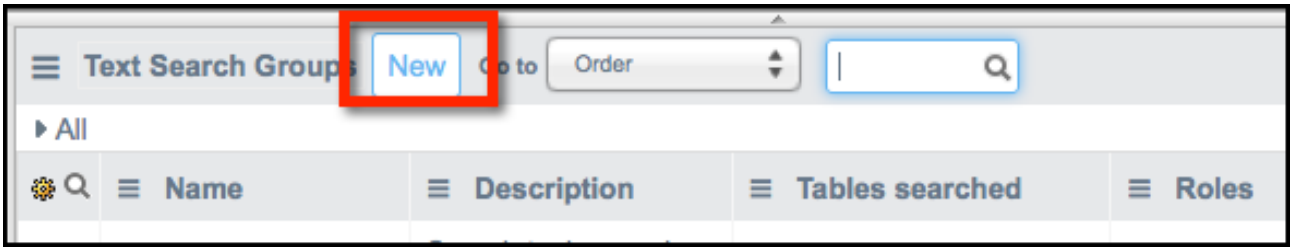


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2. Click Edit Search Groups.



3. Click New.



4. Complete the Information as listed below:

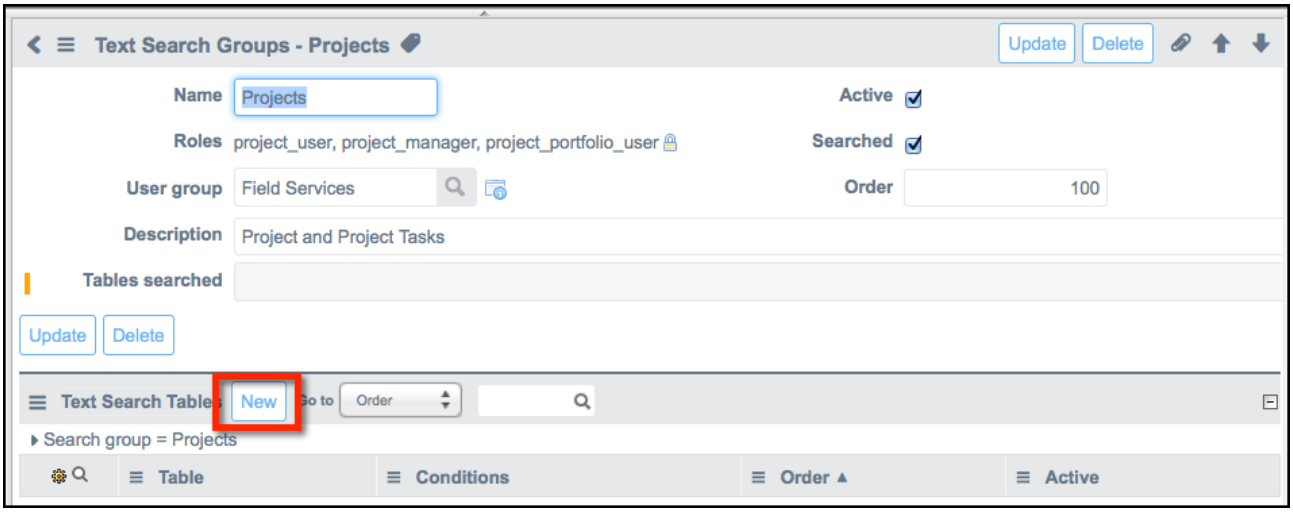
   Name: Projects
   Roles: project_manager, project_portfolio_user, project_user
   Description: Projects and Project Tasks

5. Click **Submit**.

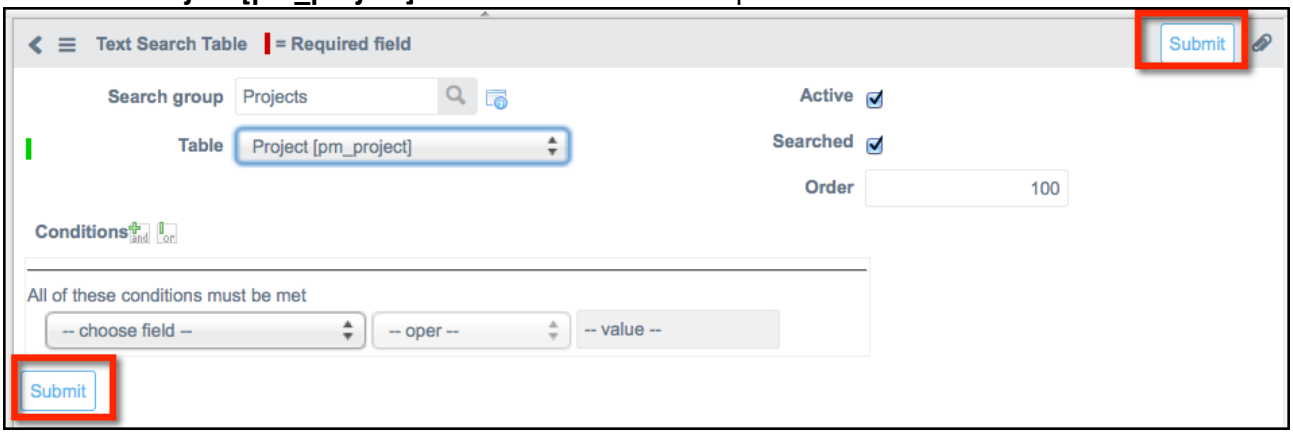
6. Click the newly created Search Group: **Projects**.

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7. Click **New** in the **Text Search Tables** related list.



8. Select the **Project [pm_project]** table from the table drop-down list and click **Submit**.



9. Repeat for the **Project Task [pm_project_task]** table.

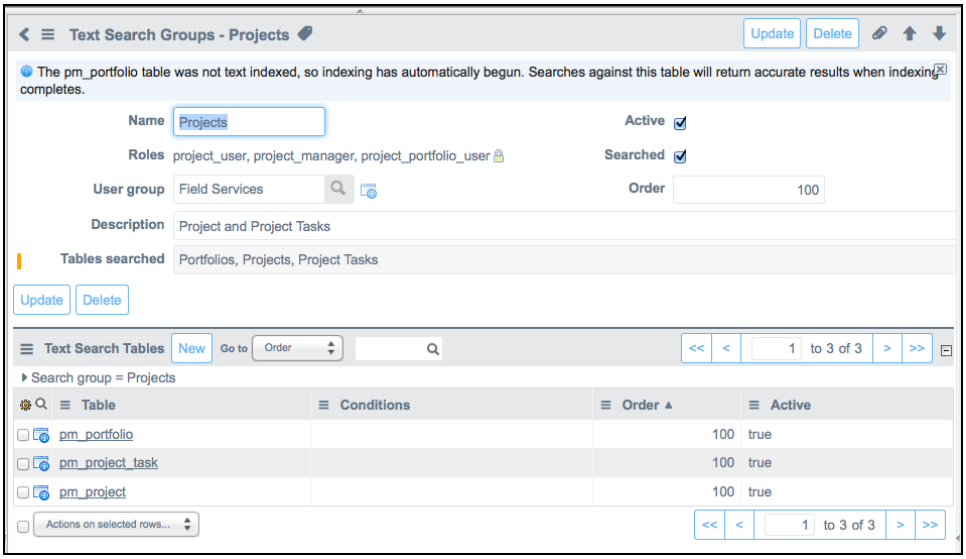
10. Repeat for the **Portfolio [pm_portfolio]** table.

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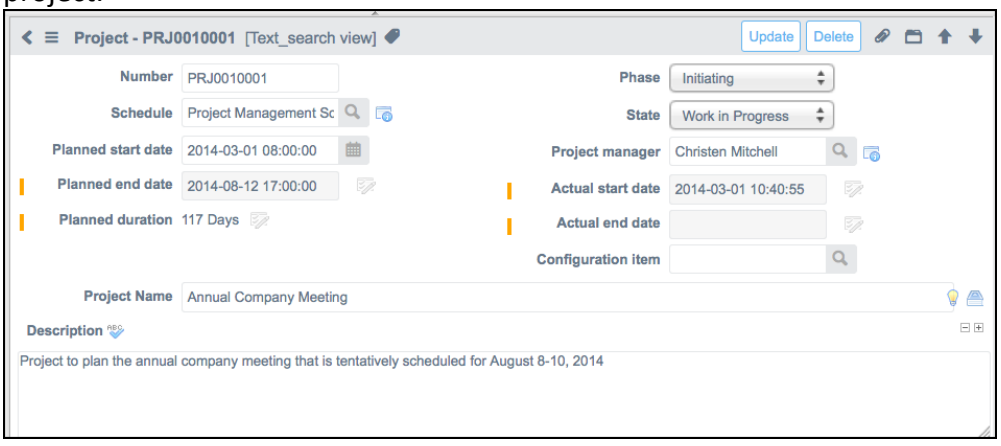
Lab Success Verification

NOTE: Below is information on how to submit your progress on the lab. Please review this information below the success steps.

1. Your screen should look like this:



2. Search again for **Annual Company Meeting** in the Global Search and you should find the project.

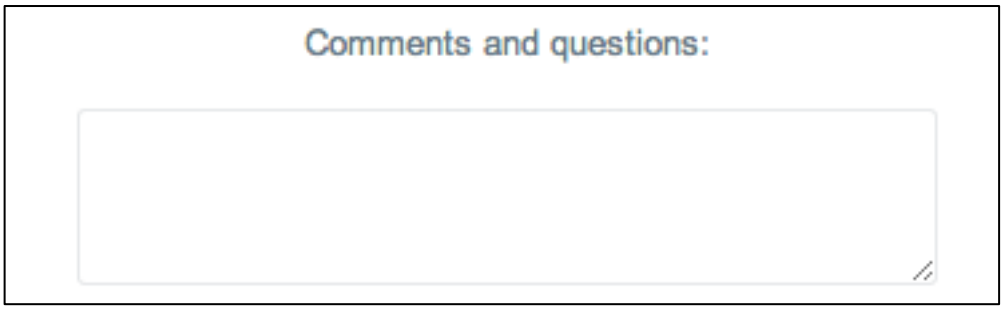


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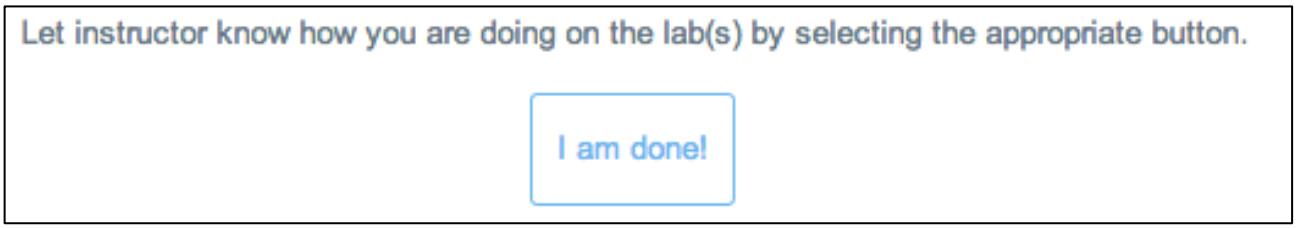
Progress Report

1. Navigate to **Lab Management > Report Lab Progress**.

2. Enter any comments you wish to make regarding this lab.



3. 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

Lab 2
Enable
Live Feed

This lab explains how to set up the project environment to support our Project Management process, including:

- Adding Projects, Project Tasks and Portfolios to Global Search
- **Enabling Live Feed for the Project**
- Setting up the use of WBS in the Gantt chart
- Adding WBS to the Project and Task Related Lists

Live feed will allow for project team members to collaborate on the project.

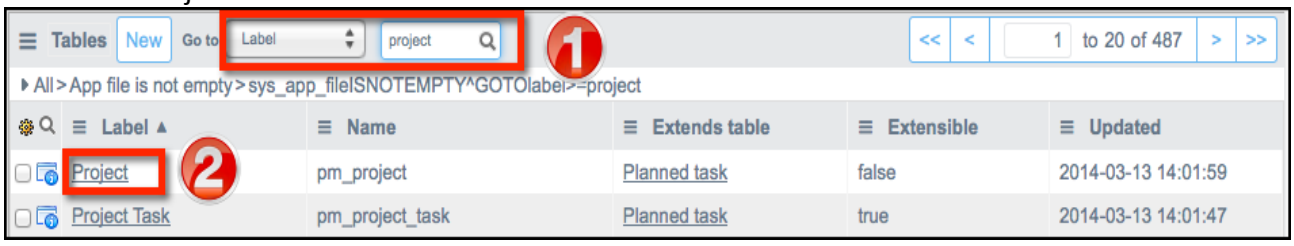
Add Live Feed to the Project Table

1. Navigate to **System Definition > Tables**.

2. Search for the project table by using the following steps.

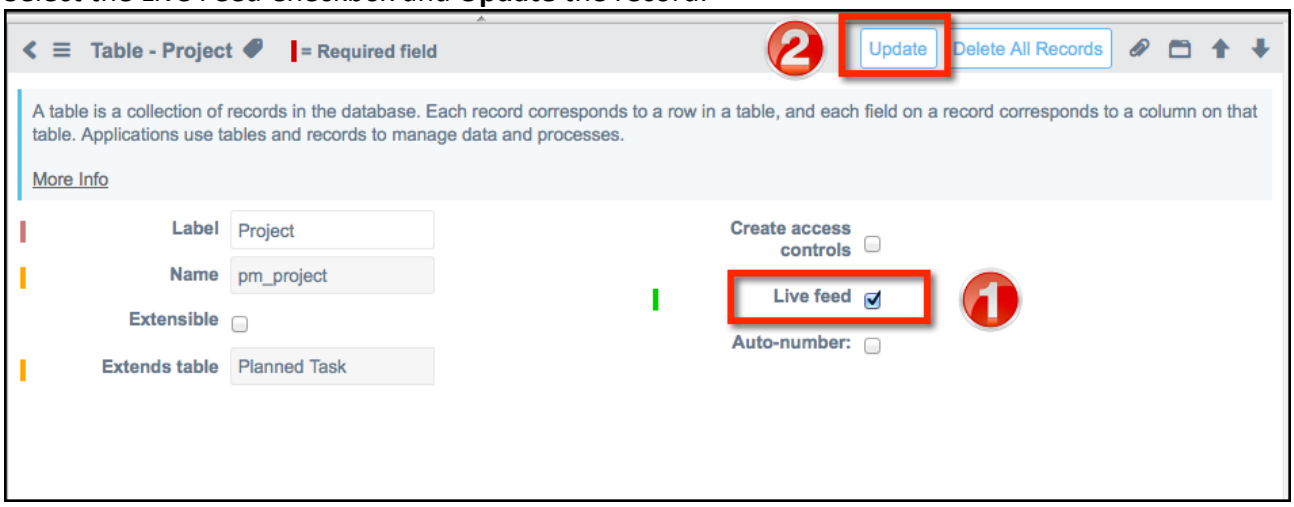
   Change the **Go to** value to **Label** if not already selected.
   Enter the search string **project**.
   Click the **search** icon.

3. Select the Project Table.



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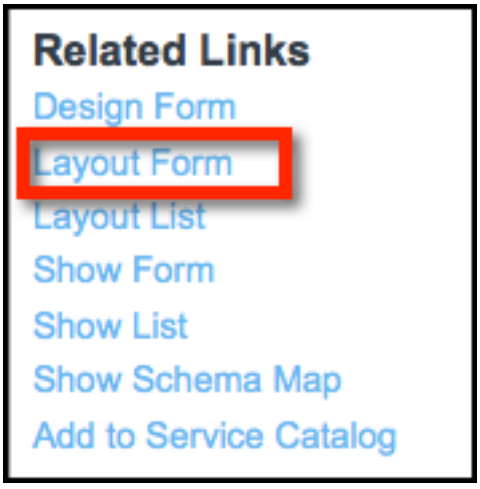
4. Select the Live Feed Checkbox and **Update** the record.



Add Work Notes and Activities to Project Form

1. When you are returned to the list view of tables, **select the Project Table** again.

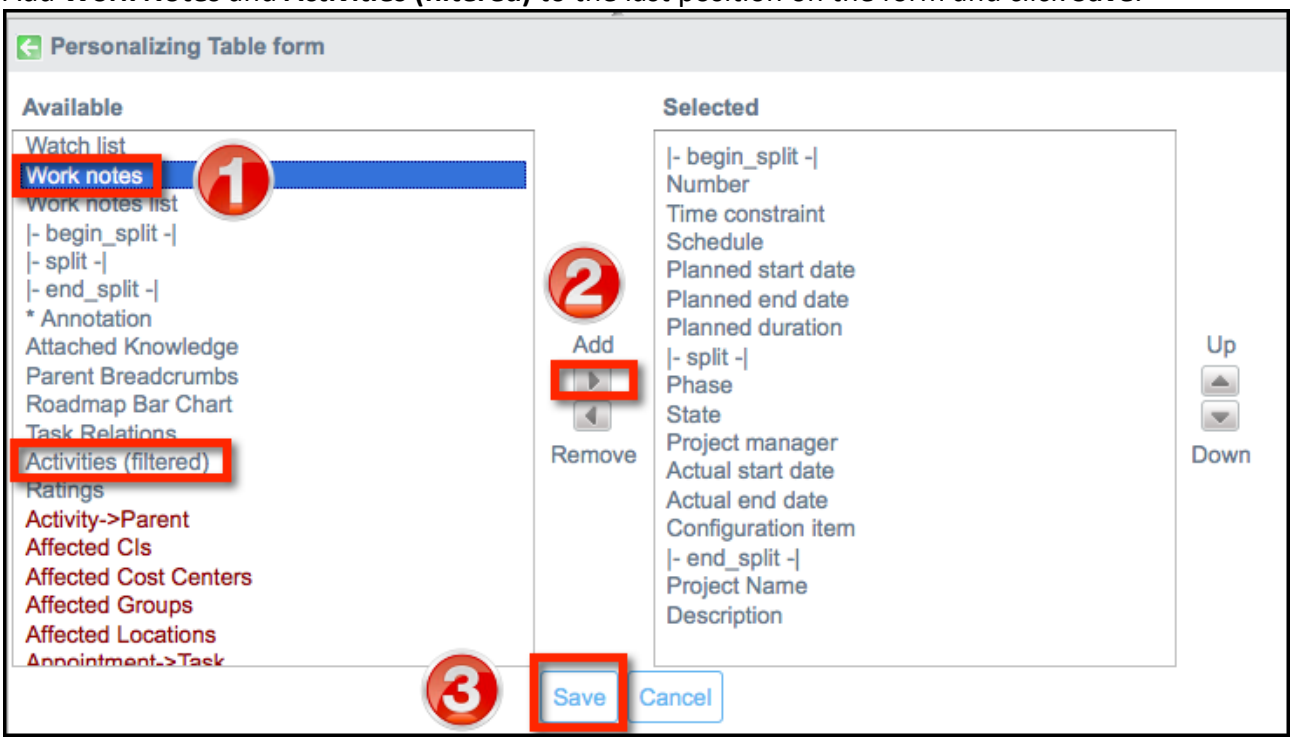
2. Scroll down past the Dictionary Entries and Select the **Related Link** (UI Action) to **Layout Form**.



NOTE: Use the **Design Form** UI action to try out the new Eureka Forms Designer!

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3. Add **Work Notes** and **Activities (filtered)** to the last position on the form and click **Save**.



Lab Success Verification

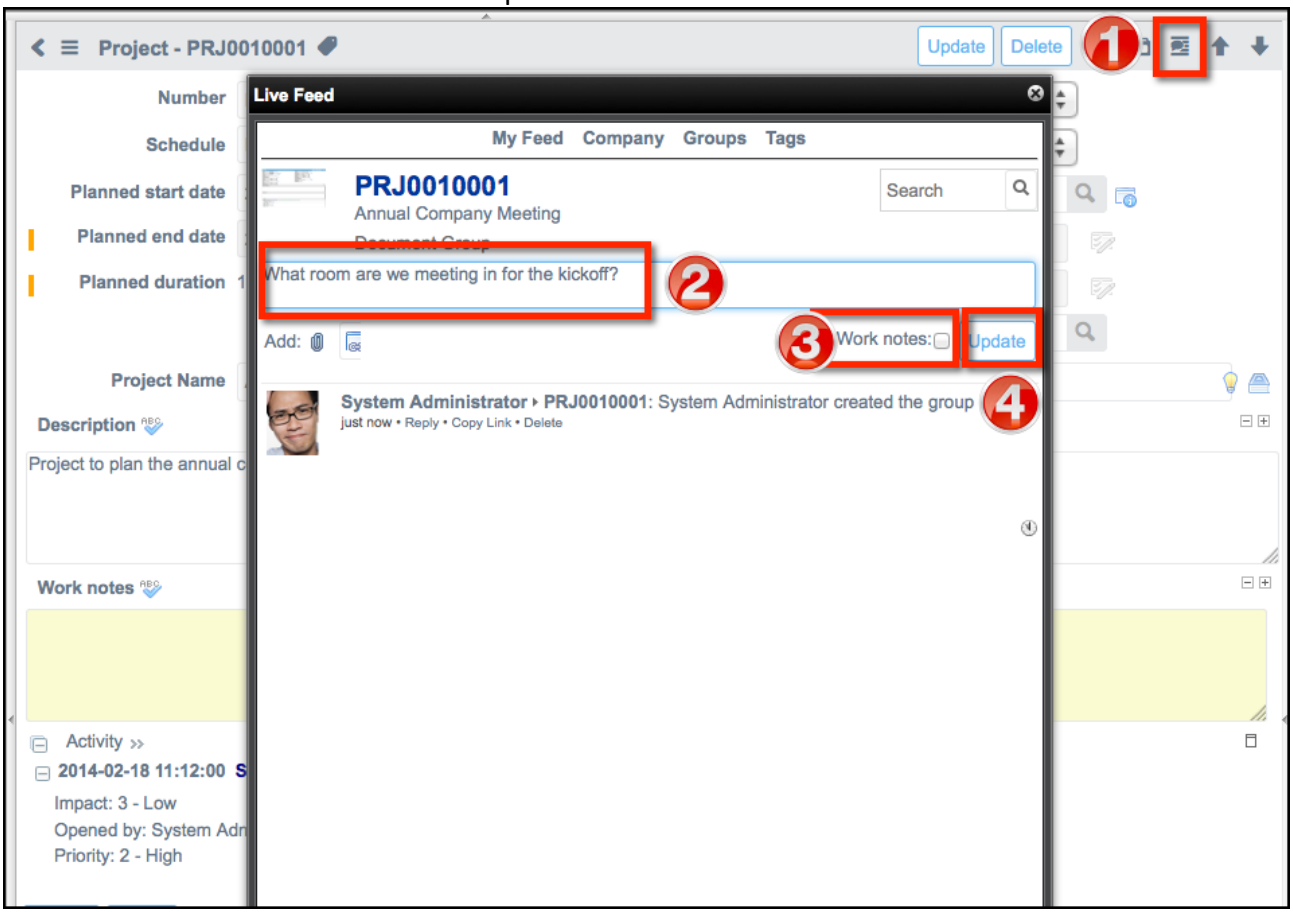
1. Search for “Annual Company Meeting” in the Global Search.

2. Select the Project to view it.

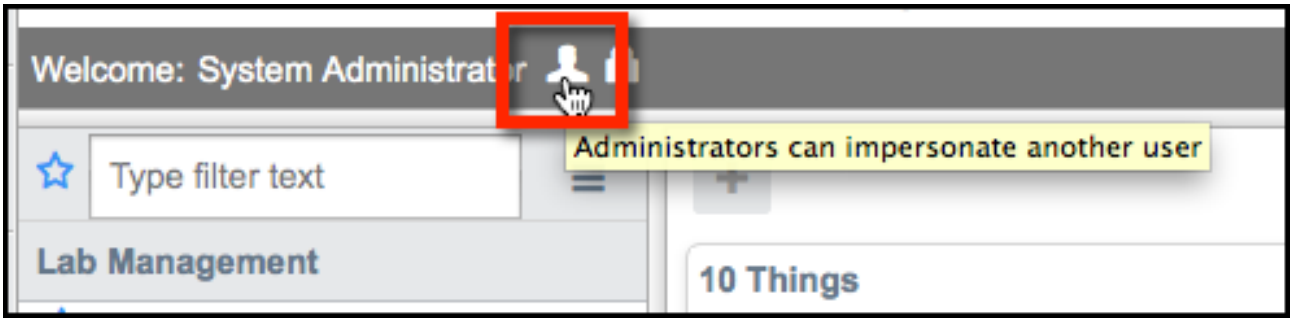
3. You should be able to click the Live Feed icon and view the Live Feed for the Project.

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4. Make a comment on the live feed and post it as a work note.



5. Impersonate Christen Mitchell using the Person Icon. Select the name **Christen Mitchell** and then click **OK**.



6. Find the **Company Meeting** project using the **Global Search**.

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7. Join the live feed by **clicking on the Live Feed** icon in the project.

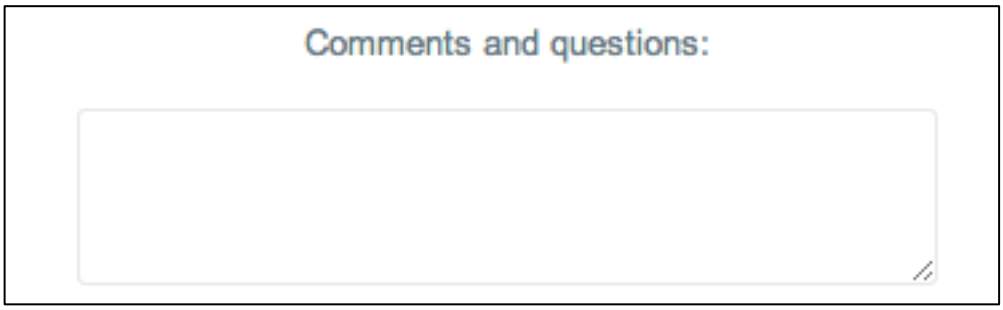
8. **Reply** to the previous post adding your comment as work notes and adding an attachment.

9. Impersonate the System Administrator using the Person Icon like step **5** above.

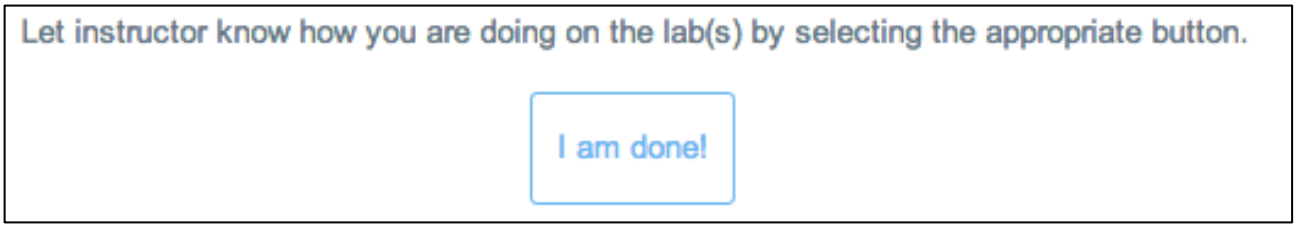
10. Double-click on **System Administrator** to return to this user.

11. Click on **the Lab Management > Report Lab Progress Edge** icon.

12. Enter any comments you wish to make regarding this lab.



13. 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

This lab explains how to set up the project environment to support our Project Management process, including:

- Adding Projects, Project Tasks, and Portfolios to Global Search
- Enabling Live Feed for the Project
- Setting up the use of WBS in the Gantt chart
- Adding WBS to the Project and Task Related Lists

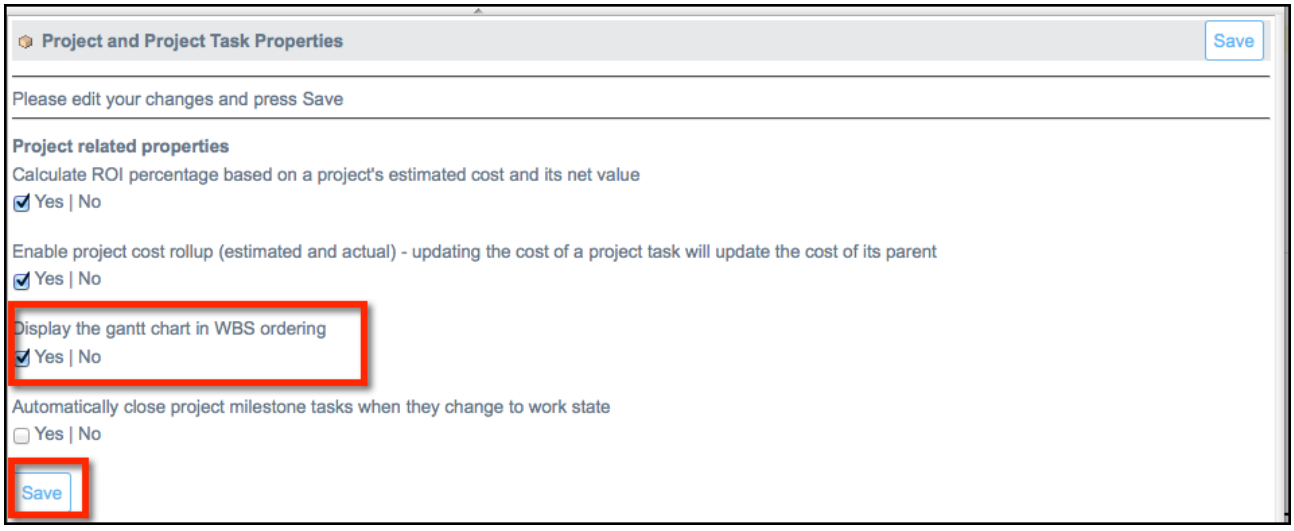
Lab 3
Setup WBS

Enable Gantt Chart WBS Ordering

1. Navigate to **Project > Administration > Properties**.

2. Select the check box for **Display the Gantt chart in WBS ordering**.

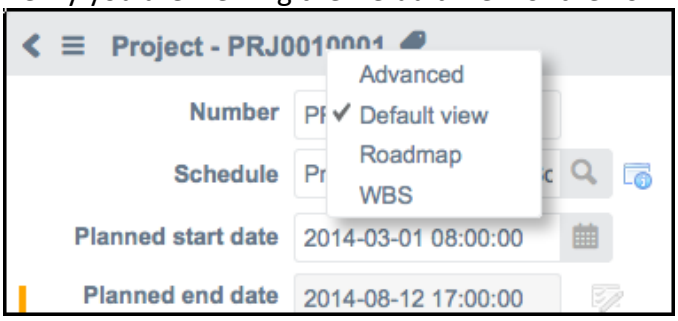
3. **Save** the record.



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Add WBS Fields to Project Related Lists

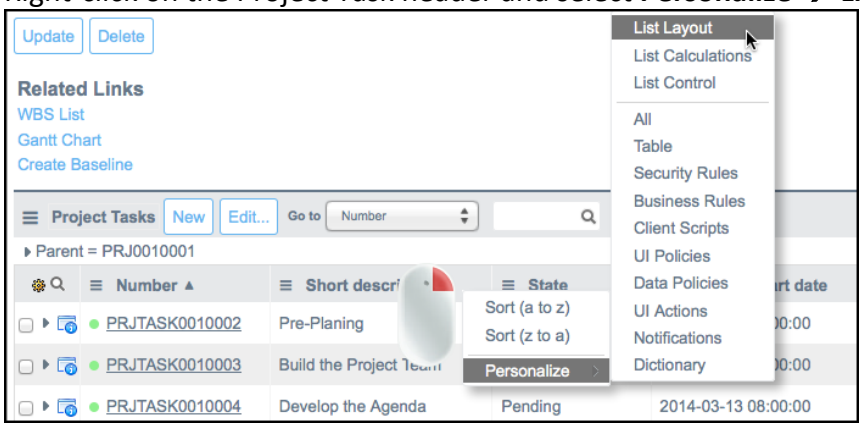
1. Navigate to **Projects > Work in Progress**.
2. Select any Project.
3. Verify you are viewing the Default View of the Form.



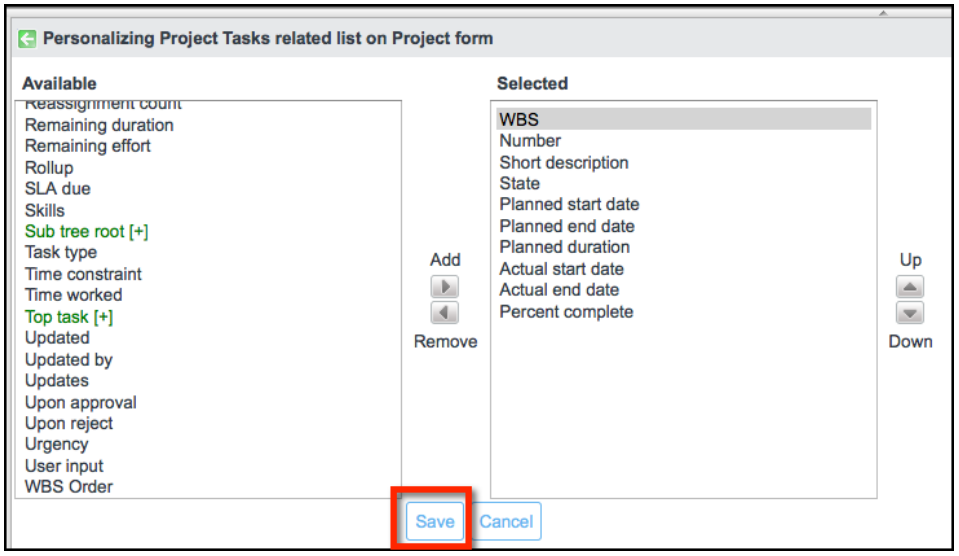
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4. Add the **WBS** field to the **Project Task Related List** using the following steps**:**

   a. Right-click on the Project Task header and select **Personalize → List Layout**.



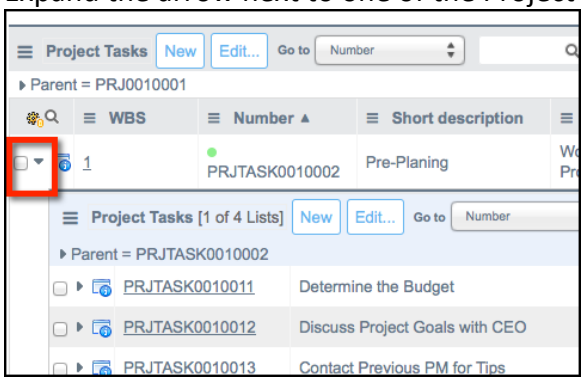
   b. Select the **WBS** field from the **Available list**.
   c. Add to the **WBS** field to the **Selected List**.
   d. Move the **WBS** field to the first position in the list by using the **up arrow.**
   e. Click **Save**.



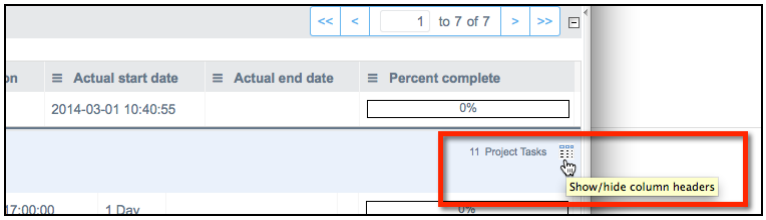
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5. Repeat this process for the Subtasks by performing the following steps:

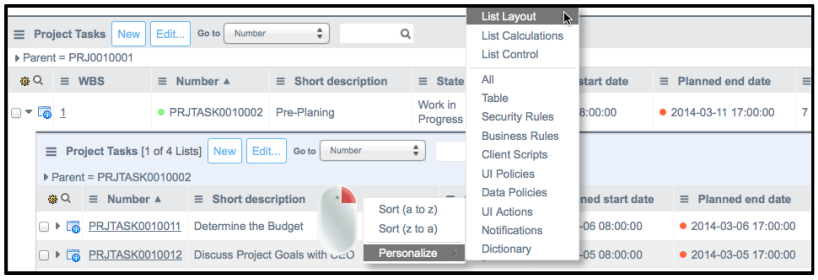
   a. Expand the arrow next to one of the Project Tasks to reveal the nested related list.



   b. On the far right edge of the header for the subtasks, click the icon to enable the column headers.



   c. Right click on the header for the nested project tasks and select **Personalize → List Layout.**



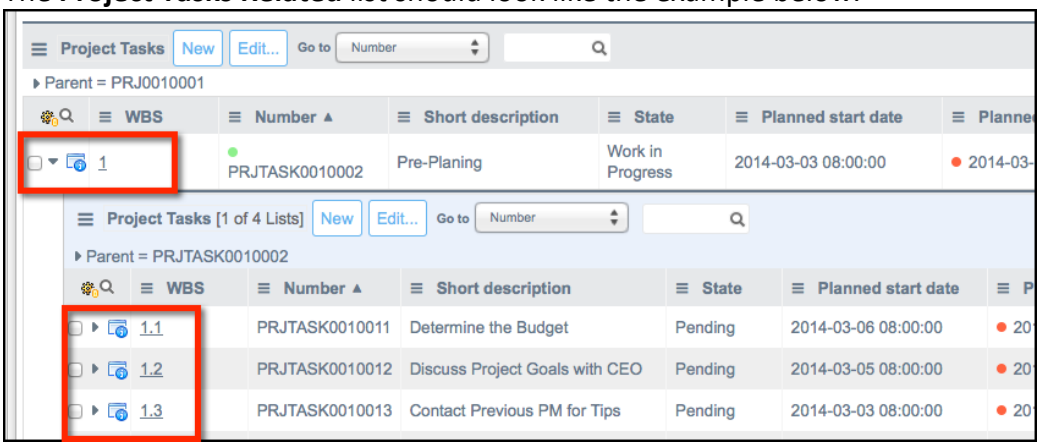
   d. Select the **WBS** field from the Available list.
   e. **Add** to the WBS field to the Selected List.
   f. Move the WBS field to the first position in the list by using the **up arrow.**
   g. Click **Save**.

Lab Success Verification

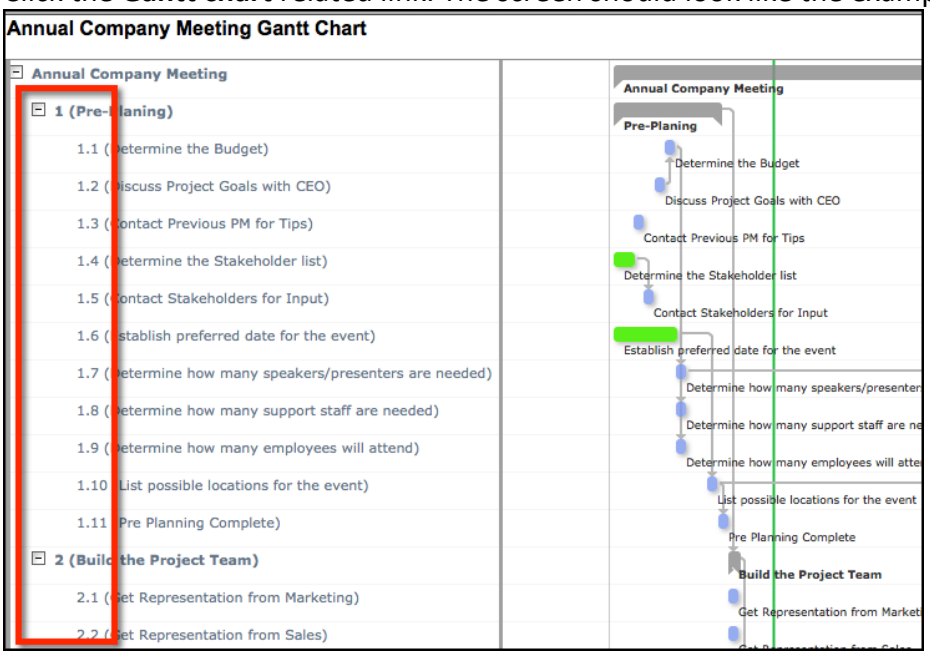
1. Navigate to the **Annual Company Meeting** project.

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2. The **Project Tasks Related** list should look like the example below.



3. Click the **Gantt chart** related link. The screen should look like the example below:



4. Click on the Lab Management > Report Lab Progress Edge icon.

5. Enter any comments you wish to make regarding this lab.

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

Congratulations! Now go tell your SysAdmin to add this functionality to your Dublin instance!!!

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Lab Goal

The Project Manager for the Company Meeting Project is requesting a modification to company travel software to support the Meeting. He needs to make this change part of the project plan and track its progress in the plan.

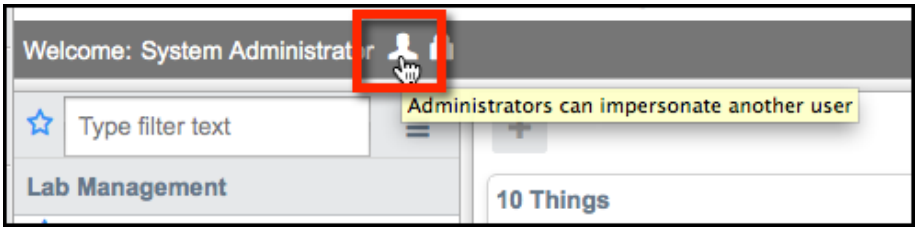
This lab explains how to:

- Add a Project Task for the Change
- Create a Related Infrastructure Change Request

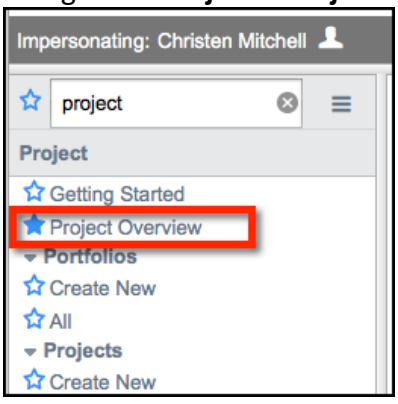
Lab 4 Using Project Change Links

Add a Project Task to the Annual Company Meeting Project

1. **Impersonate** Christen Mitchell using the **Key** icon. Select the name **Christen Mitchell** and click **OK**.



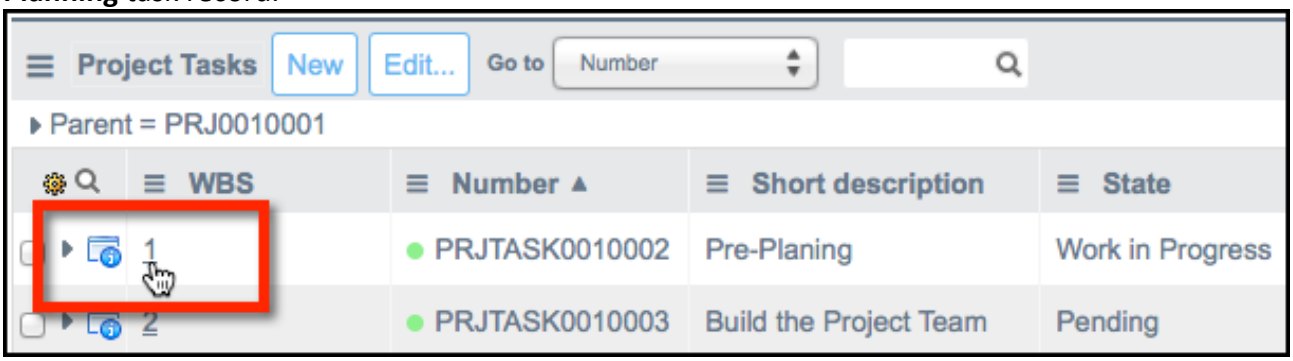
2. Navigate to **Project > Project Overview**.



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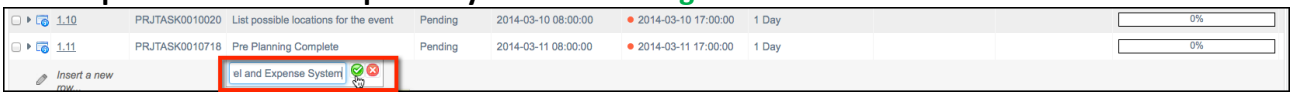
3. Select the Annual Company Meeting project from the Active Projects List. You will need to scroll all the way to the bottom of the dashboard. These Dashboards are still Work in Progress for Eureka.

4. Select the task for Pre-Planning by clicking on the WBS hyperlink. The will drill down to the **Pre-Planning** task record.



5. Add a new task to the Pre-Planning Phase by double clicking in the **Short Description** for the **Insert a new row…** in the Project Tasks Related list field.

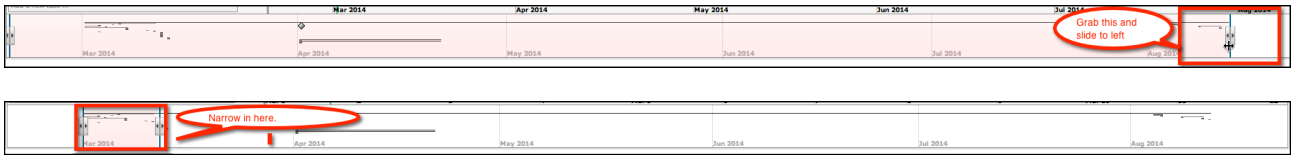
6. Enter **Update Travel and Expense System.** Click the **green** check to submit the task.



7. Click the Gantt Chart Related link.

8. Create a **Finish to Start Relationship** between the new task (**Update** the **Travel and Expense System**) and the **Pre-Planning Complete Task**.

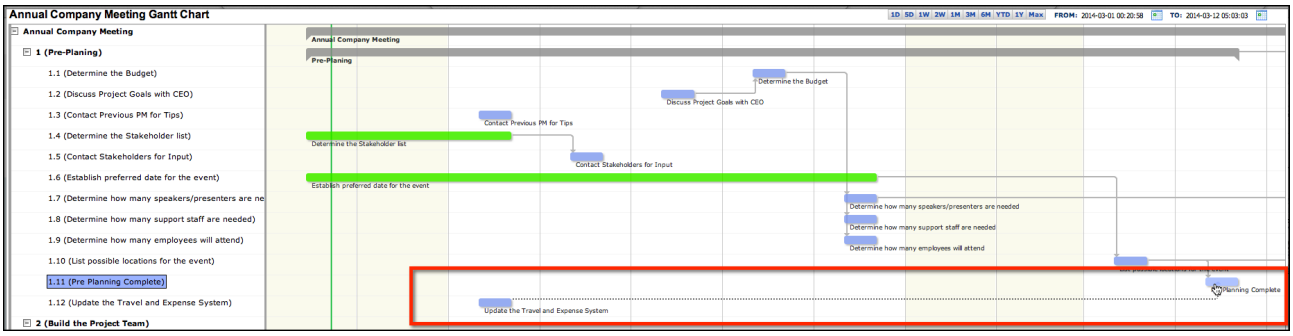
NOTE: You can use the slider bar at the bottom of the Gantt chart to narrow the window of time you are looking at and also to make the task bars bigger.



9. Place your cursor over the **Update the travel and Expense system** task and **Click and drag** to the **Preplanning Complete** task to create the relationship.

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10. Select **OK** at the confirmation box.

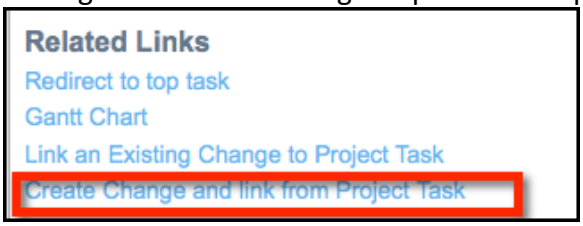


NOTE: you will see the successor tasks highlighted on the left navigator when the focus is on the task.

11. Close the Gantt Chart window.

12. Select (drill into) the **Task 1.12 – Update Travel and Expense System**.

13. Click the Related Link to **Create Change and link from Project Task.** This will allow the Project Manager to create a change request to complete the work on the Travel and Expense System.



14. Populate the following fields in the Change Request:

    Category: **Software**
    Description: **Please update the Travel and Expense system to add the Company meeting as an expense type and allow booking of travel.**
    Configuration Item**: CMS App FLX**
    Requested by date: pick a date in May
    Assignment Group: **Application Developers**

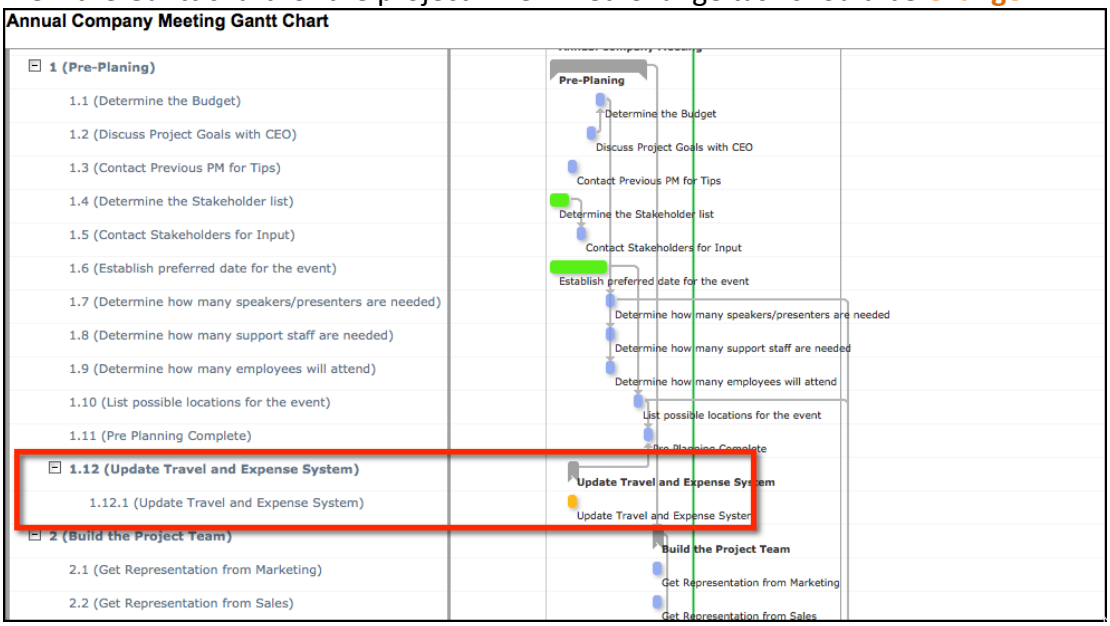
15. Right-click the Change header and select **Save**.

16. Navigate back to the project task or the project using the **Back** button by the Change Label or by other means.

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Lab Success Verification

1. View the Gantt chart for the project. The linked Change task should be **Orange**.



2. Drill into the task by double-clicking the orange marker on the Gantt to see the details of the linked task.

3. As the admin, login and find the change.

4. Update the **Planned Start** and **Planned End** dates for the change. What happens to the dates in your plan?

5. Click on the **Lab Management > Report Lab Progress Edge** icon.

6. Enter any comments you wish to make regarding this lab.

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

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Lab Goal

This lab explores the elements of the Resource Planning and Costing. It also explains how to Create a Resource Plan for part of the project.

- Setup Data for **Resource Management Costing** and **Calendaring**
- Create a Resource Plan
- Fulfill the Resource Plan
- Complete a Task allocated to a Named Resource
- View Costing Information collected in the project

Lab 5
Data for Resource Management

Set up Data for Costing – Group Record

1. Navigate to **System Security > Users and Groups > Groups**.

2. Select the **Field Services Group**.

NOTE: If you do not see the **Roles** tab, look at the view you are using and ensure it is the Default view, not the Resource Manager View. This view does not include the Roles tab.

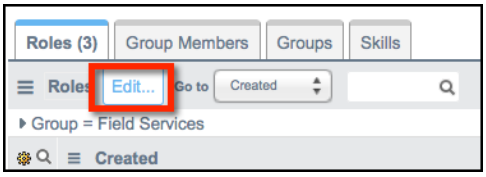
3. Enter an **Hourly Rate** for the **Field Services** Group. For example: **75**.

4. Select **Alex Linde** as the Manager for the Field Services Group.

5. Right-click the Header of the Group record and select **Save**.

NOTE: if you click Update, you will need to go back into the Group record to perform the next step.

6. Click **Edit** on the Roles Tab.

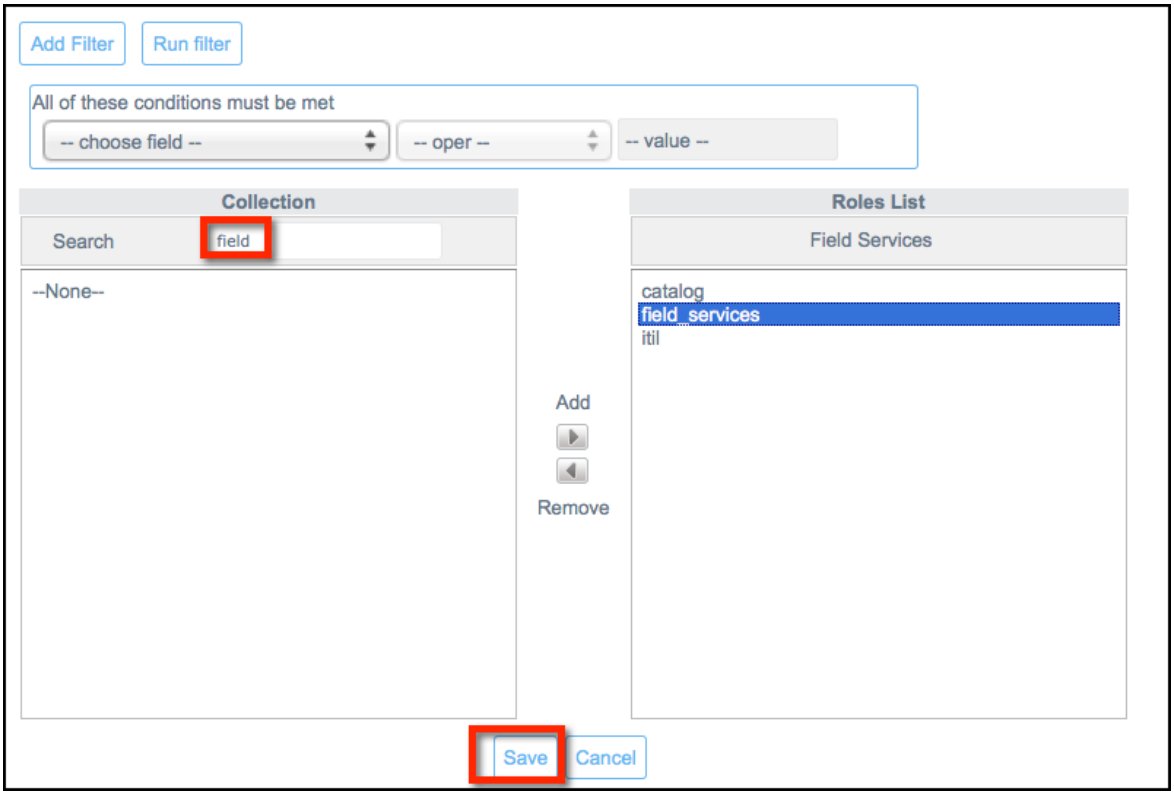


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7. Add the **field_services** role to the roles list.

   NOTE: The field_services role contains the resource_user role and the project_user role.

8. Click **Save**.



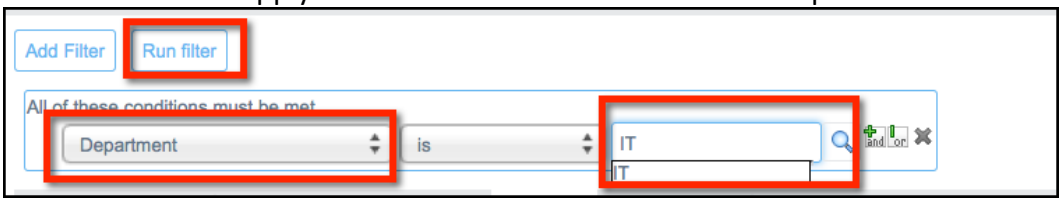
   Note: You can use the search field in the collection to more quickly find the role.

9. Click **Edit** on the **Group Members** related list to add members to the Field Service Group.

10. Select **Department** from the Field Selector below "All of these conditions must be met".

11. Enter **IT** into the reference box and select the IT record.

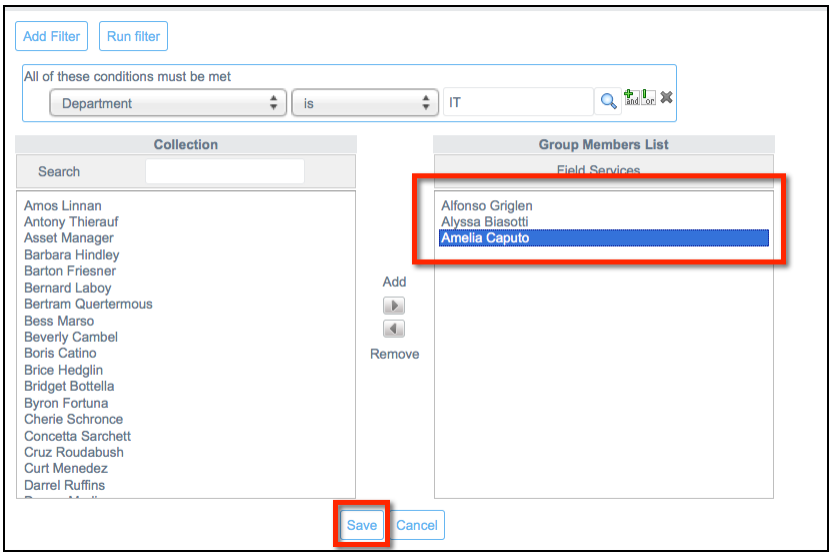
12. Click **Run Filter** to apply the filter of users who are in the IT Department.



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13. Select 3 or more members of IT to be in Field Services and add them to the Group Members list.

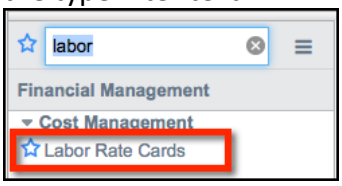
    Write their names HERE _____



14. Click **Save** to return to the Group record.

Set up Data for Costing – Labor Rate Card

1. Navigate to **Financial Management > Cost Management > Labor Rate Cards** by typing **Labor** in the type filter text.



2. From the Labor Rate Cards list, click **New** to be presented with a new Labor Rate Card definition.

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3. Enter the following information for the Labor Rate Card:

   Name: **Field Services**
   Rate code: **FS1**
   Short Description: **Field Services for IT**
   Hourly Rate: **Rate used in above exercise for Field Services**
   Condition:
   Department is **IT**
   And
   Roles is **field_services**



4. Use the Update Count refresh button to execute the condition. You should have the number of records match that corresponds to the number of users you added to the Field Services Group.



5. Click **Submit** to save the rate card.

6. Select the **Service Desk** Labor Rate Card.

7. Add an “and” condition to the filter for **Roles is not field_services**.

8. Refresh the filter and ensure the records decrease by the number of users that you added to the Field Services Group.

9. Update the record.



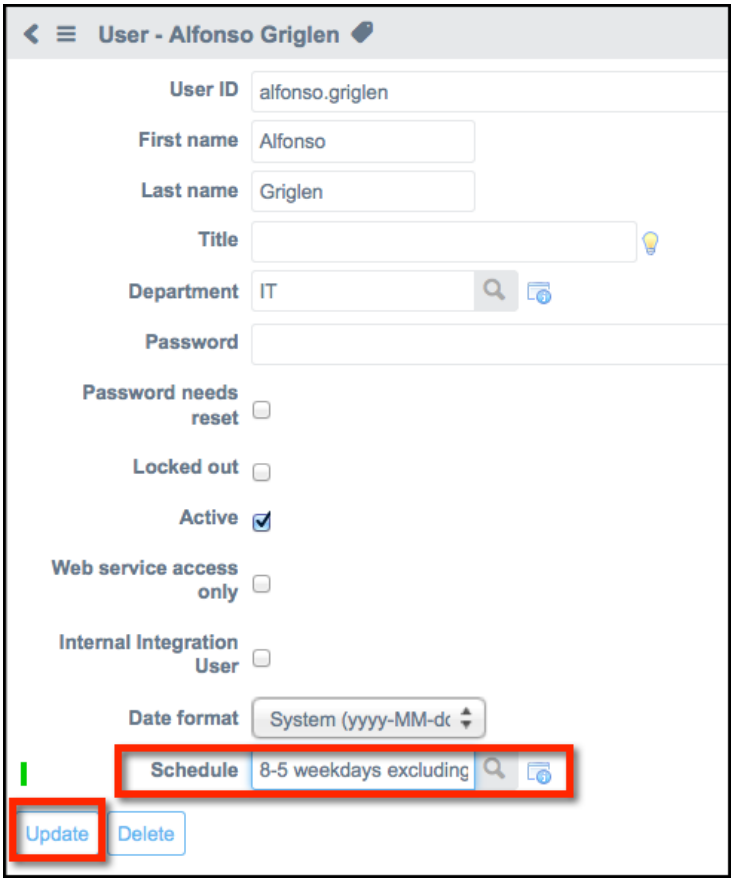
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Add User Schedules for Field Services Resources

1. Navigate to the **Field Services Group Recor**d. You can use the global search or use the Type filter text.

2. For each member of the group, select the user to view their User Record.

3. Select the Schedule for **8-5 weekdays excluding holidays** and update the record.



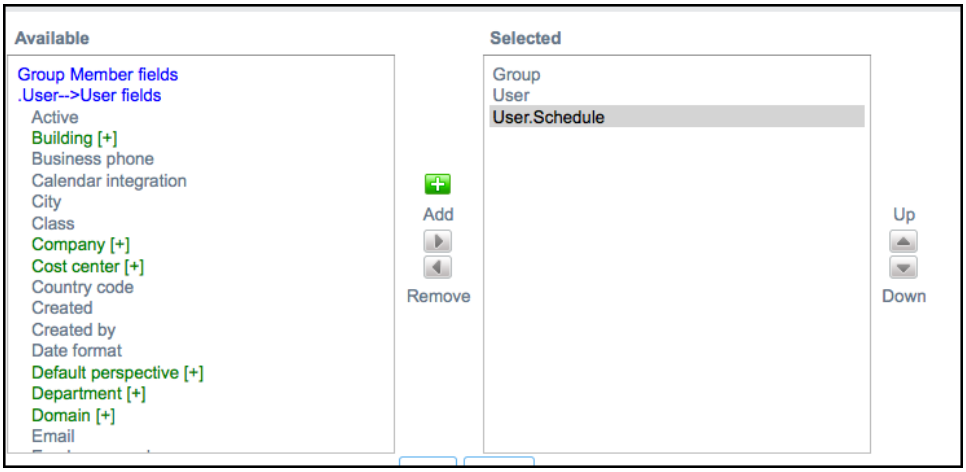
4. Repeat for the remainder of the group members.

NOTE: You can also add the user Schedule field to the Group Members related list to make this task easier. Use **Personalize -> List Layout** and select the **User → Schedule** field. You will only be able to update one record at a time, but it may be effective for viewing the schedules of the group. See screenshots below for the steps to add a field from a related table as an administrator.

5. Right click on the Group Member related list header and select **Personalize → List Layout**.

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6. Click the **User** reference field in the left side of the slushbucket.



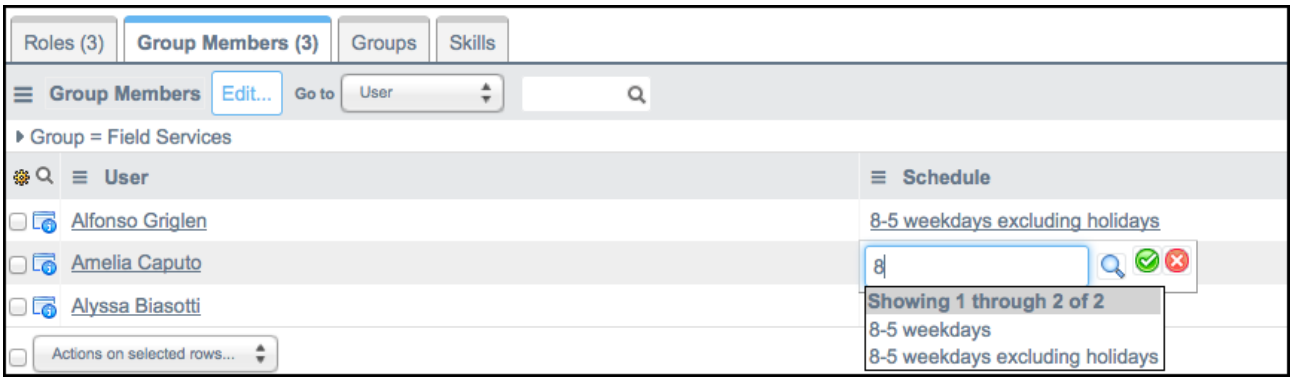
7. Click the  to open up the list of fields for the User table.

8. Click the **Schedule** reference field in the left side of the slushbucket.

9. Click the  to move the Schedule field to the Selected side of the slushbucket.

10. Click **Save**.

11. Add Schedules for each user.

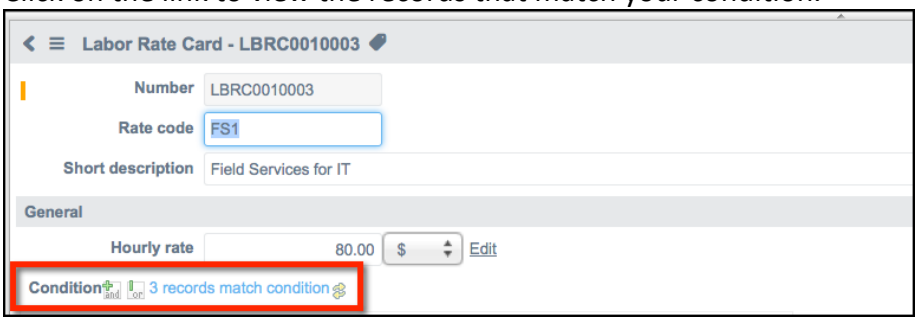


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Lab Success Verification

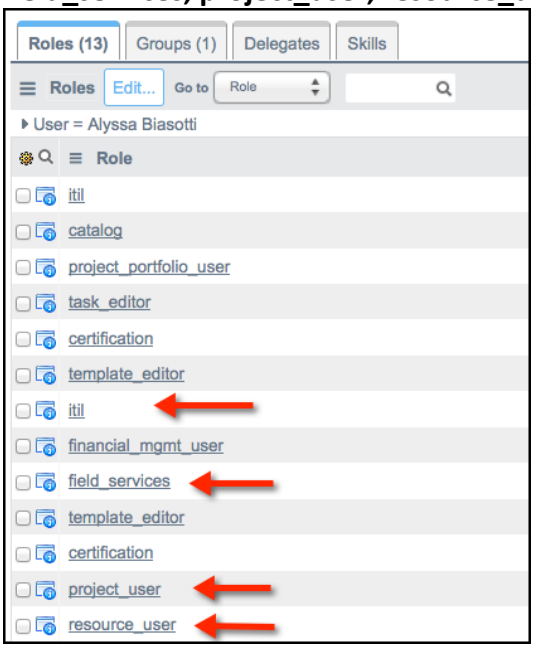
1. Return to the Labor Rate Card for **Field Services.**

2. Click on the link to view the records that match your condition.



3. Verify they are the users you added to the Field Services Group.

4. Click on one of the user records and verify they have the following roles: **field_services, project_user, resource_user, itil.**

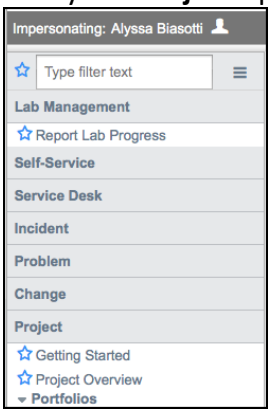


5. Verify the users have schedules associated with their user records.

6. Impersonate one of the Field Services Users.

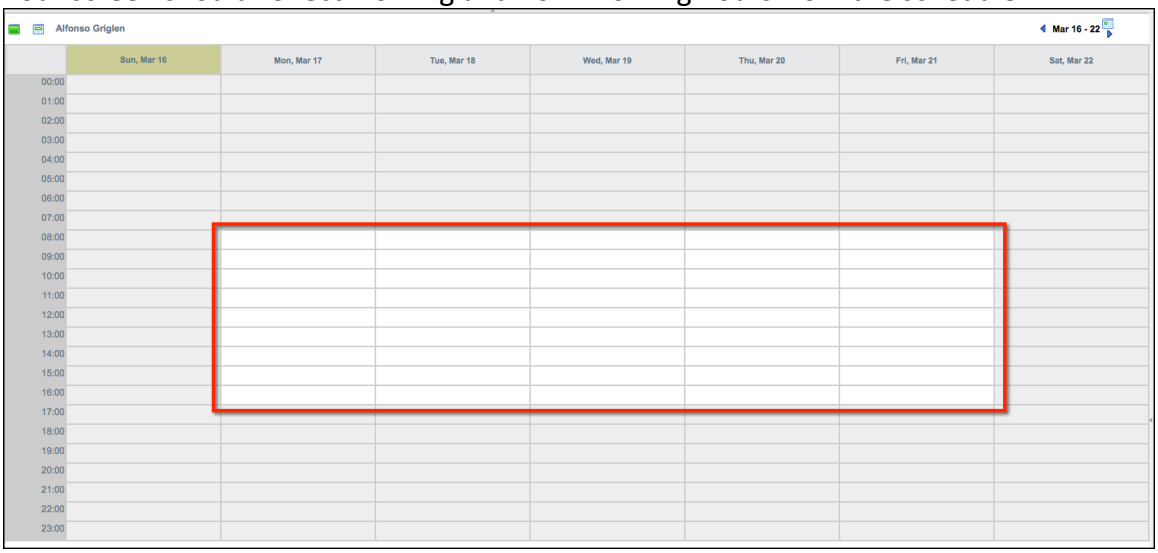
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7. Verify the **Project** Application is shown in the Menu Navigation.



8. Navigate to **Resource Management > My Calendar**.

Your screen should reflect working and nom-working hours from the schedule.



BONUS: Add an appointment to your calendar for August 6th, 7th or 8th to see show it appears in the calendar when allocating resources to the resource plan.

9. Return to impersonating the **System Administrator**.
10. Click the **Lab Management > Report Lab Progress Edge** icon.
11. Enter any comments you wish to make regarding this lab.
12. In the main window, click the **I am done!** button.

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Lab Goal

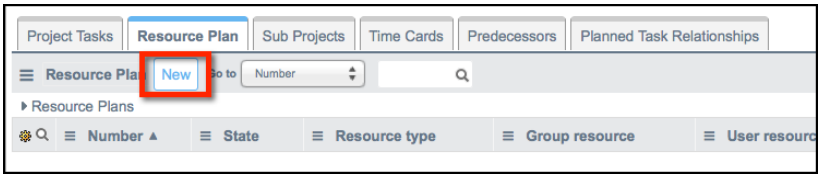
Lab 6
Resource
Plan

This lab explores the elements of the Resource Planning and Costing. It also explains how to Create a Resource Plan for part of the project. We create a resource plan for the Field Services Group to complete the Setup Task:

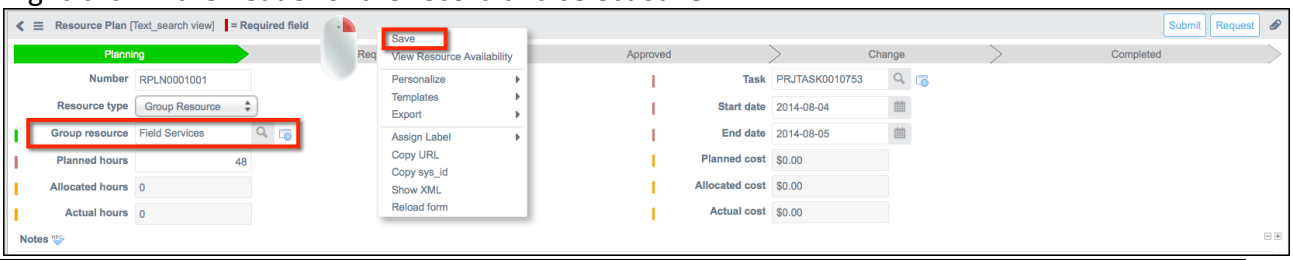
- Setup Data to Resource Management Costing and Calendaring
- Create a Resource Plan
- Fulfill the Resource Plan
- Complete a Task allocated to a Named Resource
- View Costing Information collected in the project

Create Group Resource Plan for Setup the Technology task in the Annual Company Meeting Project

1. Navigate to the **Annual Company Meeting** project.
2. Select the task for **Setup the Event** by clicking o the **WBS** link for the **task** (**5**).
3. Select the task for **Setup the Technology** by clicking on the WBS link for the **task** (**5.1**).
4. Select the **Resource Plan** tab and click **New** to create a new Resource Plan.

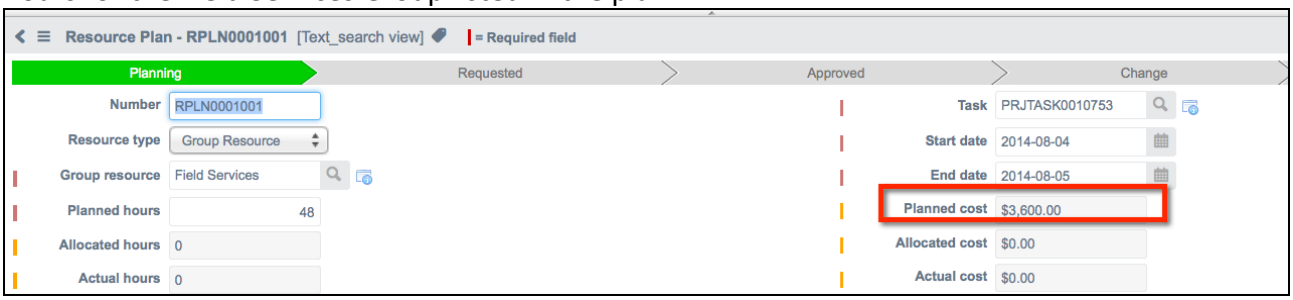


5. Complete the Group Resource field with the value: Field Services.
6. Right-click in the header of the record and select **Save**.



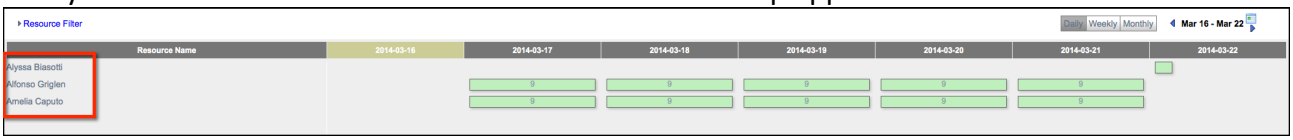
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7. Verify you have a value in the **Planned Cost** that = labor rate for the Field Service Group x hours for the Field Services Group listed in the plan.



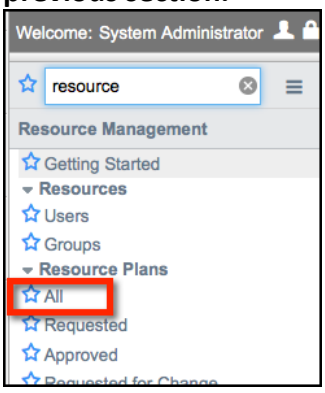
8. Click **View Resource Availability** from the Related Links.

9. Verify the users that were added to the Field Services Group appear in the Resource View.



Allocate User Resources to the Resource Plan

1. Navigate to **Resource Management > Resource Plans > All** by typing Resource in the Type Filter Text and selecting **All. Alternatively, you can navigate back to the record from the previous section.**



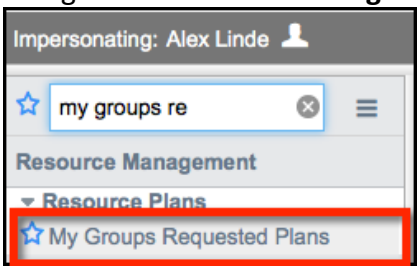
2. Select the new Resource Plan for **Field Services** in the Planning State.

3. Click **Request** to move the Plan to the Requested State.

4. **Impersonate** the Manager of the Field Services Group: **Alex Linde**.

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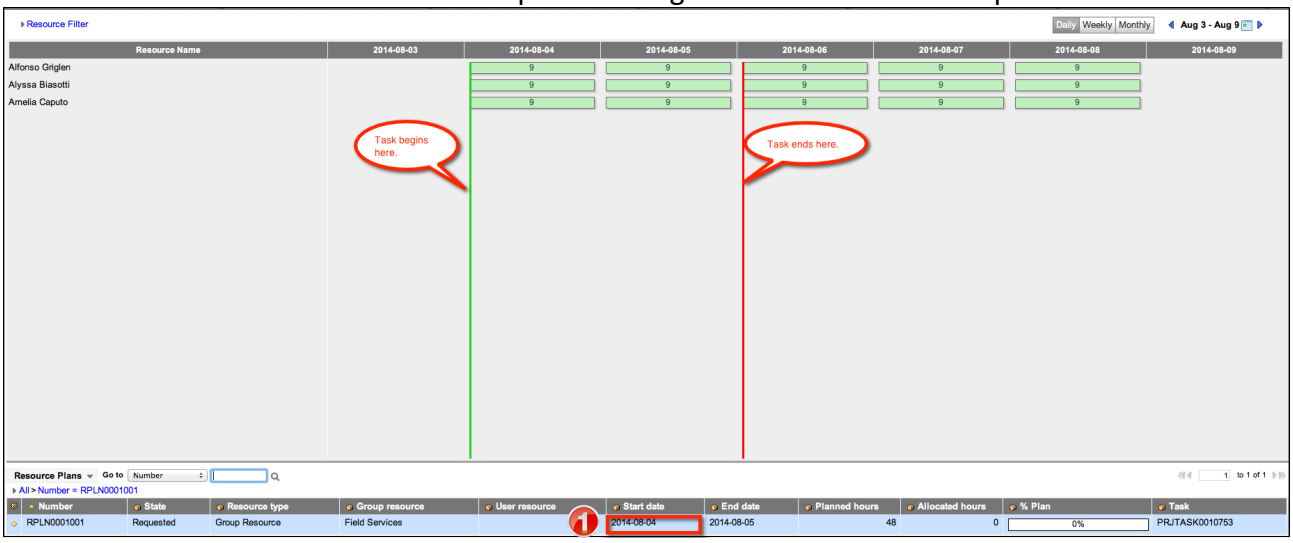
5. Navigate to **Resource Management > My Groups Requested Plans**.



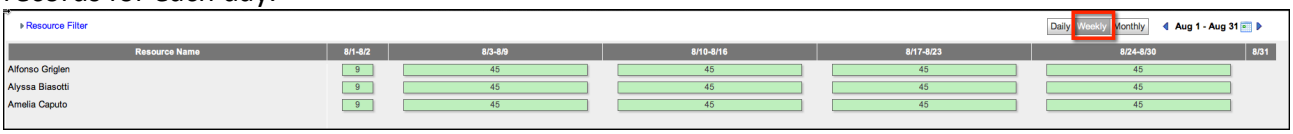
6. Select the **Field Services** Group Plan.

7. Click **View Resource Availability** from the Related Links to bring up the Resource Console.

8. Click on the Start Date for the resource plan to navigate to the dates for the plan.



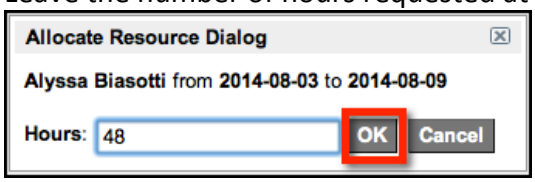
9. Click the **Weekly View** in the Resource View. This will allow the system to take the allocated hours and spread them across the 2 days instead of creating separate Resource Allocation records for each day.



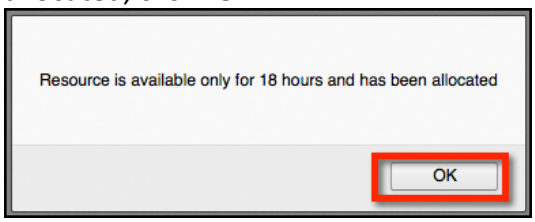
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10. Allocate hours to the 3 resources.

    a. Click in the weekly box for the first resource.
    b. Leave the number of hours requested at 48 and Click OK.



    c. When prompted with the message that the user is only available for 18 hours and has been allocated, click “OK”.



    d. Repeat this process with your other users until you have completed the Resource Plan.

11. Close the Resource Availability window to return to the Resource Plan.

12. Click **Approve** to Approve the Resource Plan.

Lab Success Verification

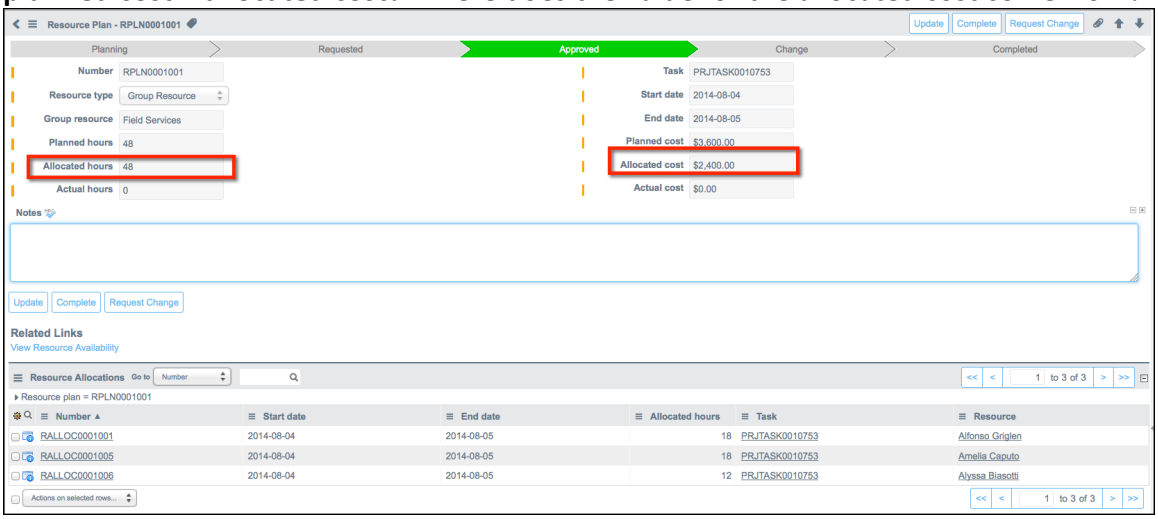
1. Impersonate the System Administrator.

2. Navigate to Resource Management → Resource Plans → Approved.

3. Select the Resource Plan created in the previous lab.

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4. You should have a value in the **Allocated Hours and the Allocated Cost. NOTE:** Does your **planned cost = allocated cost?** Where does the value for the allocated cost come from?



5. Click on the **Lab Management > Report Lab Progress Edge** icon.

6. Enter any comments you wish to make regarding this lab.

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

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Lab Goal

Lab 7 Update Resourced Task

This lab explores the elements of the Resource Planning and Costing and Create a Resource Plan for part of the project. This lab also explains how to create a resource plan for the Field Services Group to complete the Setup Task:

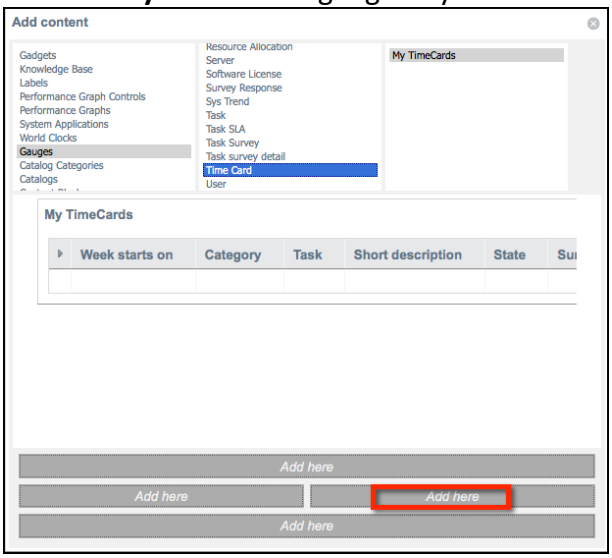
- Setup Data to Resource Management Costing and Calendaring
- Create a Resource Plan
- Fulfill the Resource Plan
- **Complete a Task allocated to a Named Resource**
- **View Costing Information collected in the project**

Modify the ITIL Homepage

1. Select the ITIL Homepage using the **Switch to Page** drop-down list in the top-right corner of the Homepage screen**.**
2. Click the + sign on the top-left corner of the homepage to open the **Add content dialog** box.
3. Select **Gauges.**
4. Select **Time Card**.

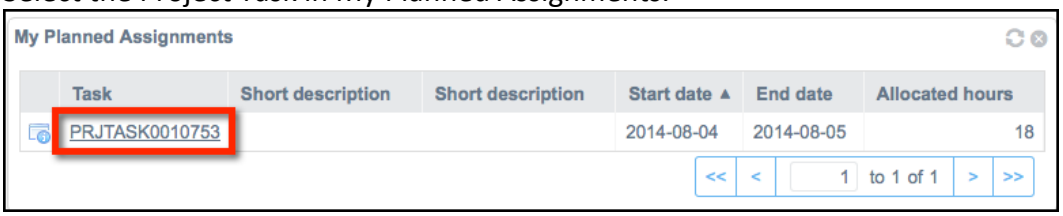
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5. Add the **My Time Cards** gauge to your ITIL homepage by clicking on an area of the drop zone.



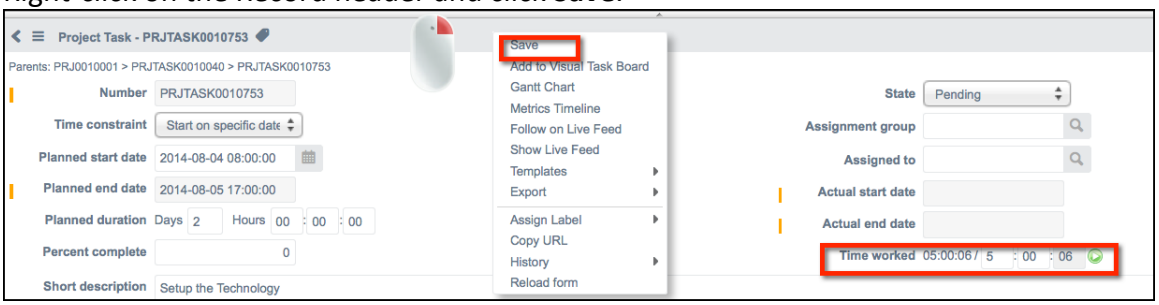
6. Add the **My Planned Assignments** gauge to your ITIL homepage by selecting the gauge in the Resource Allocation Table. The steps will be just like the previous gauge, except selecting My Planned Assignments.

7. Select the Project Task in My Planned Assignments.



8. Enter **5 hours** in the **Time Worked** field.

9. Right-click on the Record header and click **Save**.



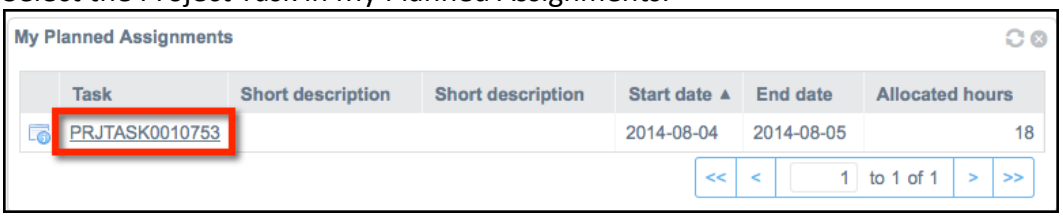
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10. Navigate to the **My ITIL** homepage for your current user. The homepage can be accessed by clicking on the gear icon in the top right corner by the logout button. Click the Home entry which will take you back to the "My ITIL Homepage."

11. View the new timecard entry in the **My TimeCards** gauge.

12. Impersonate a second user in the Field Services Group.

13. Select the Project Task in My Planned Assignments.



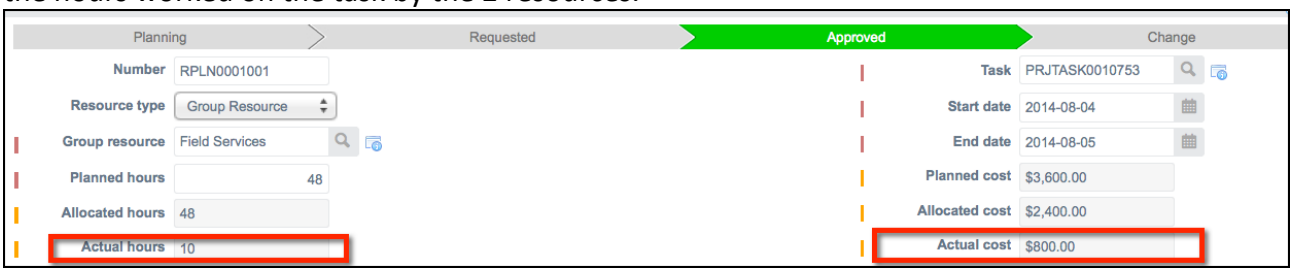
14. Enter **6 hours** in the **Time Worked** field.

15. Change the **Status** to **Closed Complete**.

16. Right click on the **Record** header and click **Save**.

Lab Success Verification

1. Impersonate the **System Administrator**.
2. Navigate to **Resource Management → Resource Plans → Approved**.
3. Select the **Resource Plan** created in the previous lab.
4. View the **Actual Hours** and **Actual Cost** fields. The Actual Hours field should contain the sum of the hours worked on the task by the 2 resources.



5. Click on the **Lab Management > Report Lab Progress Edge** icon.
6. Enter any comments you wish to make regarding this lab.
7. In the main window, click **I am done!**

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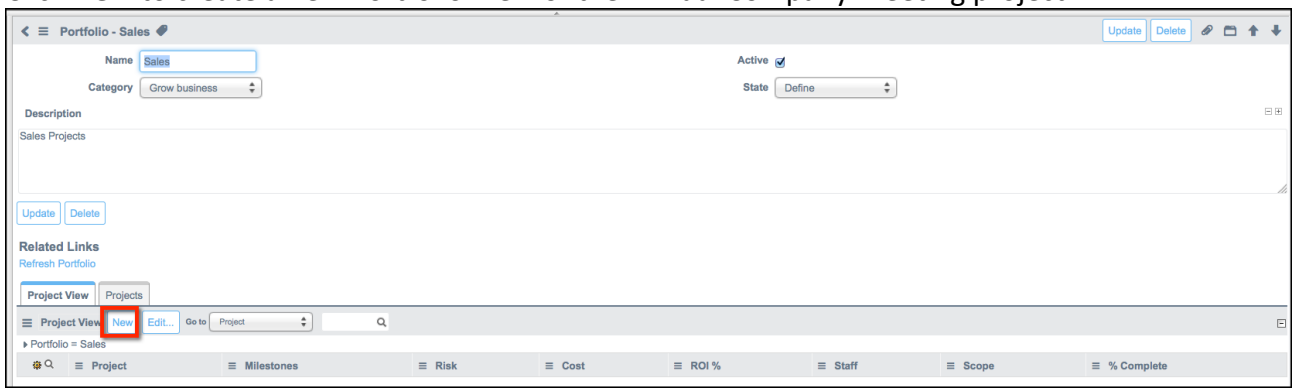
Lab Goal

This explains the process of adding a Project to a new Portfolio.

Lab 8
Project
Portfolio

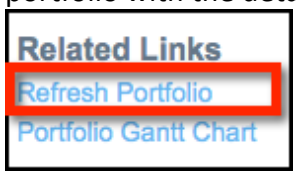
Create a New Portfolio

1. Navigate to **Project** → **Portfolios** → **All**.
2. Select the **Sales** Portfolio.
   Click **New** to create a new Portfolio View of the Annual Company Meeting project.



3. In The Portfolio Project form, use the 

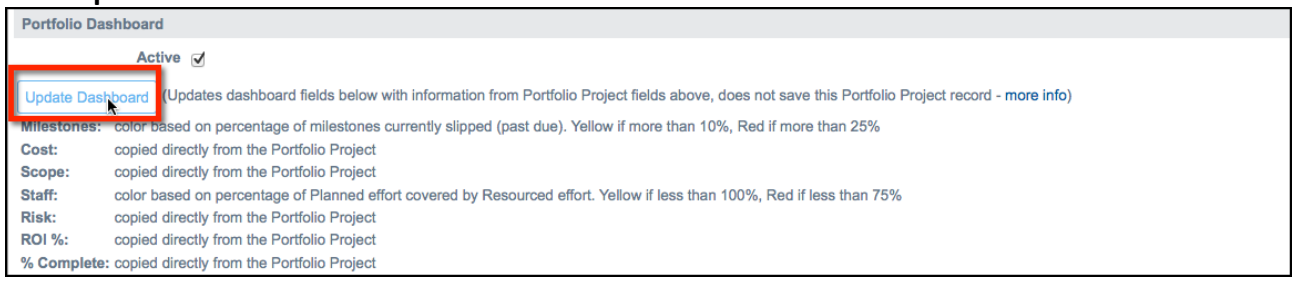
to select the Annual Company meeting project.
4. Click **Submit**.
5. From the Sales Portfolio, click the **Refresh Portfolio Related Action**. This populates the portfolio with the details of project.



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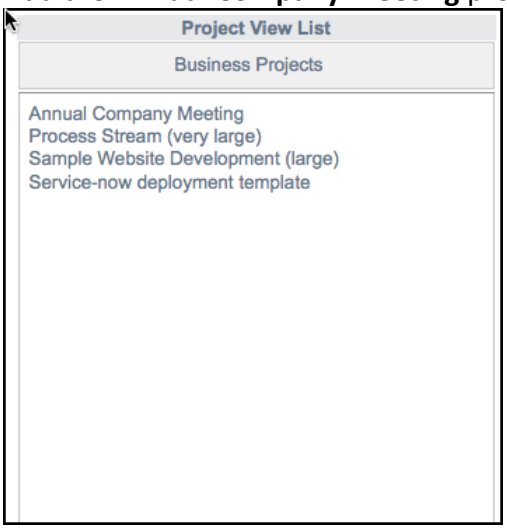
Update Sales Portfolio View with Project Details

1. Select the **Annual Company Meeting** project from the Project View Related List.
2. Change **the % Complete** target to **15**.
3. Click **Update Dashboard UI Action**.
4. Click **Update**.



Add the Annual Company Meeting project to the Business Projects Portfolio

1. Navigate to **Project → Portfolios → All**.
2. Select the **Marketing Portfolio**.
3. Click **Edit** on the Project View Related list.
4. Add the **Annual Company Meeting** project to the Project View List.



5. Click **Update**.

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Lab Success Verification

1. Navigate to **Project → Portfolios → All.**
2. Expand the **Portfolio Project** list for the **Sales Portfolio** by clicking on the **arrow** next to the Sales Portfolio.
3. The Annual Company Meeting Project appears in the portfolio.
4. Expand the **Portfolio Project** list for the **Business Portfolio** by clicking on the **arrow** next to the Business Portfolio.
5. The Annual Company Meeting Project appears in the portfolio.
6. Click on the **Lab Management > Report Lab Progress Edge** icon.
7. Enter any comments you wish to make regarding this lab.
8. In the main window, click **I am done!**

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