knowledge14®

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

Project Portfolio Management 201

Emily McMullin
Sr. Solution Consultant
ServiceNow

Molly Feterl
Sr. Technical Consultant
ServiceNow

servicenow®

© 2014 ServiceNow All Rights Reserved

Agenda

Overview

Setting up the Project Environment

Linking a Project Task with Change Management

Resource Management

Portfolio

© 2014 ServiceNow All Rights Reserved

Project Management Overview

Operational and Strategic Demand in the Service Lifecycle

© 2014 ServiceNow All Rights Reserved

Service Lifecycle

Demand from the Business

Grow & Transform the Business

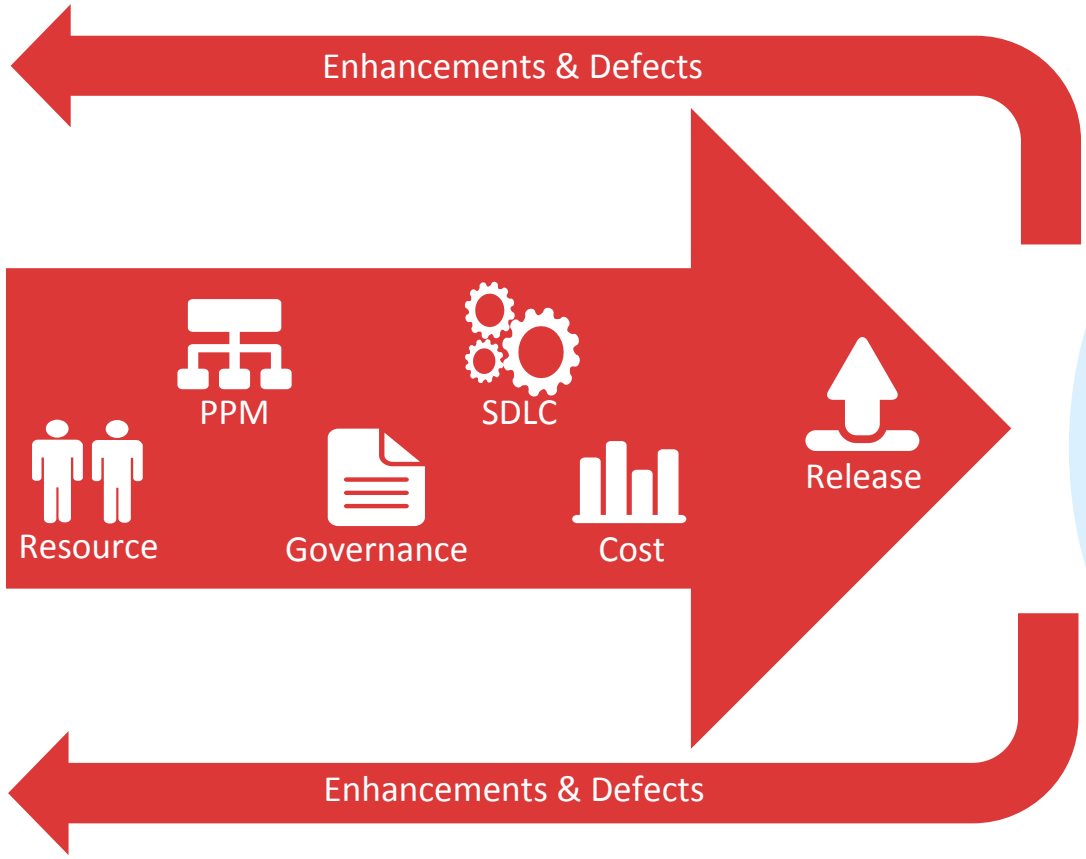
Run the Business

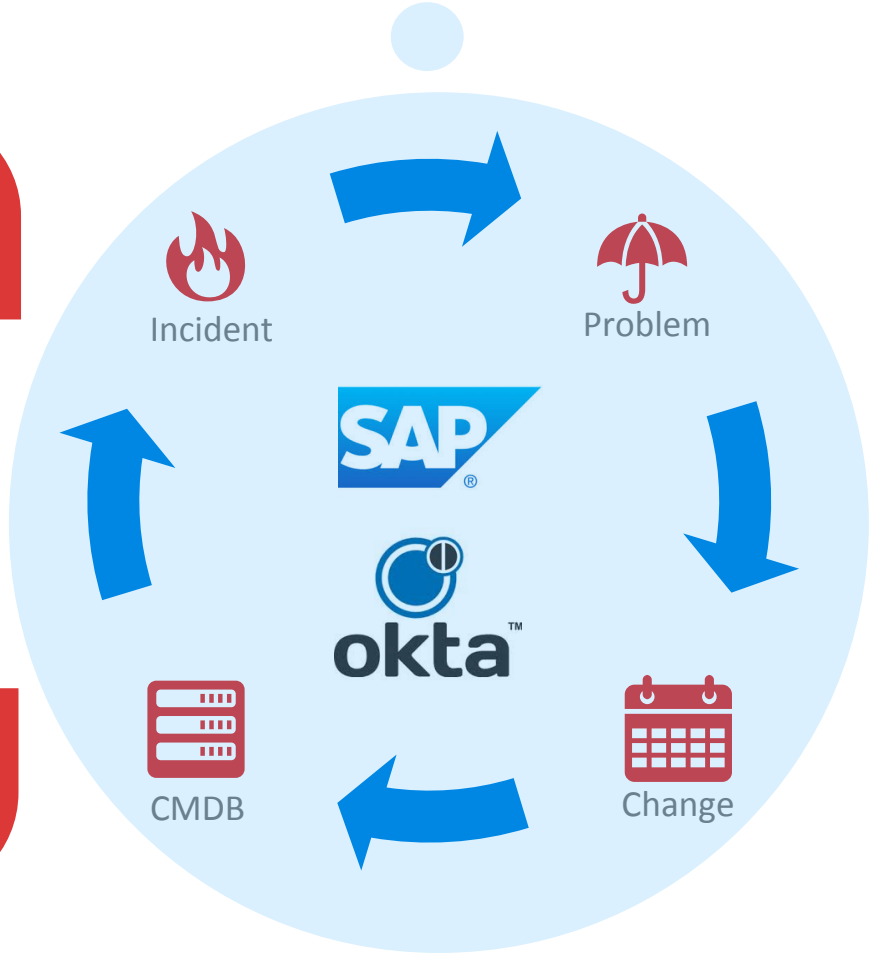
Request: Project

Displace NetSuite with SAP ERP

Request: Project

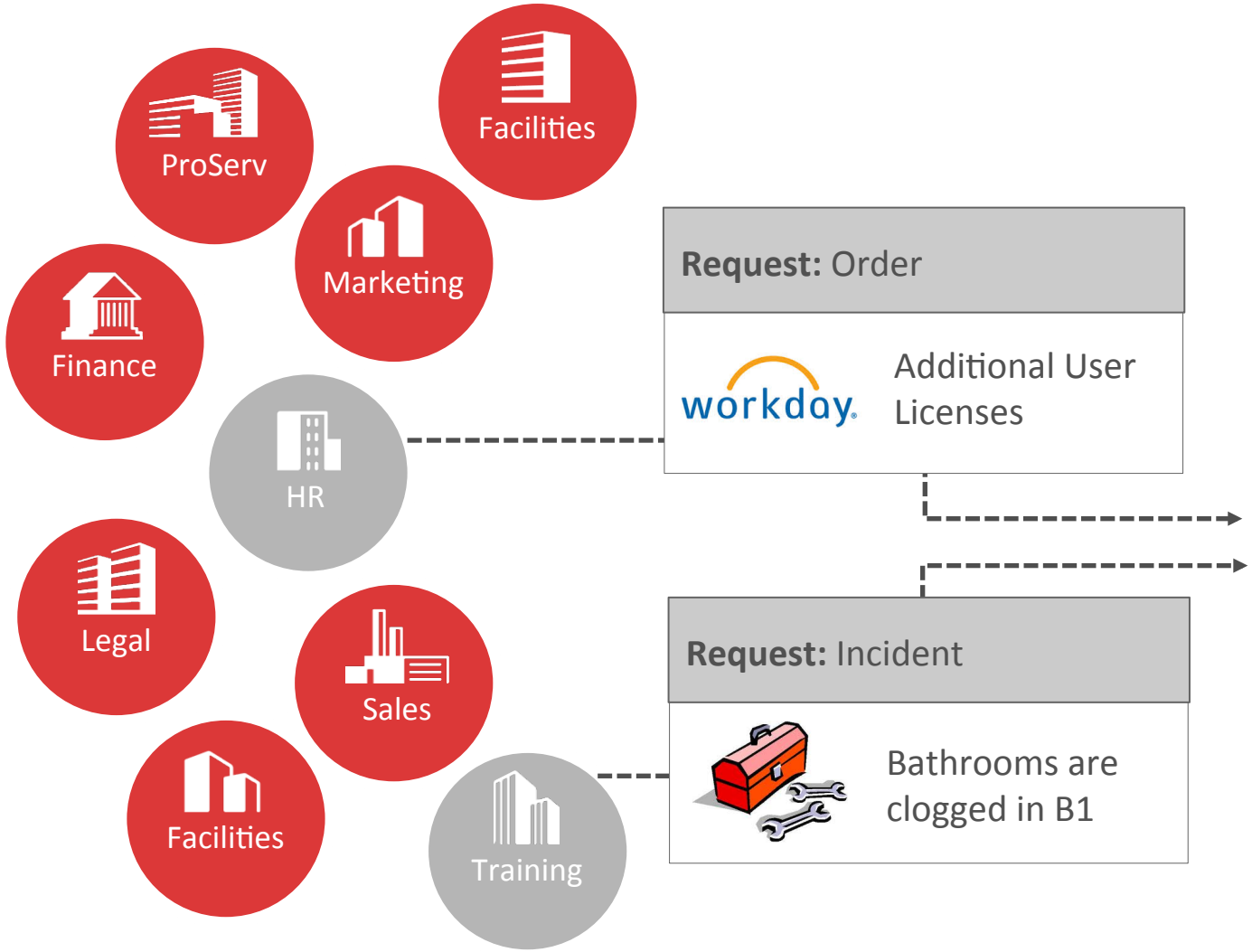
Implement Okta for IDE

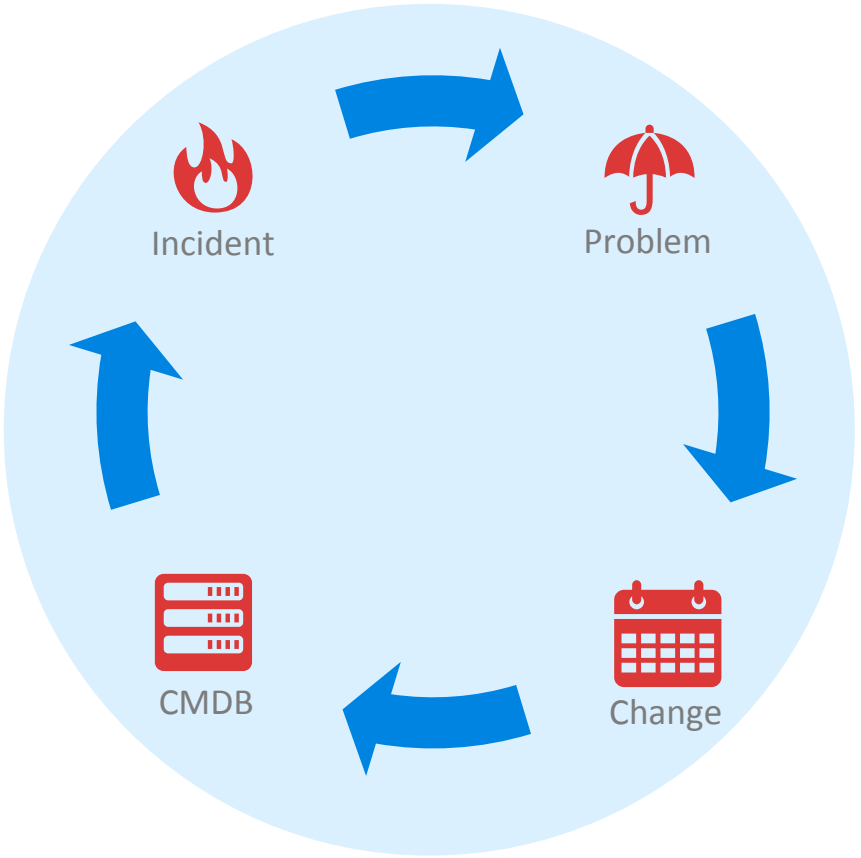




© 2014 ServiceNow All Rights Reserved

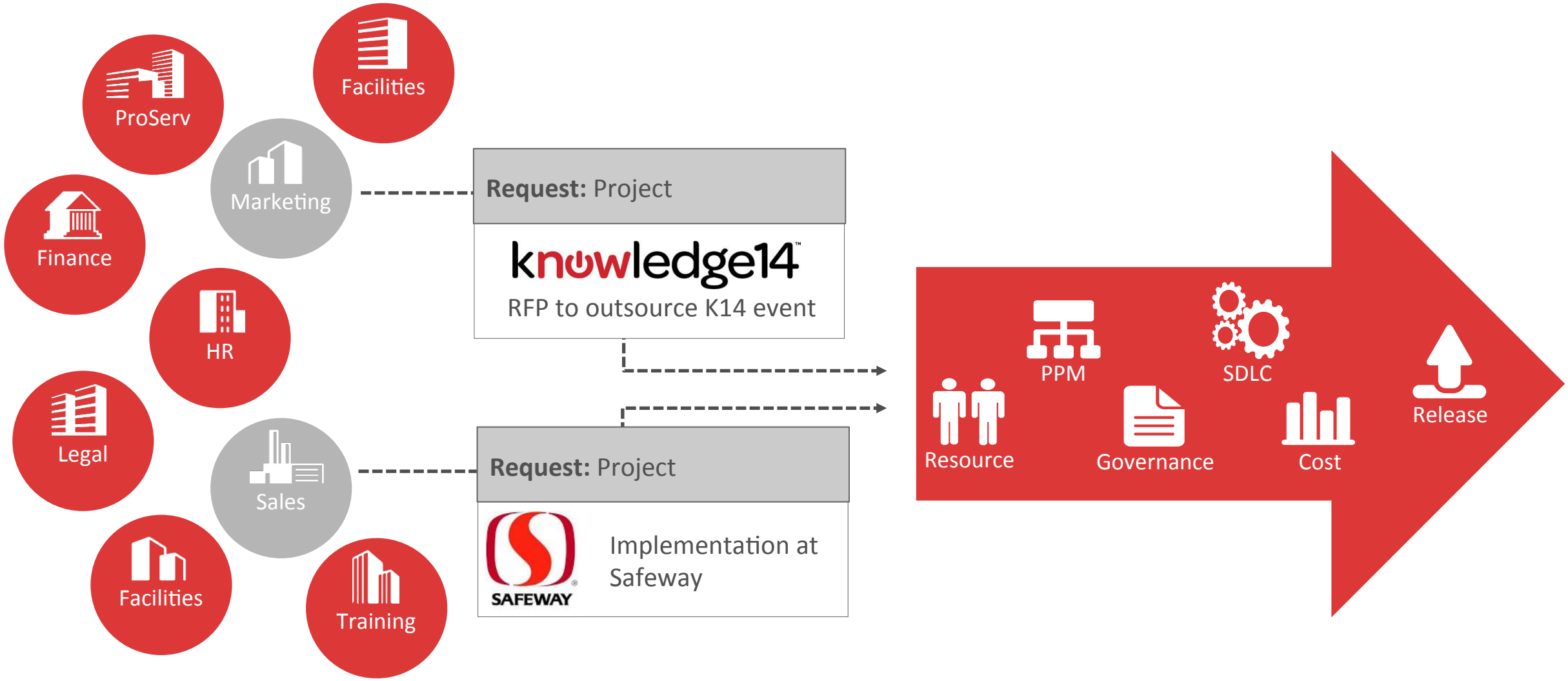
Run the Business





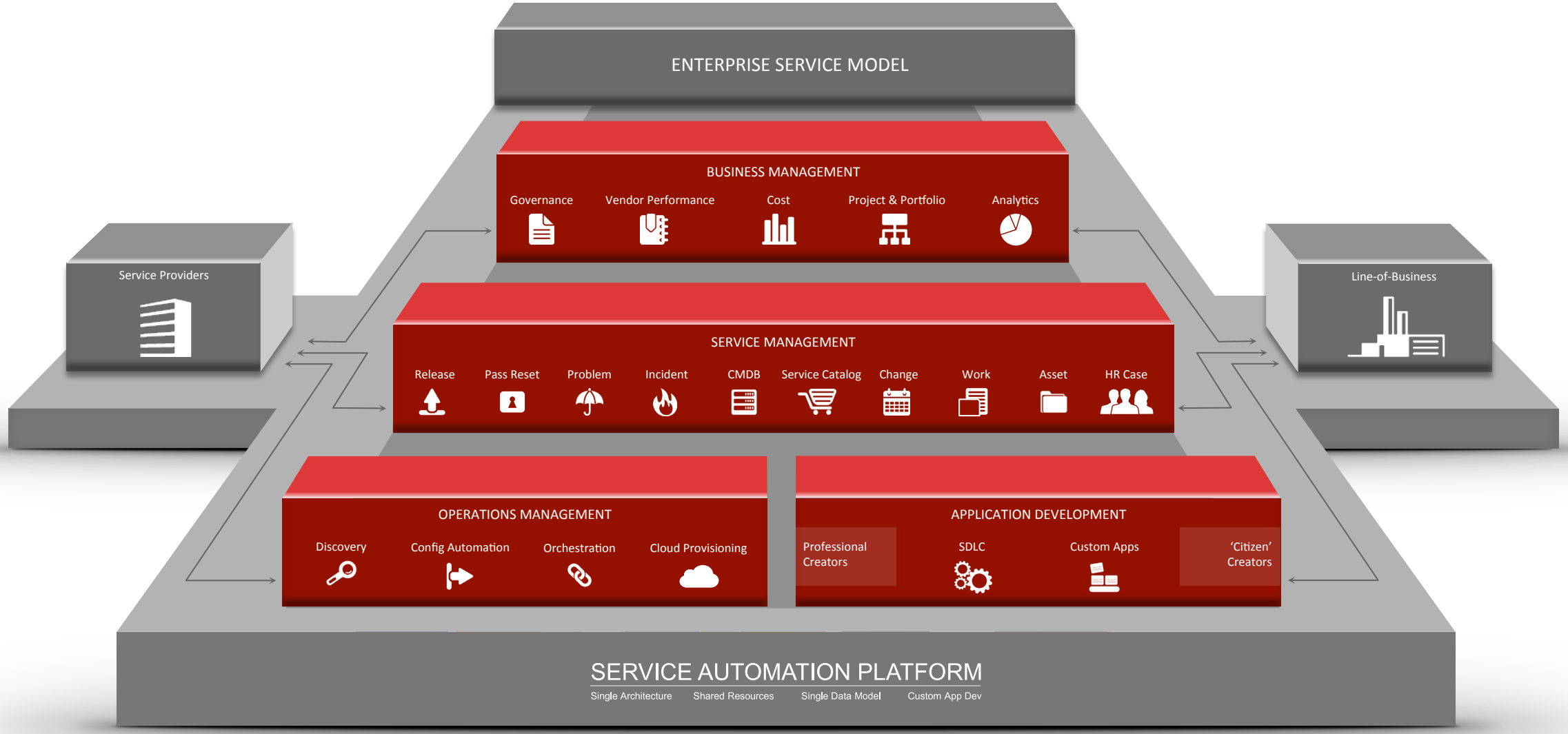
© 2014 ServiceNow All Rights Reserved

Grow & Transform the Business



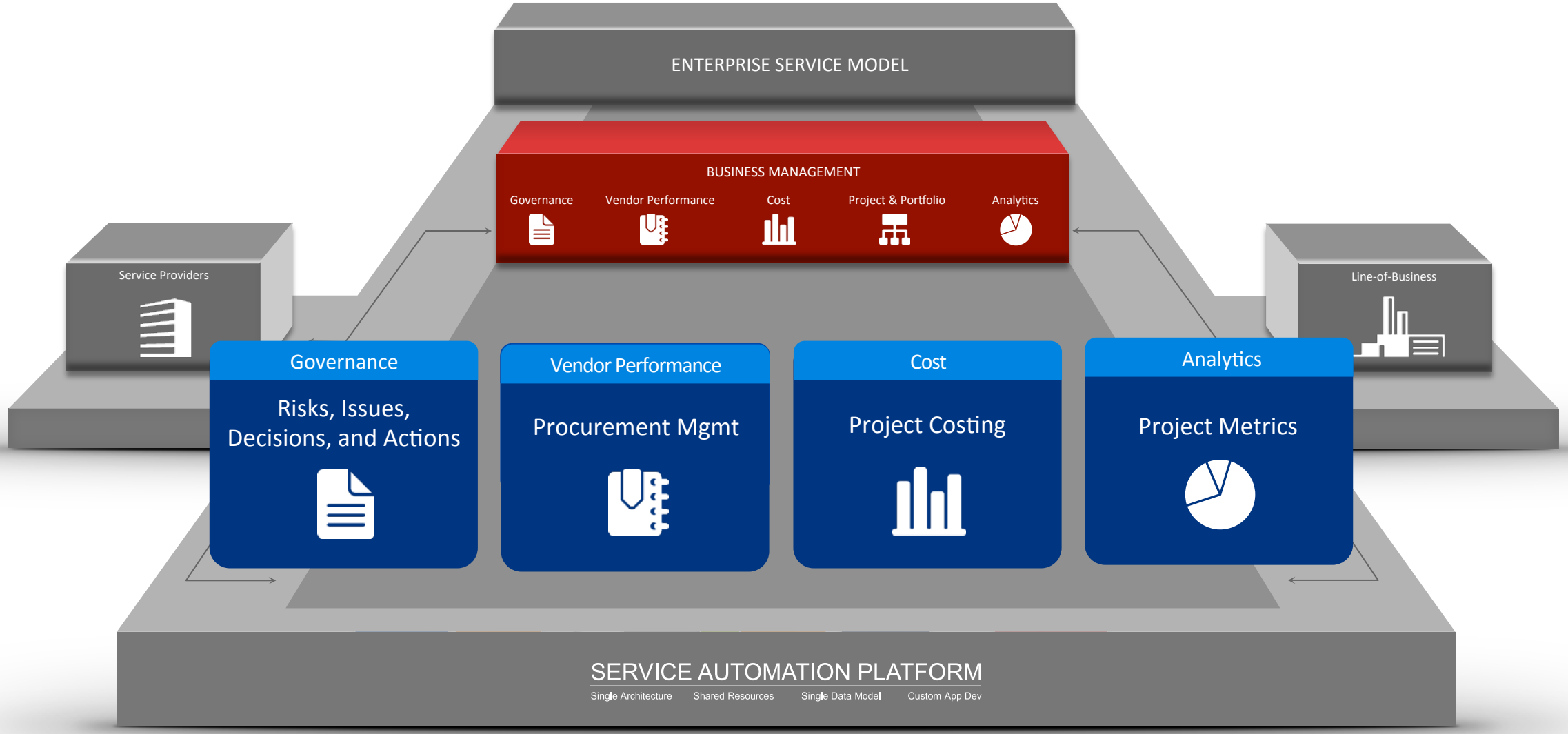
© 2014 ServiceNow All Rights Reserved

ServiceNow: Managing Enterprise Service Relationships



© 2014 ServiceNow All Rights Reserved

PPM and the ServiceNow Portfolio



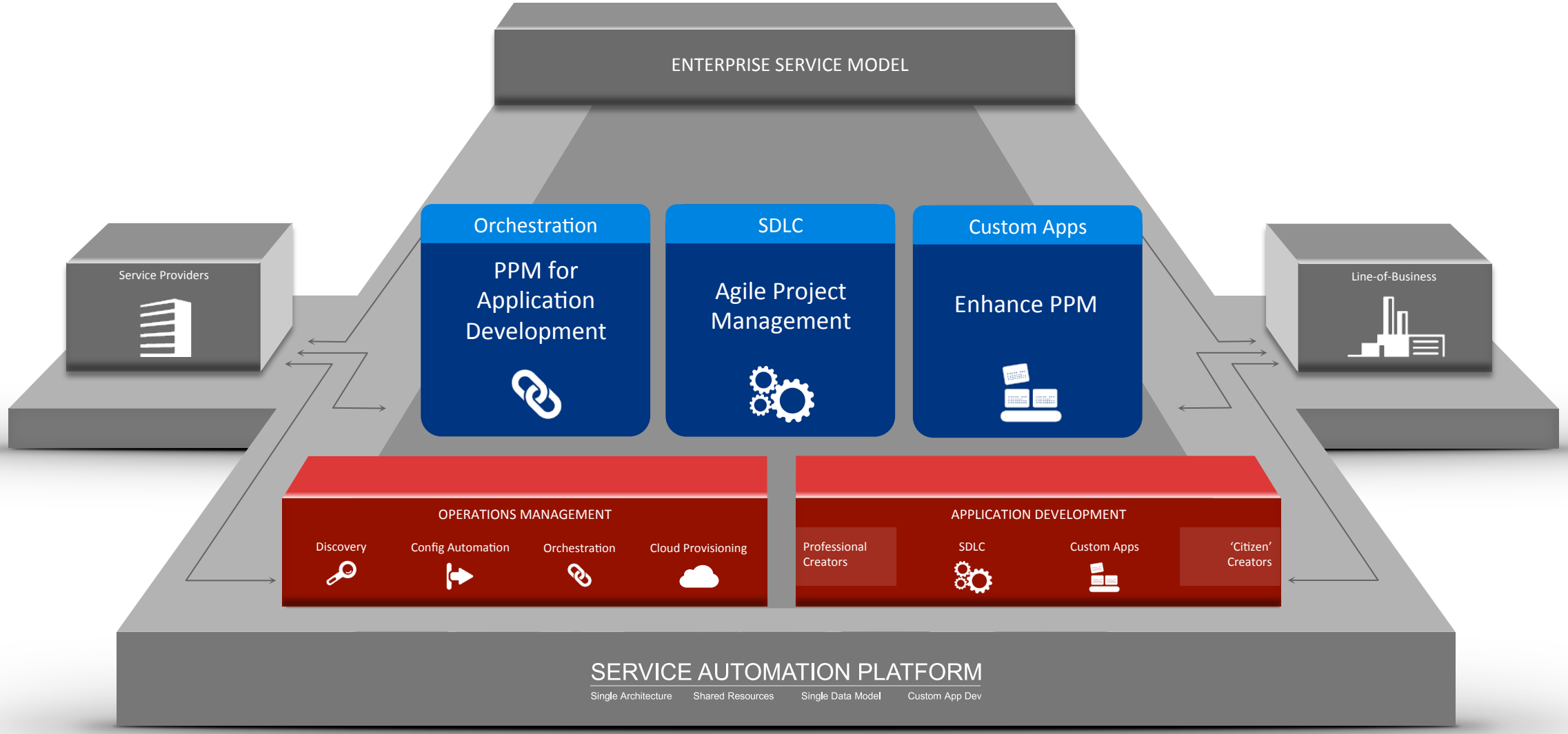
© 2014 ServiceNow All Rights Reserved

PPM and the ServiceNow Portfolio



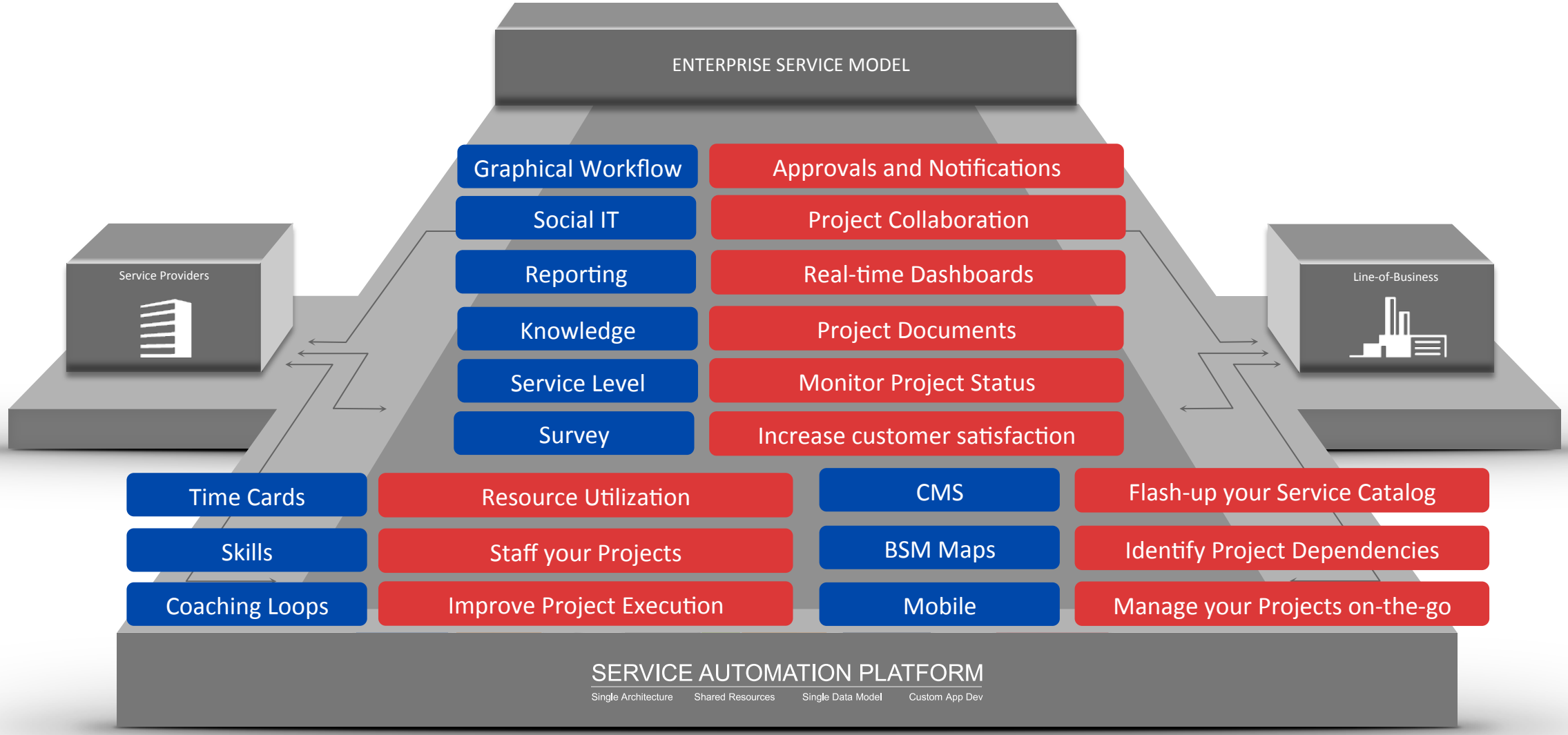
© 2014 ServiceNow All Rights Reserved

PPM and the ServiceNow Portfolio



© 2014 ServiceNow All Rights Reserved

PPM and the ServiceNow Portfolio



© 2014 ServiceNow All Rights Reserved

Plugins enabled for Lab

- Project Management V3 - Dublin
  - Time Card Management
  - Cost Management
  - Skills Management
  - Process Flow Formatter
- Resource Management - Dublin
- IT GRC

© 2014 ServiceNow All Rights Reserved

Project Environment Setup

Labs 1 - 3

© 2014 ServiceNow All Rights Reserved

Project Environment Setup

Lab 1 – Setup Global Search

- Lab #1 – Setup Global Search – 10 minutes
- Lab #2 – Enable Live Feed – 10 minutes
- Lab #3 – Setup WBS – 10 minutes

© 2014 ServiceNow All Rights Reserved

Using Project Change Links

- Lab #4 – Using Project Change Links – 10 minutes

© 2014 ServiceNow All Rights Reserved

Resource Management

- Lab #5 – Data for Costing – 30 minutes
  - Configure Field Services Group
    - Add Rate and Manager to Field Services Group
    - Add roles to the Field Services Group
    - Add Group Members to Field Services – TAKE NOTE OF THEIR NAMES
  - Create Labor Rate Card for Field Services
  - Update Service Desk Labor Rate Card
  - Add User Schedules for Field Services Resources

© 2014 ServiceNow All Rights Reserved

Resource Management

- Lab #6 – Resource Planning – 15 minutes
  - Create Resource Plan for Field Services
  - Allocate User Resources

- Lab #7 – Complete Resourced Task – 10 minutes
  - Add gauges to ITIL homepage
  - Update project task

© 2014 ServiceNow All Rights Reserved

Project Portfolio

- Lab #8 – Portfolio Project – 10 minutes
  - Create New Portfolio view
  - Add Project to Sales Portfolio
  - Add Project to Business Projects Portfolio

© 2014 ServiceNow All Rights Reserved

Top Takeaways

1 Leverage the ServiceNow Platform to enhance the capabilities of Project Management

2 Connect Operational Project Tasks to Change Management to drive project schedule

3 Capture project resource time and expenses in a single system of record

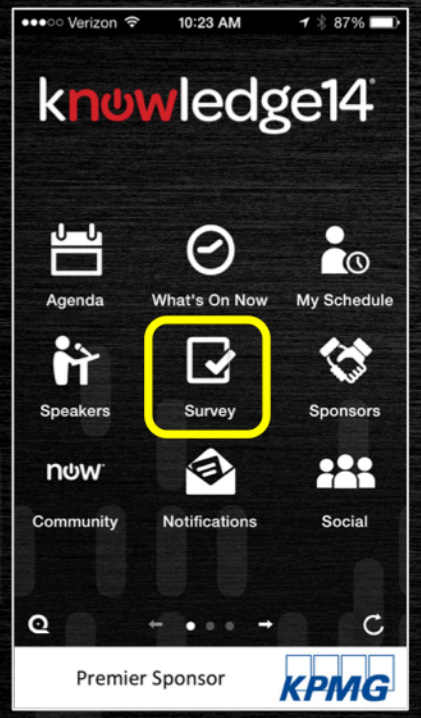
© 2014 ServiceNow All Rights Reserved

Useful Resources

- Project Management wiki site
  - https://wiki.servicenow.com/index.php?title=Project_Management
- Resource Management wiki site
  - https://wiki.servicenow.com/index.php?title=Resource_Management
- A Refreshing Approach to Project Portfolio Management webinar
  - http://info.service-now.com/LP=2056

© 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. Solution 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

